

ARRO

ARRO LABS

Roadmap Readiness Workbook





ROADMAPS

The Basics



What is a digital roadmap?

A digital roadmap is a comprehensive strategic plan that serves as a vital communication tool across the organization. It outlines key annual themes, aligns business goals with those themes, and identifies the initiatives necessary to achieve them. It should clearly articulate the strategic direction for digital projects, helping to convey the 'why' behind each initiative. By mapping out dependencies and ensuring that every initiative is directly tied to one or more business goals, ***a well-crafted roadmap aligns teams across the organization***, ensuring everyone is marching in the same direction and that risk is mitigated.

On the following pages, you will find additional considerations that are critical to building an effective digital roadmap.

PRODUCT VISION



BUSINESS STRATEGY

USER NEEDS

CROSS-FUNCTIONAL STAKEHOLDER INPUT

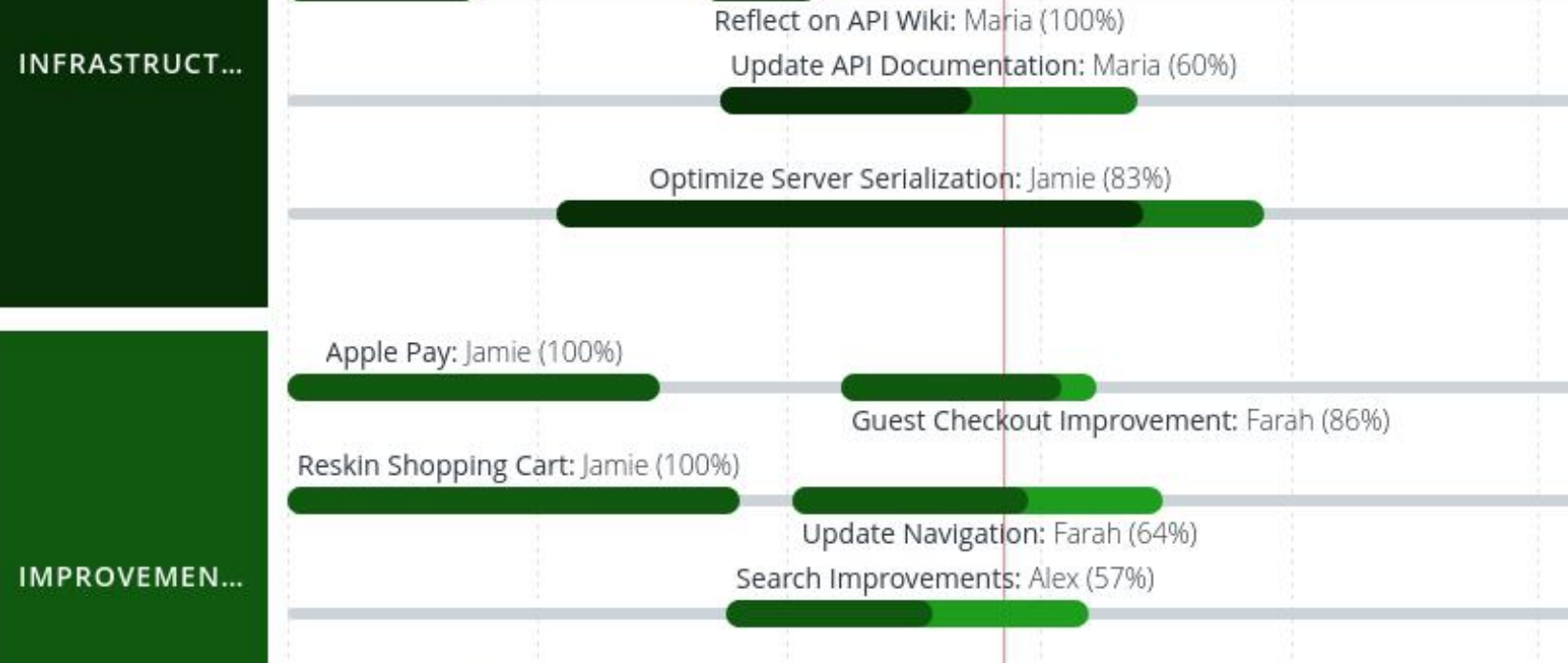
Aligning to your product vision

Your digital roadmap should be anchored in your product vision—the long-term mission that defines your product’s future. The roadmap will chart the course for realizing that vision, but it’s important to consider several additional factors that will influence how you’ll navigate that path successfully.

Two of these considerations are:

- Your company business strategy: what is the business trying to achieve?
- Your product’s user needs: what is your customer trying to achieve?

Try to balance these needs when determining the *how* of your roadmap, as they may not always align. Inputs from cross-functional stakeholders are key to striking this delicate balance.



The many forms of roadmaps

Digital roadmaps are never one-size-fits-all, but there are different templates that can be leveraged and personalized to best meet the needs of YOUR business.

Possible Formats:

- Online roadmapping tool (e.g. [Roadmunk](#))
- Design tool (e.g. Figma)
- Delivery tool integrations (e.g. Jira/Confluence)
- PowerPoint or Keynote slide

Possible Styles:

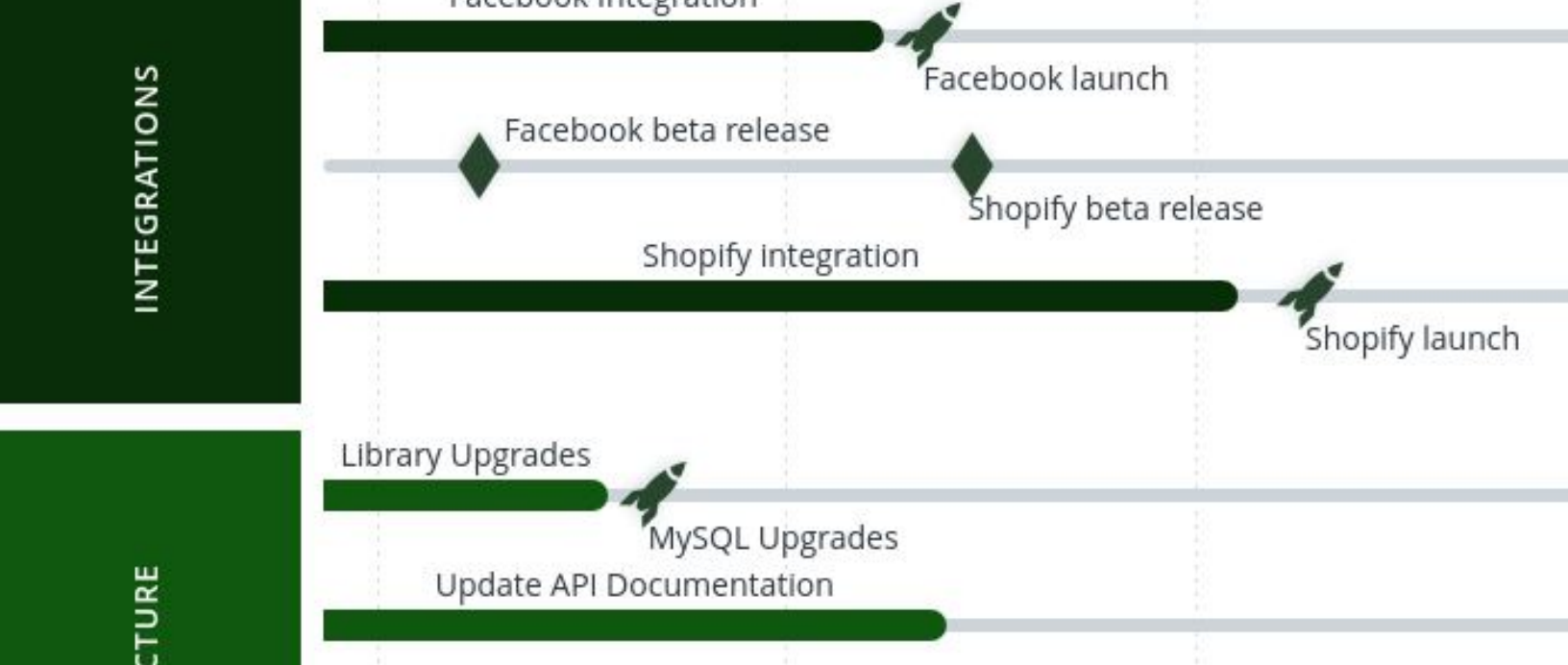
- Timeline-based (1-Year, 3-Year, 5-Year, 10-Year. etc.)
- Theme-based (focuses on strategic themes vs. a timeline)
- Goal-oriented (most effective when tied to OKR frameworks)
- Now/Next/Later (better for small, agile teams)

	Q1 2024	Q2 2024	Q3 2024
MARIA	Database Improvements 100% Responsive eCommerce site 100%	Library Upgrades 89% Update API Documentation 60%	Reflect on API Wiki Language toggle Promo Pop-up
FARAH	Data Dump 100% Two-Factor Authentication 100%	Guest Checkout Improvement 86% Reward (Progress Bar) 95%	Update Navigation 15% Accessible Default Color Palette

What should a roadmap include?

At it's most basic level, a digital roadmap should cover:

- **Business Goals:** What are the defined outcomes your company is trying to achieve over the next 1-5 years?
- **Customer Needs:** An effective roadmap must balance business goals with the customer's needs. What is your sales team hearing? What are customers directly asking for? What does the existing customer data say?
- **Key Themes:** These are likely related to your business goals. They help organize the various ideas into cohesive categories that facilitate communication of the roadmap across the organization.
- **Ownership:** Who is responsible for moving each initiative forward? This doesn't necessarily need to be the project lead, but without an owner it will stall.



Taking it to the next level...

Once you have the basics down, consider adding these items to level-up your roadmap:

- **Value Streams:** This is the cross-functional value based on the customer's journey with the product (e.g. onboarding, features, support, etc.). These are inherently cross-functional.
- **Dependencies:** This is especially important when it comes to IT systems to support roadmap items. List all business-critical IT systems, their current use, and where they are in their lifecycle (e.g., planned, active, end-of-life, etc.).
- **Milestones:** These are the major delivery and/or decision-points along the roadmap.
- **Dreams:** Seriously! A roadmap is a place to dream big. What organizational changes and needs are on the horizon or already underway? Are there opportunities where the right kind of digital transformation could help the organization deliver on its KPIs or other metrics of success? Anything that feels out of reach now, but would move the needle for the business? Write them down.



You need a roadmap if...

- Your organization has many projects running in tandem.
- You often don't know why projects are slowed, stalled, or abandoned.
- You find that important initiatives get underfunded or defunded during capital planning, and you don't know why.
- You don't have insight into the projects that are happening in departments other than your own.
- You have noticed a power struggle amongst stakeholders causing constant shifting priorities and lack of a product vision.

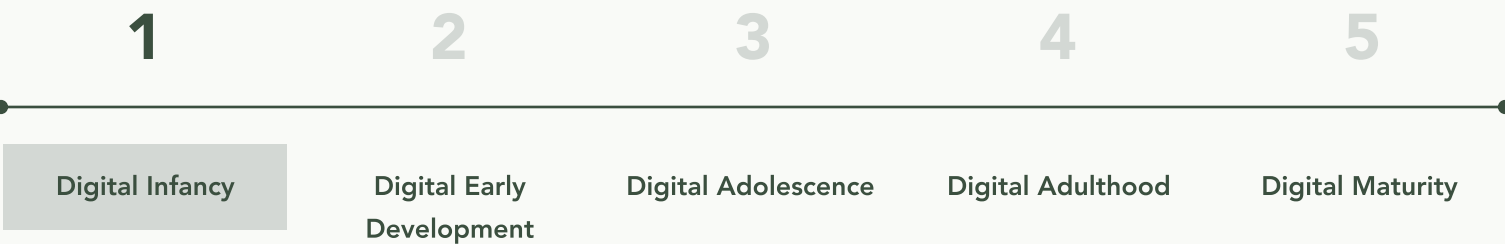


ROADMAPS

Getting Started

ROADMAP READINESS SCORE

Read the following statements and identify where your organization falls.



Digital Infancy

My organization is digitally immature and doesn't understand the need for a roadmap. Departments are siloed and most don't communicate or interact with each other. Projects often go unfunded, stall out, or take longer than anticipated. There is a lack of resources to work on the projects.

ROADMAP READINESS SCORE

Read the following statements and identify where your organization falls.

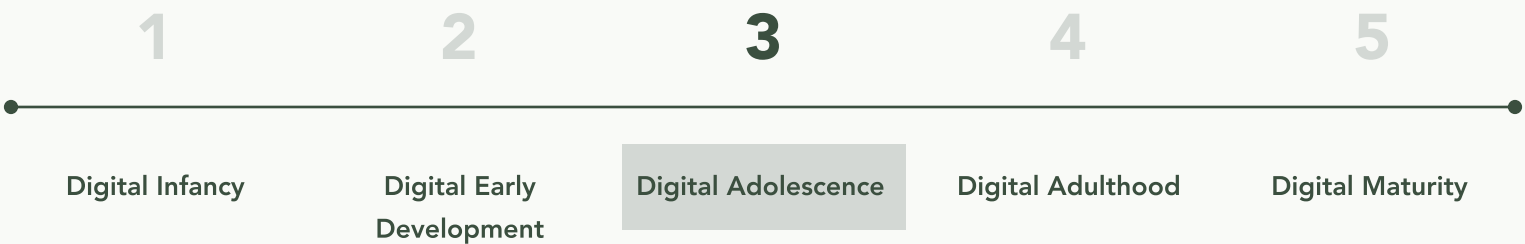


Digital Early Development

My organization is experiencing growing pains. We have too many projects and not enough time or resources to execute them. We often let projects fall off the map. Projects that do get complete are often over time or budget. Departments meet, but are still siloed.

ROADMAP READINESS SCORE

Read the following statements and identify where your organization falls.



Digital Adolescence

My organization is actively trying to create a plan. We have a tentative list of projects in Excel or Powerpoint. It is not updated often but is referred to in capital planning and strategy meetings. Departments communicate their projects with one another occasionally and everyone mostly agrees that we need to put more time into solidifying and updating the roadmap.

ROADMAP READINESS SCORE

Read the following statements and identify where your organization falls.

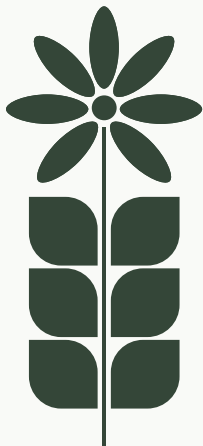
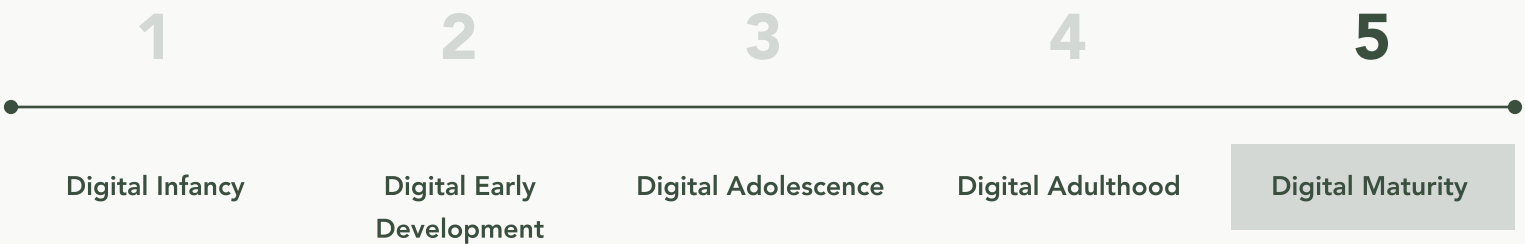


Digital Adulthood

My organization has a digital roadmap. It is updated with some frequency, usually around annual strategy planning. We share the roadmap with vendors/partners to help them better understand project priorities. Our roadmap lacks additional level of detail such as dependencies, and doesn't extend beyond 18 months. Our goal is to have a longer-term roadmap with more detail, that is updated in real time.

ROADMAP READINESS SCORE

Read the following statements and identify where your organization falls.



Digital Maturity

My organization has a 3-5 year digital roadmap with a high level of detail including dependencies, notes, examples and assigned leaders for each project. We use the roadmap on a weekly basis to keep track of work, and for budget planning purposes. It is referred to and updated in real time, and is actively helping us achieve our business goals.

If you have a score of 1 or 2:



Helpful Tip

At big companies, you often have overlapping or even competing projects due to their siloed nature, leading to a shocking amount of wasted effort. A well-executed digital roadmap ignores functional departments and focuses on value streams, which requires input from stakeholders outside of your department. At this stage, the more people you involve, the better.

- ☐ Identify key leadership from each practice that should be involved in creating a roadmap (e.g. tech, finance, marketing, sales, etc.).
- ☐ Ask each department to document the projects they are actively working on and any projects planned for the next 3 years.
- ☐ Identify who can facilitate roadmapping discussions and a workshop.
- ☐ Choose which tool you will use for roadmapping and get IT/security and leadership buy-in; purchase the tool license.
- ☐ Set a date for a roadmapping workshop.
- ☐ Determine the roadmapping workshop agenda.
- ☐ Participate in pre-workshop stakeholder interviews.
- ☐ Hold the roadmapping workshop.

My Notes

If you have a score of 3 or 4:



Helpful Tip

A roadmap isn't "set it and forget it." It should serve as the North Star for strategy, goals, and planning. But as priorities inevitably shift, the roadmap should be adjusted accordingly. Revisit the roadmap often, and plan to do a full, thorough review annually to ensure that the roadmap reflects the organization's new or evolving goals and business objectives, that new projects are added, and that outdated or cancelled projects are removed. In doing so, you'll stay aligned as an organization.

- ☐ Identify the key stakeholders that are in charge of maintaining the roadmap.
- ☐ Identify a roadmapping tool and input information.
- ☐ Establish a regular cadence for meetings to refine the roadmap; at a minimum it should be a monthly meeting.
- ☐ Make sure to bring the roadmap to key meetings to maintain alignment on strategy and to assist with cross-functional transparency.
- ☐ Update the roadmap after any strategy planning sessions.
- ☐ Update dependencies as they arise, and adjust the timing of any impacted projects accordingly.
- ☐ Look at overlaps within each functional area; if there are too many things scheduled to happen at the same time, discuss what should take priority (consider using a prioritization exercise for this).

My Notes

If you have a score of 5:



Helpful Tip

To further refine the roadmap and priorities, try using research and/or metrics to determine how priorities might impact organizational success. Ask yourself: as a business, are we using data to inform what projects we work on and where our funding should go? Or are we making decisions based on our best guesses?

- ☐ Pat yourself on the back; you are ahead of most organizations!
- ☐ Delve deeper into the dependencies associated with each item on your roadmap. Identify the common threads, and understand the full impact of each dependency to ensure proper prioritization.
- ☐ Add additional detail to your roadmap, including key milestones, summary notes on each initiative, and next steps.
- ☐ Create an automated project intake system for adding new projects to the roadmap.
- ☐ Identify areas to display your digital roadmap in the office and/or in a common online space, like an intranet homepage, to foster further transparency and collaboration.

My Notes



ROADMAPS

What's Next?

Time to reflect

We want to empower you to bring your conclusions from this workbook into your organization. Fill out these prompts to help summarize your findings.

What was your score (1-5)?

Based on the score, what do you think are the best next steps to take?

Who would you like to involve in your roadmapping process?

How do you think your company will benefit from having a digital roadmap?



Next Steps:

Depending on what stage you're in, are you seeing any gaps that need to be filled in your digital roadmapping journey?

Do you need outside support either developing your roadmap, managing your roadmap, or implementing some of the digital projects on your wish list?

We'd love to chat and learn more about how we can help. Reach out to us directly at contact@arrolabs.com.

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