

The Product Manager's **INFLUENCE MAP**

A Practical Guide to Organizational Alignment and
Relationship-Building for Product Teams



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PREFACE

Most product managers are aware of the mantra that we “lead through influence and not authority.” Yet many entered their roles with very little guidance on what this means and how to apply it within their organizations. Over the past year, Pendo has worked closely with hundreds of product teams and surveyed hundreds more as a part of our “State of Product Leadership” survey with Product Collective. Through that work, a clear theme has emerged: product leaders who can create strong alignment with the various stakeholders within their organizations build the most successful products and companies.

New product managers must acquire these skills quickly to be effective in their jobs.

We’ve created this map to help define what it means to lead through influence and guide new product leaders through the interactions they’ll have on a daily basis at work. Our goal is to help product managers build the strong and trusted relationships that lead to better products.

“

A great product manager has the brain of an engineer, the heart of a designer, and the speech of a diplomat.

DEEP NISHAR

Rather, product managers have to demonstrate leadership in the purest sense—we must inspire people to follow our lead; we must lead people to make the decisions we think are best; we must align different perspectives so they're all fixed on the same goal.

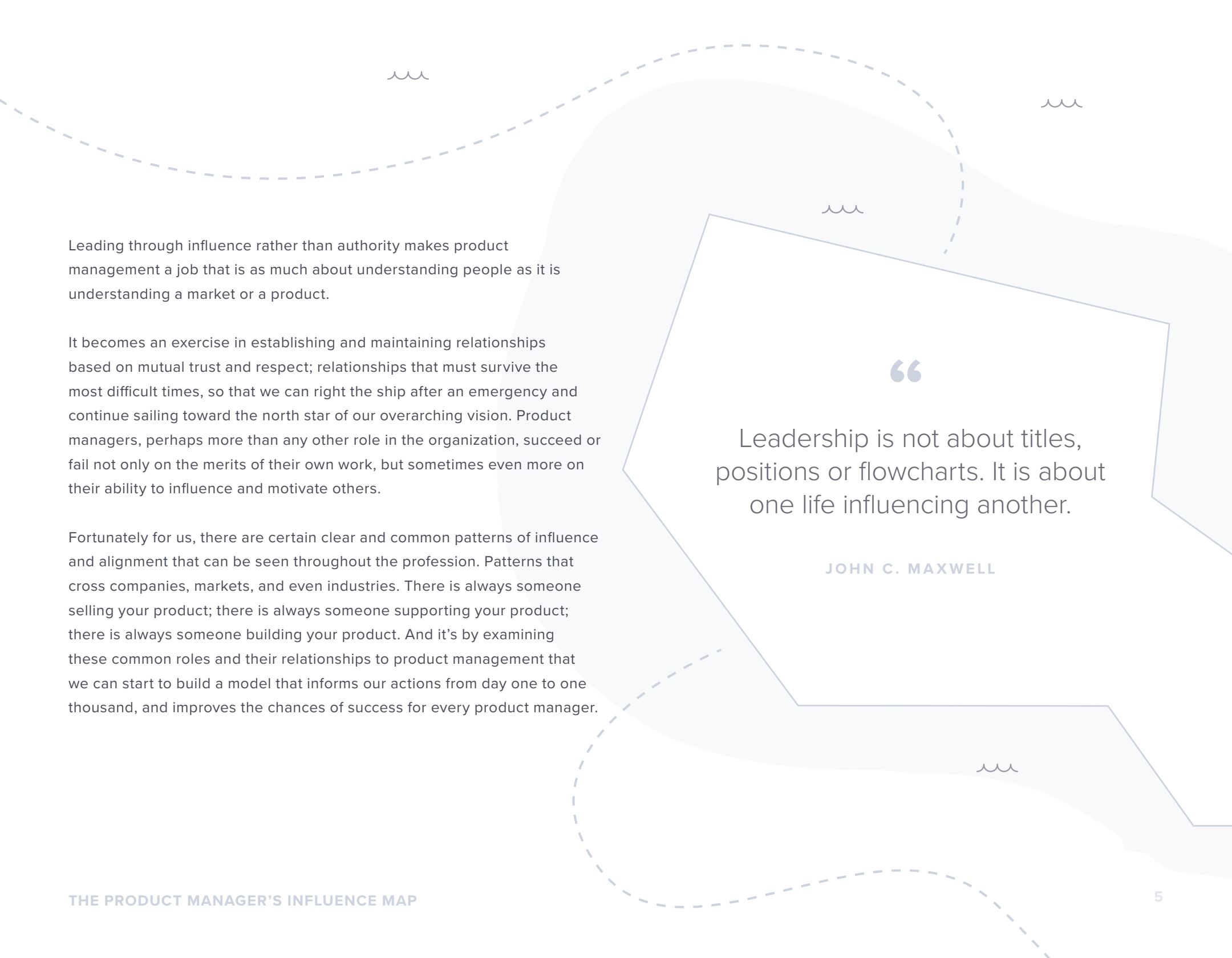
Leading through influence is the defining characteristic of a truly great product manager—getting others to support your initiatives without becoming a bulldog or, worse, a bull in a china shop.

But unfortunately, it isn't a skill that's taught in most undergraduate or graduate programs, or even in classroom-based product management certifications. It's a skill that develops over time and all-too-often through trial and error by a newly-minted product manager tossed into the deep end with little or no guidance.

There are positives and negatives to this way of learning. Once the skill is mastered, a product manager isn't really a manager, but a true leader. The downside is how difficult it is to know if you're doing it right due to the weeks or months it can take to see an impact. If our efforts misdirect or hamper the team, we might not be able to correct it immediately, because we don't always know that the train is on the wrong track until it arrives at its next station.

Product Managers Lead Through Influence

Anyone who has spent any time at all in product management has not only heard this truism, but has experienced it firsthand. It is extremely rare for a product manager to be in a position with direct reports. Product managers don't hold the pursestrings to decide who gets a bonus, raise, or promotion. Product managers don't perform annual reviews of the people they rely on to get their jobs done.



Leading through influence rather than authority makes product management a job that is as much about understanding people as it is understanding a market or a product.

It becomes an exercise in establishing and maintaining relationships based on mutual trust and respect; relationships that must survive the most difficult times, so that we can right the ship after an emergency and continue sailing toward the north star of our overarching vision. Product managers, perhaps more than any other role in the organization, succeed or fail not only on the merits of their own work, but sometimes even more on their ability to influence and motivate others.

Fortunately for us, there are certain clear and common patterns of influence and alignment that can be seen throughout the profession. Patterns that cross companies, markets, and even industries. There is always someone selling your product; there is always someone supporting your product; there is always someone building your product. And it's by examining these common roles and their relationships to product management that we can start to build a model that informs our actions from day one to one thousand, and improves the chances of success for every product manager.

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Leadership is not about titles, positions or flowcharts. It is about one life influencing another.

JOHN C. MAXWELL

Methodology & Definitions

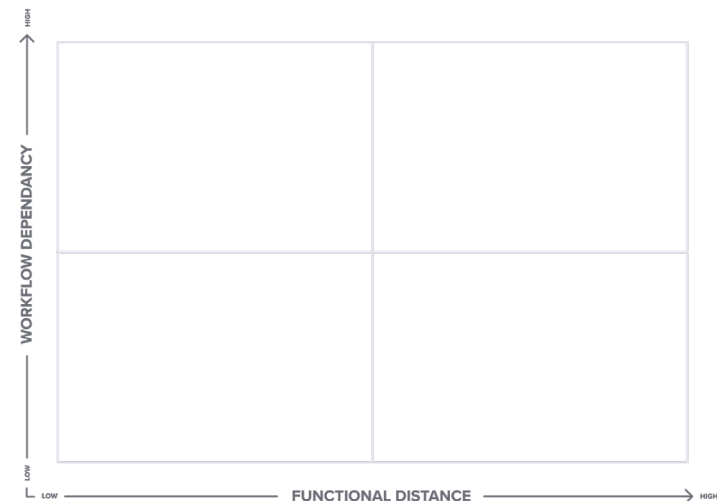
We've identified eight key roles in the organization that product managers in nearly every company will interact with on a regular basis. Depending on the nature of the business and the market that the product is targeting, some of these functions might be more important or more impactful than others—for example, in a B2C business, the marketing team will have much more power and influence than in a B2B context, in which case sales might be one of the strongest driving forces in the organization.

- Business Operations
- Customer Success
- Engineering
- Finance
- Human Resources
- Marketing
- Sales
- Technical Support

You will note that C-level executives are not included in this list; we determined that the relationship between product management and these roles is unique and as a result falls outside of this model. We'll describe that relationship separately.

Each of these eight key stakeholder groups was then plotted against the axes of functional distance and workflow dependency:

1. **Functional Distance:** How closely aligned is the job role with the core duties and responsibilities of a product manager? How do their goals, KPIs/OKRs, and reporting structure relate to and align with those of product management?
2. **Workflow Dependency:** How much impact can the work done (or not done) by the people in this role have on the success of the efforts of a product manager? Are there responsibilities typically associated with this role that can constrain or block a product, feature, or improvement from being successfully released to the market?



Based on their score against each of these axes, the groups have been assigned to one of four quadrants of influence and concern:

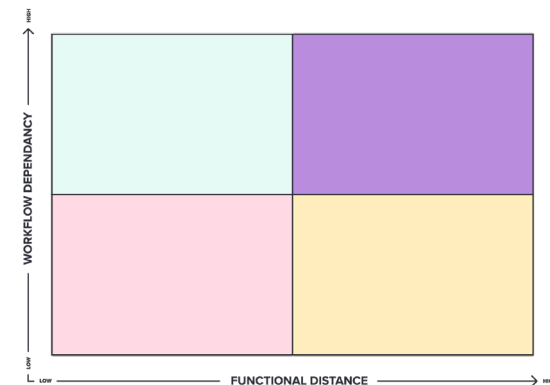
Critical Supporters: Roles that are both functionally close to the product manager and upon whom the product manager depends greatly to deliver their product to market; relationships with these stakeholders must be managed closely and carefully to ensure that the teams are tightly aligned with one another on a daily basis.

Accelerators: Roles that are functionally close to the product manager but whose work streams and workflows are largely independent of the product manager's work to bring a product to market; these are teams whose alignment with the product management team can accelerate business goals, but where a lack of strong alignment may not diminish the ability to deliver quality product to the market.

Potential Disruptors: Roles that are not functionally close to the product manager, but whose priorities and motivations can severely impact the ability of the product manager to successfully deliver products to market; these are the teams with whom product managers may struggle at times to build a strong and reliable relationship, but whose alignment to the goals of the product team can be essential to success.

Outliers: Roles that are neither functionally close to the product manager, nor do they create strong dependencies for product success; these teams may have some impact on the periphery of the product manager's role, and they are often influencers within the organization as a whole, but their direct day-to-day work will have little impact on the success of a product being brought to market.

In each chapter to follow, these groups will be described in further detail, along with suggestions on how a new product manager might approach each of them with an eye toward building a strong, lasting relationship that maximizes the likelihood of success in bringing new products, features, or enhancements to market.



CRITICAL SUPPORTERS

Marketing
Engineering



ACCELERATORS

Technical Support
Customer Success



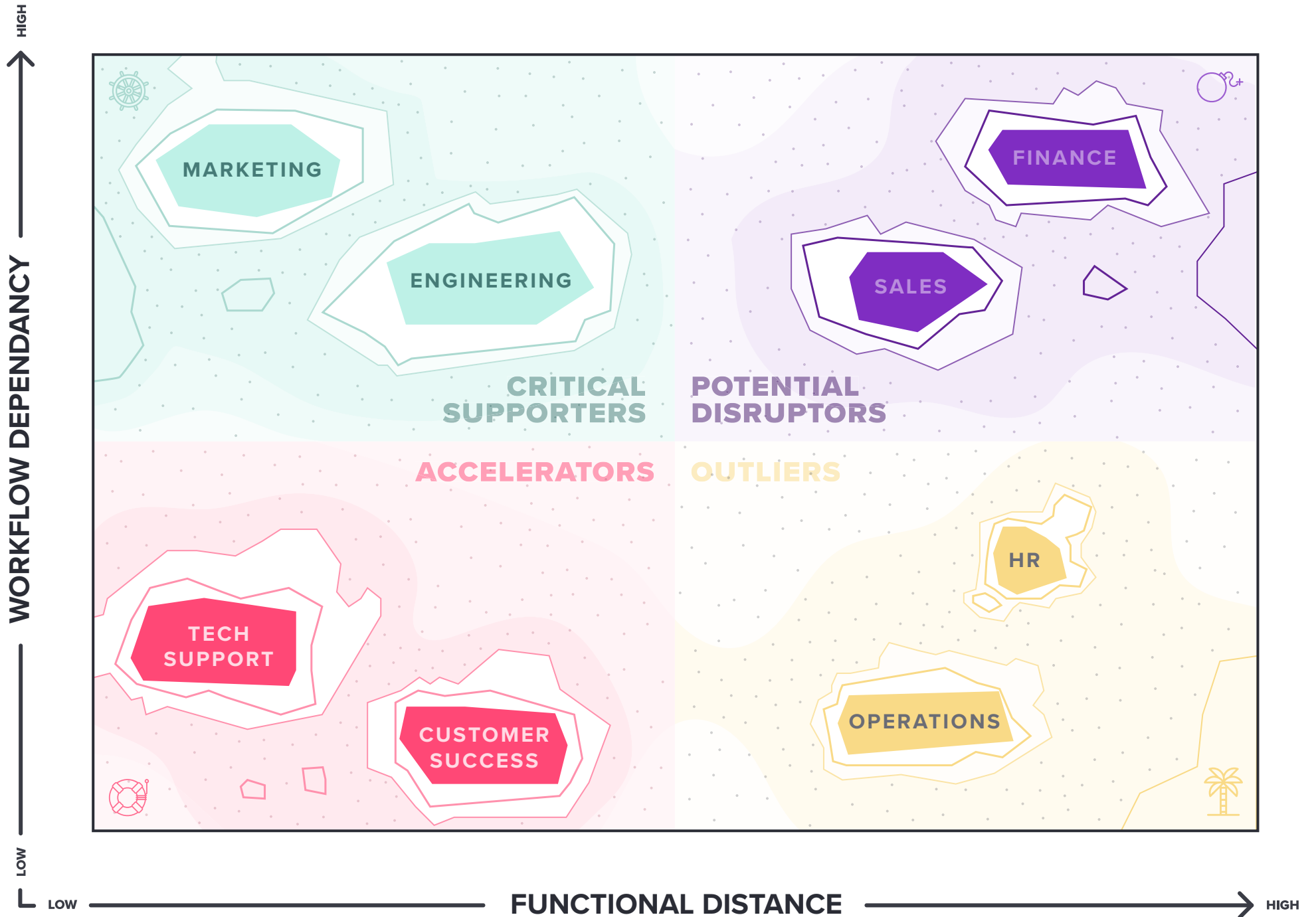
POTENTIAL DISRUPTORS

Finance
Sales



OUTLIERS

Human Resources
Business Operations



CRITICAL SUPPORTERS



MARKETING

ENGINEERING

When we think of the teams that product managers depend on most significantly to achieve success with their products, we likely think about the roles which are classified here as critical supporters. These are roles that are closely aligned to the work of the product manager in both form and function. They are roles that either depend directly on the work of the product manager and/or upon whom the product manager directly depends in order to succeed.

IDENTIFYING CRITICAL SUPPORTERS

Of all of the different classifications in this model, the critical supporters are among the easiest to identify, because the product manager will be working very closely with them almost all the time, both feeding them necessary information and using work and information from them to move the product forward.

These are teams who work so closely with product management that their mutual success is entirely dependent upon each other. Take, for example, the marketing team—without proper communication and documentation from the product team, marketing can't do their job. Similarly, without press releases, event appearances, and demand generation, whatever problems product management solve will never find their customers. The primary indicator of a critical supporter is the combination of closely intertwined workflows and closely aligned functions—where you find those things, you will have found a critical supporter.



Marketing as a Critical Supporter

In order to deliver a product to market, there's probably no single team within the company that a product manager depends on more than marketing. They are in charge of so many customer touchpoints we rely on in bringing our solutions to the people who want them—press releases, sales collateral, print and online advertising, event and exhibit space, demos...the list goes on and on. This is particularly so in B2C contexts, as marketing is often the “owner” of the customer relationship within the organization—contrasted with sales having that role in most B2B contexts.

Without these efforts to ensure that our products have visibility in the market, it would be near impossible for us to build the critical mass of adoption that our products need to succeed. But, none of these things can happen in a vacuum—marketing in turn relies directly on product management for problem/solution statements, release note overviews, even active participation in webinars and internal training. Marketing is an essential partner to product management, and one of the most obvious examples of a *critical supporter*.

The inverse is also true, however—marketing cannot do its job effectively without the direct involvement of the product team. They can't create collateral out of thin air; they can't position the product without understanding the problems it's intended to solve; and in the modern era, the **product itself** must be marketing material. No longer can a product

exist as a rough-hewn tool without polish or empathy. In a world where there is an app for everything, the product itself is a message that must be built in collaboration with those whose responsibility it will be to bring that message to life.

“

The aim of marketing is to know and understand the customer so well the product or service fits him and sells itself.

PETER DRUCKER



GOALS & RESPONSIBILITIES

- Primarily charged with generating demand and developing and managing a sales funnel—identifying and qualifying prospects from initial impression to final sale.
- Also responsible for maintaining and managing the brand identity of the company in the marketplace—brand voice, appearance, and expression across different content vehicles: press releases, website content, social marketing, events.
- May be responsible for preparing training materials and collateral for sales teams or even customers and prospects.
- Competitive intelligence and market analysis—knowing who is in the market, where the market is going, engaging with industry analysts (Gartner, Forrester, etc).

NEEDS FROM PRODUCT MANAGEMENT

- Timely updates on product releases, including feature contents of those releases.
- Feature/benefit overviews for each major improvement being delivered.
- Competitive differentiation for improvements being delivered.
- Collaboration in creating and reviewing product marketing materials.
- Support for event appearances, product demonstrations, and other live events.





COMMON ALIGNMENTS

- Establishing target market segment(s), pains, and use cases for the company and product.
- Identifying key personas for marketing and product development.
- Driving product adoption through the sales funnel.
- Creating a strong brand voice that drives awareness and interest for the company and products.
- Delivering new problem statements and identifying new market segments.
- Creating compelling product positioning, messaging, and value propositions.
- Understanding the competitive landscape, and core product differentiators.



COMMON MISALIGNMENTS

- Demand generation activities may not be timed with product release schedules.
- Content created may not accurately reflect the capabilities of the product being developed.
- Pre-marketing efforts may require content that is not yet available (screenshots, fixed scope statements, etc.).
- Time from completion of development work to product launch may be too compressed.
- Ownership and definition of customer personas for marketing may differ from those used in product discovery and development.
- Lack of product marketing support can lead to product managers creating their own “shadow” marketing, sometimes wildly off-brand and off-message.

WAYS TO CREATE ALIGNMENT

- **Be proactive**—hold regular update meetings with marketing staff to maintain alignment.
- **Provide detailed documentation** when required, offer to review drafts of marketing collateral.
- **Engage on social media** where appropriate and productive.
- **Actively participate in marketing tactics**, and not just as a subject matter expert—speak on webinars, author content, present and demonstrate at events, and even offer assistance with setup and teardown of event exhibits.



“

Without requirements and design,
programming is the art of adding
bugs to an empty text file.

LOUIS SRYGLEY



Engineering as a Critical Supporter

There is no other team in the entire company that product managers depend more for their overall success than engineering—simply put: without development, there is no product to sell. Engineering teams cover a wide range of capabilities, depending on the company and the product—designers, architects, developers, testers, and operations teams are just a small sample of the most common responsibilities taken on by engineering teams. They bring us the technical expertise to complement our market knowledge—the understanding of what’s possible given the constraints they have to work within, and the drive and determination to deliver the best possible solution that they can.

Engineering teams should be problem solvers, innovation engines, sources of new approaches and ideas that we would never conceive of on our own. No other team in the organization better represents a *critical supporter* this product management alignment model.



GOALS & RESPONSIBILITIES

- Solve valuable customer problems.
- Identify and implement new technology.
- Create a sustainable, supportable technology infrastructure.
- Ensure high quality products and product improvements.
- Advocate for the needs of product architecture.
- Deploy and maintain solutions in SaaS/PaaS/Cloud environments.
- Keep abreast of new or changing technologies and apply them appropriately to products.
- Automate testing and deployment for effective, continuous delivery.

NEEDS FROM PRODUCT MANAGEMENT

- Clear statements of problems to be solved.
- Prioritized backlog of work sufficiently defined to be taken on as needed.
- Timely answers to questions or clarifications on delivery questions.
- Timely review of progress as needed by the development teams.
- Support in communicating scope and timing to stakeholders.
- End user and decision-maker personas.
- Air cover for distractions and escalations from others in the organization.



COMMON ALIGNMENTS

- Delivering a product that solves valuable user problems.
- User-centered design leading to test- and scenario-driven development.
- Delivering product improvements with as little technical debt accumulation as possible.
- Reducing churn and maintaining focus on high-priority work.



COMMON MISALIGNMENTS

- Product managers attempting to define the “how” too narrowly.
- Engineers not understanding user and buyer personas.
- Disputes over architecture or implementation choices made during development.
- Debates over opinion rather than data-driven decision making.

WAYS TO CREATE ALIGNMENT

- **Celebrate successes** and milestones together.
- Explain and **evangelize the goals and vision** of the work to be done.
- **Engage regularly** as a trusted advisor.
- **Participate in agile ceremonies** as a trusted advisor—planning, review, retro, stand-up.
- **Close the loop:** Share adoption information, customer feedback, and successes to validate engineering efforts.

ACCELERATORS



**TECH
SUPPORT**

**CUSTOMER
SUCCESS**

There are many teams in any organization which seem on their surface to be functionally close to product management, but whose work is often largely independent of the day-to-day operations of the product management team. While these accelerators can often succeed on their own merits, it is always a good idea for product management to maintain close alliances with them, as their work can have large impacts on the success of a product in the market.



IDENTIFYING ACCELERATORS

The defining characteristic of an *accelerator* is their independence within the company, particularly from the product management team itself. They tend to have very specific objectives, goals, and KPIs that apply to their efforts but do not cross over onto other teams.

While some of their work may depend on other teams, they can largely sustain and support themselves, especially when provided with the right resources and budget. These are teams who more often provide indirect feedback into the product organization, and who take the results of that organization as they are and work with them as they can.

For example, technical support teams are often almost entirely self-organizing and self-sustaining, and while they can do their jobs better with direct collaboration with product management, they can also often be highly successful with only a modicum of interaction. Technical support teams typically focus their KPIs and metrics around things such as call volumes, wait times, time to resolve, and a narrow view of customer satisfaction—most of which only clearly apply within the world of a support organization.

Similarly, recent years have seen the rise of customer success organizations, which provide a service somewhere between sales and support, helping new customers to achieve success with the product in early days, and ensuring that the concerns of long-time customers are heard and addressed. Their success is measured by customer retention rates, and growth of existing customer relationships. While customer success and product might share a high-level KPI in NPS or other measures of overall satisfaction, the focus of customer success organizations tends to be much more specific than the macro view that product takes—more focused on the individual customer needs than the broader, market-level view of the strategy and tactics of the company, although both organizations are ultimately measured on product revenue.



Technical Support as an Accelerator

Regardless of the name used to apply to the team, there's almost always a group in any organization that's tasked with addressing customer-originated reports of product problems. Whether that role takes the form of a call center, an online forum, email- or ticket-based systems, or even in-the-moment chat, this team is essential to the success of the organization and a source of great customer input, but largely operates on its own.

When provided with the right resources and budget—trainers, technical writers, escalation tiers, etc—technical support teams can be highly self-sufficient and operate with their work streams, technology, and overall workflows independent of others in the organization, including product management. That said, the information that they obtain from customers is a gold mine of product ideas, feature requests, issues, and shortcomings—directly from the mouth of the customer. Particularly when support teams are given the tools and motivation to collect data in a structured and detailed format, they can be an essential resource for product teams to leverage. It is for this reason they're classified as an *accelerator*—though they act largely independent of the product team, their outputs and insights can significantly improve the work done by the product team when appropriately leveraged.

“

Your customer doesn't care how much you know until they know how much you care.

DAMON RICHARDS



GOALS & RESPONSIBILITIES

- Provide responsive support to new and existing customers.
- Document reported issues for future analysis.
- Maintain high levels of customer satisfaction and confidence in the product.
- Escalate issues with common patterns or high impact into prioritization and planning.
- Manage to commonly-accepted support KPIs and OKRs.

NEEDS FROM PRODUCT MANAGEMENT

- Detailed information about upcoming releases—training, documentation, previews, FAQs—equipping technical success reps to handle customer questions.
- Visibility into known product issues, open bug reports, and available work-arounds.
- Availability for consultations/help on high-profile or high-impact issues.
- Means to escalate major issues or concerns into prioritization & planning.
- Clear articulation of vision and strategy, and insight into prioritization decisions.
- Visibility into how bug reports are triaged and timelines for fixes.





COMMON ALIGNMENTS

- Focus on solving customer issues through product improvements.
- Goals often center around customer satisfaction and retention.



COMMON MISALIGNMENTS

- Very strong micro focus on specific customers, and specific issues can lead to pressure on product management to prioritize changes for minor edge cases.
- Support is not always given an adequate voice at the table in strategic and tactical planning.
- KPIs can drive support teams to not obtain detail necessary for deep data analysis.
- Support is not always provided with clear vision and understanding of prioritization decisions.

WAYS TO CREATE ALIGNMENT

- **Give support a clear voice at the table;** ensure their concerns are heard in prioritization and planning processes.
- **Sit in with the team** on occasion, listening in with or collaborating with team members.
- Take time to **understand the processes** and tools that are used by the team.
- **Prioritize investments** based on support tickets for highest LTV customers.



“

To keep a customer demands as much skill as to win one.

AMERICAN PROVERB

Because these teams typically engage with customers immediately following the sale of a product, platform, or service, they tend to operate independently of other teams in the organization. They are still a font of knowledge about how customers interact with the systems that we build as product managers, similar in some ways to support but often with a very different angle—while support is helping customers with their problems, customer success is very often engaged directly with the customer to avoid problems in the first place.

These teams tend to be high-touch in initial implementations, particularly in B2B contexts, and maintain open channels of communication with customers as the services side of the engagement winds down and hands the reins over to the customer themselves. At the same time, customer success has long-term goals with our customers and our users, beyond just the initial implementation—they act as trusted advisors throughout the customer lifecycle to ensure high levels of customer adoption, satisfaction, and ultimately retention. This is particularly important when new product features or capabilities are released, as the high-touch approach that customer success provides can allow us early insight into any iterative changes that might be needed. Customer success can be an exceptionally powerful partner, and act as an accelerator to our product team goals.

Customer Success as an Accelerator

Although a relatively new role in organizations, the concepts and building blocks of the customer success organization have existed in organizations for decades—implementation teams, service organizations, even pre-sales and post-sales technical teams. These separate functions have begun to be folded into a single structure in recent years, combining all of these independent teams under one umbrella of “customer success.”





GOALS & RESPONSIBILITIES

- Engage with customers early and often to set them up for long-term success.
- Manage customer relationships after sales has completed their work, throughout the lifecycle of the customer.
- Identify and engage at-risk customers to prevent churn.
- Identify and close opportunities for customer growth or upsell.
- Assist customers with initial integration work, proofs of concept, and user acceptance testing.
- Escalate issues from customers into prioritization and planning efforts.

NEEDS FROM PRODUCT MANAGEMENT

- New release preparation—training, documentation, previews, FAQs.
- Access to known issues and workarounds.
- Consultations on high-profile or high-impact issues.
- Means to escalate major issues or concerns into prioritization & planning particularly based on LTV.
- Clear articulation of vision and strategy, insight into prioritization decisions.





COMMON ALIGNMENTS

- Focus on the successful implementation and use by the customer.
- Clear understanding of the differences between buyer personas and end-user personas.
- Establishment and maintenance of long-term successful customer relationships.



COMMON MISALIGNMENTS

- Very focused on individual cases or certain profiles of customers.
- May take short-term shortcuts to satisfy customers with long-term negative effects.
- Customer success teams with their own technical resources sometimes make product changes that are not clearly communicated, documented, or reviewed with the product team.
- Without clear understanding of priorities, can make promises to customers that don't align with product management's plans.
- Poor communication or training on new features can inhibit customer adoption.

WAYS TO CREATE ALIGNMENT

- **Join customer update calls** or on-site visits.
- **Ensure that issues or concerns are heard and escalated** into prioritization and planning.
- **Understand the processes, services, and tools** used by the customer success teams.
- **Actively engage** on proofs of concept or other technical work being done to support customers' goals.
- **Share insights** into highest LTV customers, segments, and personas.

POTENTIAL DISRUPTORS

In any given organization, there are bound to be teams that are largely independent of the product management role from a day-to-day execution perspective, but whose decisions and influence in the organization can indirectly affect the success of the product team's efforts. These potential disruptors pose a risk of disruption to the work that any product manager is doing, due to their outsized influence on the organization and their seclusion from the product organization. They are roles that do not depend significantly on the work a product manager might do, but whose decisions can dramatically change the landscape through which the product team navigates in the organization.





IDENTIFYING POTENTIAL DISRUPTORS

There are two primary characteristics that help us to identify a team as a *potential disruptor*—the amount of influence they have within the organization, and their isolation in the reporting structure from the product team itself. The “further” away a team is from product in the org chart, and the more impact that they have on the bottom line of the company itself, the more likely that team is to be considered a *potential disruptor* for purposes of this model.

These teams tend to have very clear and rational KPIs which leave very little room for maneuvering—such as variable compensation plans for sales teams, as they usually encourage one thing: sell more, no matter what the cost. These KPIs may seem to be aligned with the goals of the product team on the surface, but they can also lead to behavior that results in significant divergence from the plans of the best product manager.

Potential disruptors are those who place limits on the work the product team wants to do, sometimes without understanding why it needs to be done; they are teams who “go rogue” and promise customers features or capabilities that aren’t in the product yet, or possibly even in development. They are the teams whose daily activities in pursuing their own goals and KPIs can severely disrupt the best laid product plans. The examples that we’ve chosen for this classification are finance and sales—two very common *potential disruptors* with whom product managers need to build strong and reliable relationships to minimize the impacts of unaligned and siloed decisions.

Product management alignment with these roles is real “hero work”. There’s not a lot of immediate return on energy expended with *potential disruptors*. The rewards are realized by risk mitigation - avoiding the disproportionate negative impacts these teams can have.



Finance as a Potential Disruptor

A great many product managers never interact meaningfully with their finance team—outside the submission of expense reports, and the receipt of their regular paychecks. This isolation is largely driven by a lack of common experience or common workflows, as finance sits in the “back of the house” and largely appears to just keep things running. However, this is a risky proposition for product managers who become complacent about the finance team during good times, as it’s when things start going south that the finance team can quickly become a major disruptive force in the organization.

When costs exceed acceptable thresholds, or revenue growth slows or declines, it’s often the finance team who knows first and become responsible for exerting pressure throughout the organization to remedy the situation. Product managers who ignore finance, and let them rest in their shadows of the back office run a very real risk of losing out when costs begin to be cut.

When there is a gulf between these teams, product and its related teams can often be seen as liabilities rather than assets—and when that’s the case, they’re often the first targets of cutbacks and cost reductions (aka: layoffs). A product team that takes time to cultivate a strong working relationship with finance is more likely to have a voice at the table during such discussions, and can better position the value of the product and development resources to the organization as a whole. Such strong relationships create a less adversarial context when such difficult decisions need to be made for the good of the company.

“

Don’t tell me what you value,
show me your budget, and I’ll tell
you what you value.

JOE BIDEN



GOALS & RESPONSIBILITIES

- Manage and maintain the financial stability of the company.
- Minimize costs and maximize profit when reasonably possible.
- Review and approve department and project budgets.
- Manage payments to vendors and contractors.

NEEDS FROM PRODUCT MANAGEMENT

- Clear understanding of product vision and strategy.
- Visibility and input into product pricing and packaging plans.
- Business cases that define the expected revenue goals, costs, and ROI for planned work.
- Consultation on product-related expenses.



COMMON ALIGNMENTS

- Creating profitable products that contribute to the bottom line.
- Fiscal accountability, and operating within planned budgets for product development.
- Maintaining strong, ongoing customer relationships.



COMMON MISALIGNMENTS

- Cost-cutting without context of product impacts.
- Finance tends to be wary of risk and uncertainty.
- Decisions can be made based on financial considerations, not customer needs.
- Finance dictating pricing, packaging, or license arrangements that detract from or conflict with the value of the product.

WAYS TO CREATE ALIGNMENT

- **Quantify ROIs as clearly as possible**, whenever possible.
- **Be clear and upfront about risks**, uncertainties, and assumptions.
- **Work with finance teams ahead of time** to understand motivations.
- **Share product KPIs and OKRs** with finance teams, so they understand your motivations.



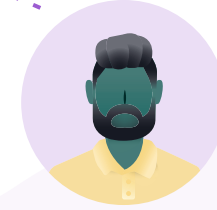
Sales as a Potential Disruptor

Although many product managers work closely with their sales organization, the placement of that team within the organization is often isolated and siloed away from product or even other teams (with the usual exception of marketing). Sales usually has one, very clear goal: to sell the product. And, they often do so however they feel is the best, most effective way—even when that might conflict with the goals of other teams.

For the most part, this often works out—and when it does and revenue is rolling in, very few people will stand up to challenge what the sales team is doing. Unfortunately, when left unchecked this type of sales team will wind up being an exceptionally difficult *disruptor* to the efforts of the product team.

These sales teams will promise customers capabilities not in the product yet, and perhaps not even in development. These sales teams will escalate customer issues that are isolated and difficult to reproduce, but which have the lure of a deal or a renewal attached to them. These isolated sales teams can be the bane of the product team's existence—but fortunately, these teams can be reined in.

Building a strong and trusted relationship with your sales team is essential to the ongoing success of any product manager; balancing the urgency presented by the sales team with the importance of maintaining ongoing product development is an art unto itself.



“
I like to think of sales as the ability
to gracefully persuade,
not manipulate, a person or
persons into a win-win situation.

BO BENNETT



GOALS & RESPONSIBILITIES

- Drive recurring revenue for the company.
- Maintain ongoing relationships with prospects and customers.
- Progress prospects the sales funnel and defend against competitive loss.

NEEDS FROM PRODUCT MANAGEMENT

- Technical training and release preparation for new product/feature rollout.
- Consultations on pending sales or renewals, RFP responses.
- Ability to escalate issues presented by key accounts.
- Availability to discuss the roadmap or product plans with prospects.





COMMON ALIGNMENTS

- Building and maintaining strong customer relationships.
- Identifying new product requirements raised by prospects.
- Visibility into why deals are won/lost - especially with regards to missing features and competition.
- Closing new sales and ensuring renewals of existing customers.
- Maximizing conversion through the sales funnel.
- Responding quickly and definitively to customer questions, concerns, and issues.



COMMON MISALIGNMENTS

- Closing the sale at all costs.
- Lack of deep product understanding, leading to misstatements of capabilities (intentional and unintentional).
- Heavy focus on large, high-value deals regardless of whether the product is capable of supporting these customers or not.
- Over or under-sharing of roadmaps or development plans without context.

WAYS TO CREATE ALIGNMENT

- **Work closely with sales** on demos, technical overviews, training, and collateral.
- **Offer to help with demos** and technical questions on sales calls.
- **Assist sales with training and pitching** by reviewing collateral and other materials they develop for their own use.
- **Volunteer to role-play** as a prospect during sales training.
- **Demonstrate your ability to just listen** as a “fly on the wall” in customer/prospect meetings.

OUTLIERS

While there are many teams that contribute directly or indirectly to the success of the product, there are also many teams who contribute more to the success of the business as a whole, and whose contacts and overlaps with the product manager are limited. We've chosen to describe these teams as outliers—while they may occasionally have impacts on the teams working to deliver product to market, their primary roles, concerns, and day-to-day work happen almost entirely siloed away from that work.

Outliers are necessary for the success of the ongoing operations of the business, but only occasionally overlap with the needs and work of the product team as a whole. It's always a good idea as an employee to understand what these teams do, and to have a relationship with the people who perform them, but they are likely to be the least impactful on a day-to-day basis on the efforts of the product manager or product team.



HR

OPERATIONS



IDENTIFYING OUTLIERS

The basic rule for finding outliers is to look for teams which are neither functionally close to the product team, nor who create dependencies for the success of the product team's daily work. It can sometimes be tricky to determine whether a given team is a *potential disruptor* or an *outlier*, as the ebb and flow of influence, control, and actual impacts can put a given team right on the boundary between the two.

We've chosen two examples for *outliers*, based on general trends and organizational structures that are common in the software development industry—human resources and business operations. Both of these teams are entirely essential to the day-to-day success of the business as a whole—but both of them operate almost entirely independent of the product team, with completely different KPIs, OKRs, and even operational goals. While there is occasionally overlap—hiring a new product manager, dealing with HR issues within the product team, needing some purchase approved—these are isolated and specific situations which generally have limited effects on the overall success of the team.

“

Train people well enough so they can leave. Treat them well enough so they don't have to.

SIR RICHARD BRANSON

Human Resources as an Outlier

Aside from hiring, onboarding, professional development, and performance reviews, it's rare for a product manager to interact with the human resources team—unless they've done something wrong. And aside from the function of pre-screening new hires, the impacts that the HR team itself has on the product team as a whole tend to be very minimal, very localized, and very procedural.

At the same time, having an effective and professional human resources team is absolutely essential to the success of the overall organization. It's important to have well-developed policies for acceptable behavior, to provide opportunities to engage socially with others in your organization, to grow in our careers and knowledge, and to mitigate risk and facilitate resolution of issues between individuals in the company. As an outlier, we look at human resources as a highly independent team in the organization, one who works in the back-office to ensure stability in the organization as a whole. Now, this may sound like you don't need to build a relationship with the human resources team—and while that may be true strictly from the point of view of your day-to-day job—it's certainly not true as an employee of any company.

Perhaps the most important aspect of the relationship that a product team can focus on in building and leveraging a strong relationship with their human resources department is to focus on career and professional development. Most human resources teams have a large toolbox of development options that they can make available to the product team, which opens the door to increased technical, operational, or even market knowledge that can have tangible impacts on the overall performance of the product team.





GOALS & RESPONSIBILITIES

- Ensure that qualified candidates are presented to teams for open positions.
- Provide education on benefits and manage enrollment periods and deadlines.
- Track and document reports of violations of company policy.
- Mediate disputes between employees of the company, at all levels of the organization.
- Provide opportunities for career and professional development throughout the organization.

NEEDS FROM PRODUCT MANAGEMENT

- Timely delivery of structured yearly or quarterly reviews.
- Honest feedback on candidates presented for open positions.
- Open disclosure of questions, concerns, or issues related to HR.
- Recommendations and referrals to keep the talent pipeline full.



COMMON ALIGNMENTS

- Hiring qualified candidates who are onboarded quickly.
- Ensuring scheduled reviews happen efficiently and with little impact.
- Providing training options to expand the team's capabilities.

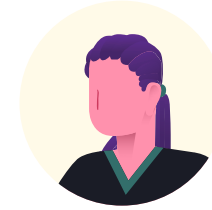


COMMON MISALIGNMENTS

- Misunderstanding of the role or definition of product management.
- Lack of clear objective measures of performance as a product manager.

WAYS TO CREATE ALIGNMENT

- **Volunteer to assist** with event planning or delivery.
- **Offer to review materials** before delivery to the rest of the organization.
- **Provide feedback** and participation in HR-related work quickly and with detail.



Business Operations as an Outlier

The team that is likely the most remote from the product team on a daily basis are those who work in the back-office and work out all of the logistics of running the business on a day-to-day basis. The administrative assistants, the office managers, the corporate IT staff—all of these people work hard every single day so that others in the organization don't need to concern themselves with the things that they do.

We see them every day, and interact with them often—but not in a way that severely impacts our ability to deliver the product improvements that we need for the market. Without them, we'd likely be entirely incapable of doing so, but with them we can sit back and connect to our webconference provider, grab coffee in the lunchroom, and know that the people who replied to our meeting will be there. They are the teams who make sure that the trains are running on time, an essential component to the business itself, but they have very little impact on our day-to-day work in delivering new product to the market.

This isn't to say that we shouldn't build relationships with them—in fact, as an employee who will someday need the IT help desk to help us out with an urgent problem it's essential that we do have relationships with these folks. But, we're not doing so as a direct effort to deliver product, but as an indirect means to simply do the jobs that we're hired to do. A truly great product manager understands the value that every employee brings to the table—whether they directly contribute to the success of the product team's work, or only do so indirectly. The value of a relationship with an outlier team lies not in what they can do for your product, but what you may need them to do for you as an employee.

“

A company can seize extraordinary opportunities only if it is very good at the ordinary operations.

MARCEL TELLES



GOALS & RESPONSIBILITIES

- Ensure the smooth operation of the business on a day-to-day basis.
- Be responsive to requests for assistance or reports of issues.
- Timely resolution of problems based on priority and severity.
- Manage work that others have delegated to them.

NEEDS FROM PRODUCT MANAGEMENT

- Reporting of issues or problems as they arise.
- Understanding of priority and severity decisions.
- Understanding the facilities and tools needed for the product team to operate effectively.
- Evangelize the role that the teams play in the success of the business.





COMMON ALIGNMENTS

- Keeping the business trains running on time.
- Maintaining IT systems that support software delivery.



COMMON MISALIGNMENTS

- Unreasonable expectations on escalated issues or problems.
- Lack of understanding of the importance of business or technology issues reported to them by the product team leading to lack of responsiveness.

WAYS TO CREATE ALIGNMENT

- **Get to know the team members** personally, at least by name.
- **Clearly communicate the priority** and severity of issues reported or escalated.
- Try to **self-serve as much as reasonably possible** without harm before escalating.
- **Be understanding** about competing priorities on the other team's side.



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If we have data, let's look at data.
If all we have are opinions,
let's go with mine.

LOUIS SRYGLEY

C-Level Executives

Sitting at the top of every organization is a group of people who hold the future of the company in their hands. These are the people who decide the vision of the company, the strategy for the future, and guide the tactical execution that every other person in the organization aligns with. By very definition, the C-level executives of any organization are different from other employees—they have greater responsibility, greater authority, and greater influence than almost anyone else in the company. The challenges that a product team may have in influencing a C-level executive are very different from those we encounter with other teams in the organization.

Rather than influencing peers, or lateral supervisors, when dealing with the C-level team we're dealing with people whose words and actions set the tone for the entire organization. If we can successfully influence them, we have the biggest and best ally on our side; if we fail at influencing them, however, it can be a misstep that may be difficult to recover from. Working with C-level executives is not always difficult or scary—but it is always a high-stakes game that is very different in nature and approach than influencing other teams in your organization. This is why we've set them aside from the model—because they sit above the model, just as in any company they sit above the rest of the company.

THE CEO V. THE ‘CEO OF THE PRODUCT’

One of the biggest myths about product management is that product managers are the “CEO of the product”. This is not a reasonable analogy—the CEO is the CEO of the product, and the company. Consider the following comparisons:

- Product managers cannot make fiat decisions; CEOs can.
- Product managers must lobby for resources; CEOs simply make it happen.
- Product managers influence from the bottom up; CEOs have top-down authority.
- Product managers must strive for consensus; CEOs can make decisions based solely on their opinion.

As you can see, while there are certain **similarities** between the roles, they simply aren’t the same in practice. Product managers do share the responsibility of execution based on other peoples’ work, deep market and customer knowledge gained through direct experience, and are even seen as leaders within the organization by those both above and below them. And while those are certainly qualities that the best CEOs have, they do not truly establish the product manager as “CEO of the Product”—ultimately, the CEO of the company is the CEO of the product.

LEADING UPWARD THROUGH INFLUENCE

While there is some amount of art involved in leading through influence generally, leading *upward* through influence takes that art to the next level.

It requires a deep understanding of the culture of your organization, the politics and personalities involved in decision-making, and establishing a reputation of trust and respect that is built over years of hard work and diligence in your work influencing in your day-to-day job.

It’s extremely rare for a newly-minted product manager to immediately have the ear of the C-level team in a way that provides them the freedom to do the things they want with a minimum of oversight and interference. Rather, it’s far more likely that early-stage product managers are going to be dealing with specific input from this level that will need to be understood and balanced with the personal decisions that the product manager may wish to make.

The best tool that any product manager can have to challenge decisions being made above them is data—reliable, significant, and customer-oriented data. If you as a product manager see decisions that you’re not certain of, it’s up to **you** to obtain the data to challenge it—it’s **not** up to you to demand to see the data underlying the decision from above (hint: there often isn’t much). You need to go out to the market, discuss the product with current, past, and future customers, and generally do the necessary due diligence to either confirm or conflict with the decisions you’re questioning.

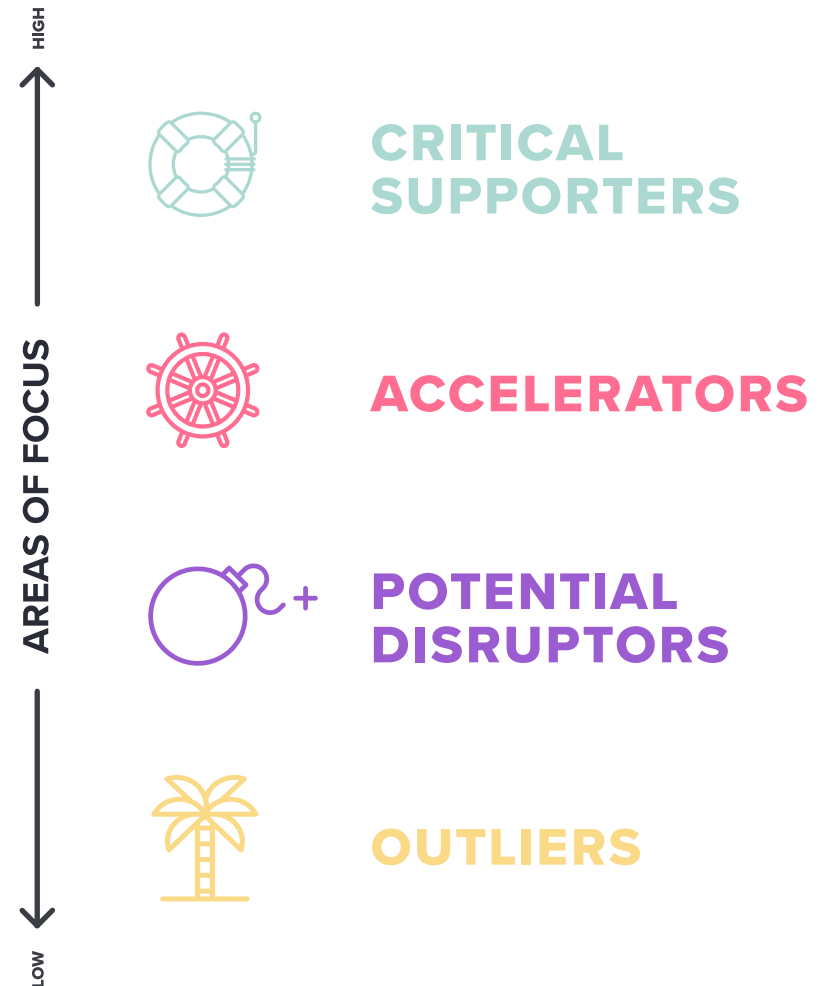
Ultimately it’s **your job** to advocate for the customer—and presenting such data as the true “voice of the customer” makes it nearly impossible to dispute. That’s the strongest position we can have as product managers, and an approach that builds your reputation and influence with your C-level team. Data is the secret sauce that all product managers need to use to influence upward.

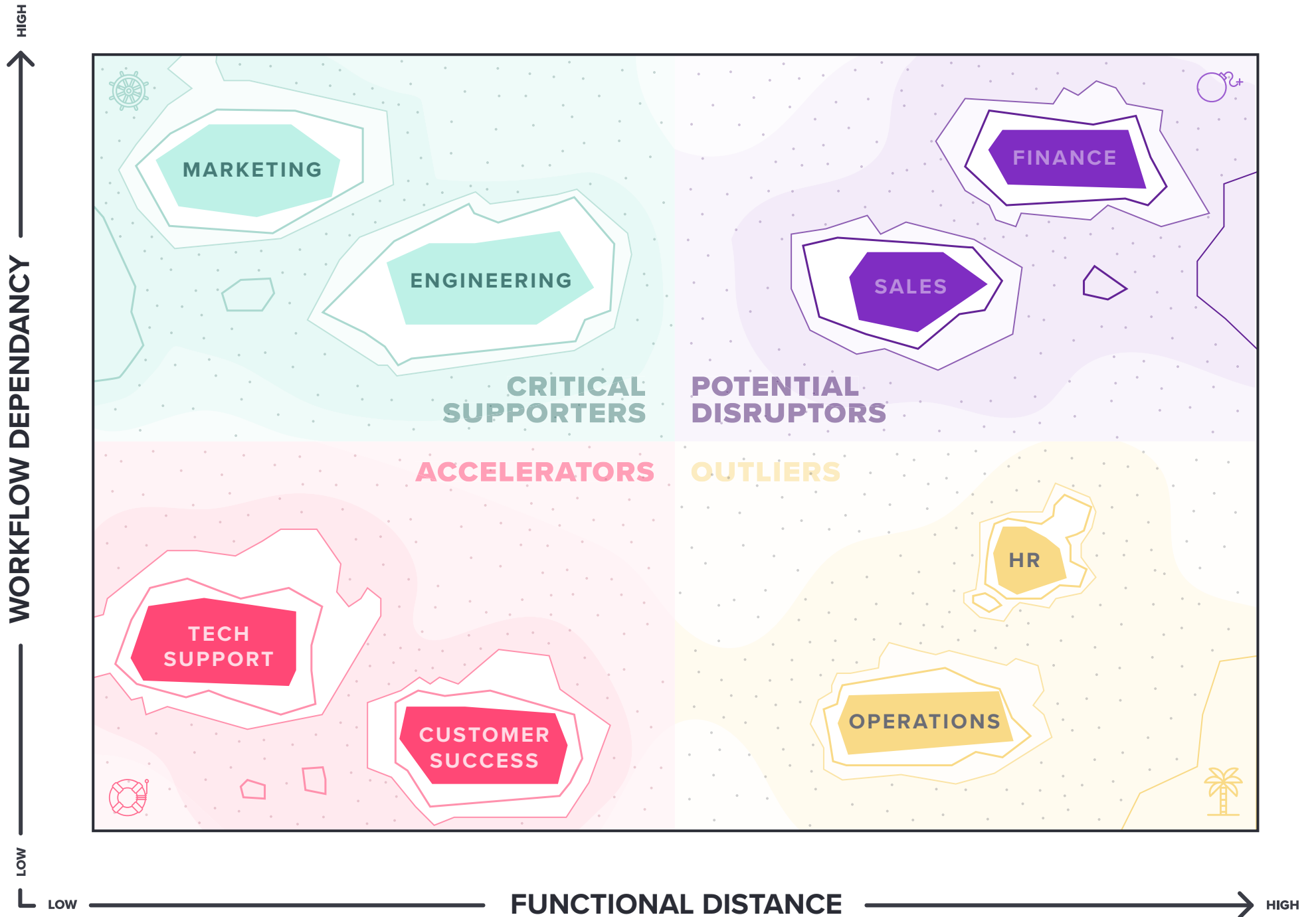
Using the Map

In this map, we've described each axis of influence that every product manager will encounter in some way during their career. While the specific roles as described here may not map perfectly to your organization, the model will assist you in understanding when, where, and how to focus on expanding your influence in your organization.

The first and most important area of focus should be the *critical supporters*, without whom you're unlikely to be successful at your product efforts. Next, we want to extend our circle of influence to those *accelerators* who can assist us when the chips are down or provide us with additional information, confirmation, or suggestions to up our game. After working on influencers, we want to try to capture the attention of any *potential disruptors*, ensuring that we're on their radar as they make daily decisions that might adversely affect us. And finally, we want to ensure that we're not ignoring those *outliers* who provide the unseen support that keeps the business running on a daily basis.

Keep in mind, these aren't necessarily sequential steps, ideally we want to spread our influence throughout the organization in parallel, as we never really know who's going to be consulted or have some indirect influence in our company. Following this model should make our daily decisions about who to engage with, when to engage with them, and how to best engage with them less of a challenge for new product managers or those entering new organizations for the first time.







ABOUT THE AUTHOR

For over 15 years, Cliff Gilley has been a product manager and Agile coach/evangelist at a wide variety of companies across many different industries in the greater Seattle area. He blogs regularly as the Clever PM, teaches Product Management for General Assembly, and is an active board member with the Pacific Northwest Product Management Community. He is also a regular contributor to industry blogs and webinars on topics related to Agile practices and product management.