

WHAT IS THIS TOOLKIT?

This toolkit gives you a repeatable process for building a product roadmap your team will actually follow. It is not a list of features — it is a decision-making framework. Work through the three pages in order: Instructions (this page), Example (a filled-in sample), then Worksheet (your blank copy to complete).

THE 6-SECTION PROCESS

1 Product Overview

Name, one-sentence vision, target users, and current stage. Everything else in the roadmap must serve this vision. If an initiative doesn't, cut it.

2 Goals & Success Metrics

3 time-bound goals and one North Star Metric. Goals must be measurable. 'Improve the product' is not a goal. 'Reduce onboarding time from 5 days to 2 days by Q2' is.

3 Initiatives & Priorities

8–12 initiatives maximum, each assigned a priority (High / Medium / Low), a delivery quarter, and an owner. More than 12 and it's a wish list, not a roadmap.

4 What's NOT on the Roadmap

Document what you deliberately excluded and why. This is the most underrated section. It prevents the same debates restarting every quarter.

5 Stakeholders & Review Cadence

Who owns the roadmap, who has input, and how often it is reviewed. Monthly reviews are right for most teams. Quarterly is the minimum.

6 Risks & Dependencies

The 2–3 things most likely to cause a slip. Name them early so you can manage them, not discover them when it's too late to recover.

GOLDEN RULES

- ❖ A roadmap is a bet, not a commitment. Communicate it as such.
- ❖ If stakeholders can't see the logic from vision → goal → initiative, the roadmap will not hold.
- ❖ Update the roadmap every 4–6 weeks, not every sprint.
- ❖ Say no to good ideas. Every 'yes' is a 'no' to something already on the list.



EXAMPLE — Client Portal Product Roadmap

Filled-in example showing how a completed roadmap looks.

◆ The team building the work must have input into the roadmap. Roadmaps built in isolation get ignored.

1 — PRODUCT OVERVIEW

Product / Project Name	Sempiterno Client Portal
Vision	Give every retainer client a single place to track deliverables, review reports, and request changes — without email chains.
Target Users	Existing Sempiterno retainer clients — founders and marketing managers at 7-figure eCommerce brands.
Current Stage	Discovery

2 — GOALS & SUCCESS METRICS

Goal 1	Q2 2026 — Reduce client onboarding time from 5 days to 2 days.
Goal 2	Q3 2026 — 80% of active clients logging in at least once per week.
Goal 3	Q4 2026 — Net Promoter Score above 50 from portal users.
North Star Metric	Weekly active clients in the portal
What 'done' looks like	All retainer clients onboarded, weekly logins are the default behaviour, and the support inbox drops by at least 40%.

3 — INITIATIVES & PRIORITIES

Initiative	Description	Priority	Quarter	Owner	Status
Client dashboard — deliverables	Card view showing all active deliverables by status.	High	Q2	Jacob G.	In Progress
Report upload & version history	Clients can view and download any report, any version.	High	Q2	Dev Lead	Planned
In-app change request form	Replace email chains with a structured form.	Medium	Q3	Jacob G.	Planned
Automated weekly digest email	Summary of progress sent every Monday morning.	Medium	Q3	Dev Lead	Backlog
Client usage analytics	Track logins and engagement for internal use.	Low	Q4	Jacob G.	Backlog
Mobile-optimised view	Responsive layout pass for phone and tablet.	Low	Q4	Dev Lead	Backlog

4 — WHAT'S NOT ON THE ROADMAP

Native iOS / Android apps	Web-first covers 95% of use cases. Revisit after the web portal hits 80% weekly active client rate.
AI-generated report summaries	Interesting but speculative. No validated demand yet. Moved to next planning cycle.

5 — STAKEHOLDERS & REVIEW CADENCE

Roadmap Owner	Jacob Gerrish — final call on all priority changes.
Key Stakeholders	Engineering lead, Head of Client Success, Founder.
Review Frequency	Monthly — first Monday of each month. Major re-prioritisation at quarter boundaries only.
How Changes Get Proposed	Any stakeholder submits a request via shared Notion doc. Changes require roadmap owner sign-off.

6 — RISKS & DEPENDENCIES

Risk 1	Auth provider integration may need 3rd-party legal review — buffer 2 weeks in Q2 timeline.
Risk 2	Design resource is shared with another product — Q3 may slip if prioritisation conflicts.
External Dependency	Data warehouse migration (ops team, targeting Q2 completion) must finish before the reporting module can be built.

1 — PRODUCT OVERVIEW

Product / Project Name	
Vision (one sentence)	
Target Users	
Current Stage	

2 — GOALS & SUCCESS METRICS

Goal 1 (Q__ 20__)	
Goal 2 (Q__ 20__)	
Goal 3 (Q__ 20__)	
North Star Metric	
What 'done' looks like	

3 — INITIATIVES & PRIORITIES (8–12 max)

Initiative	Description	Priority	Quarter	Owner	Status

Initiative	Description	Priority	Quarter	Owner	Status

4 — WHAT'S NOT ON THE ROADMAP

Idea / Feature	Reason for Deferring

5 — STAKEHOLDERS & REVIEW CADENCE

Roadmap Owner	
Key Stakeholders	
Review Frequency	
How Changes Get Proposed	

6 — RISKS & DEPENDENCIES

Risk 1	
Risk 2	
Risk 3	
External Dependencies	