INFINITY

THE ULTIMATE PRODUCT MANAGEMENT FRAMEWORK

Complete guide to building the right product

Introduction To Product Management

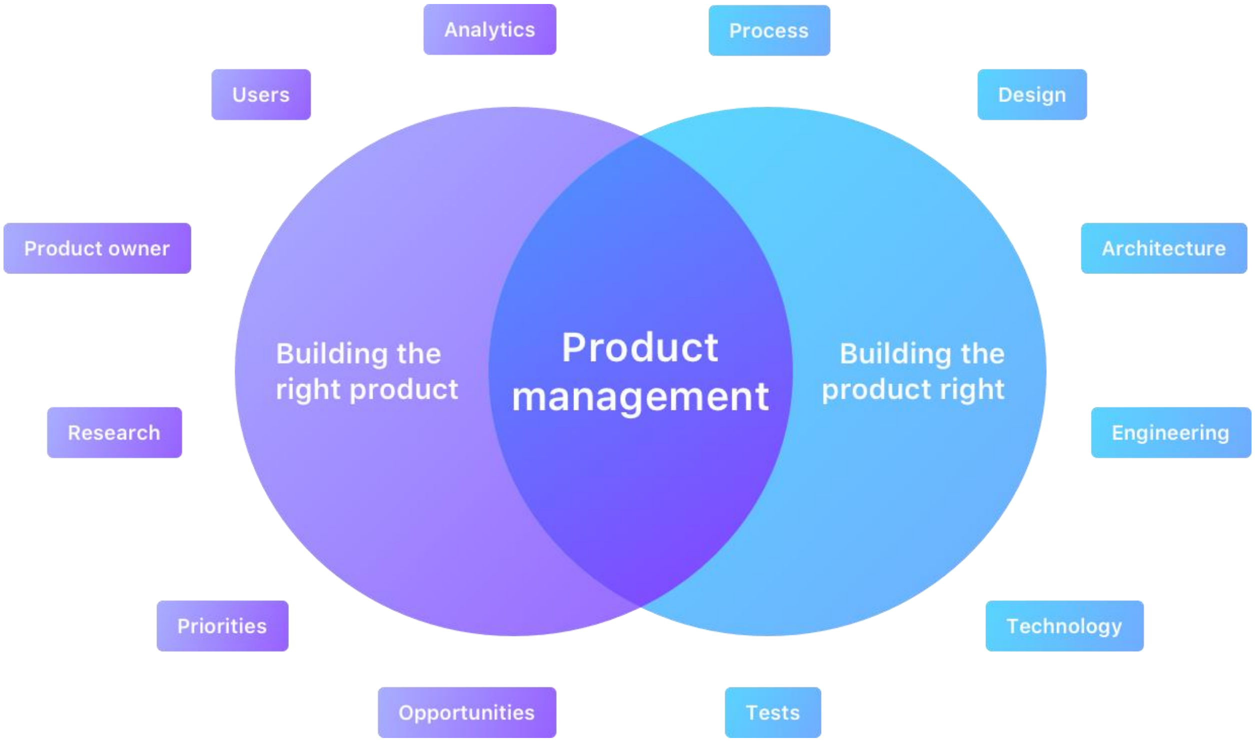
Product management is the practice of planning, developing, marketing, and continuous improvement of a company's product or products.

The idea of product management first appeared in the early 30s with a memo written by the president of Procter & Gamble, Neil H. McElroy, where he introduced the idea of a product manager — a "brand man" completely responsible for a brand and instrumental to its growth.

Decades later, in the 1980s, modern product management started to take shape with the explosive growth of the software market. Since then, product management has been closely connected to and typically found in companies creating software.

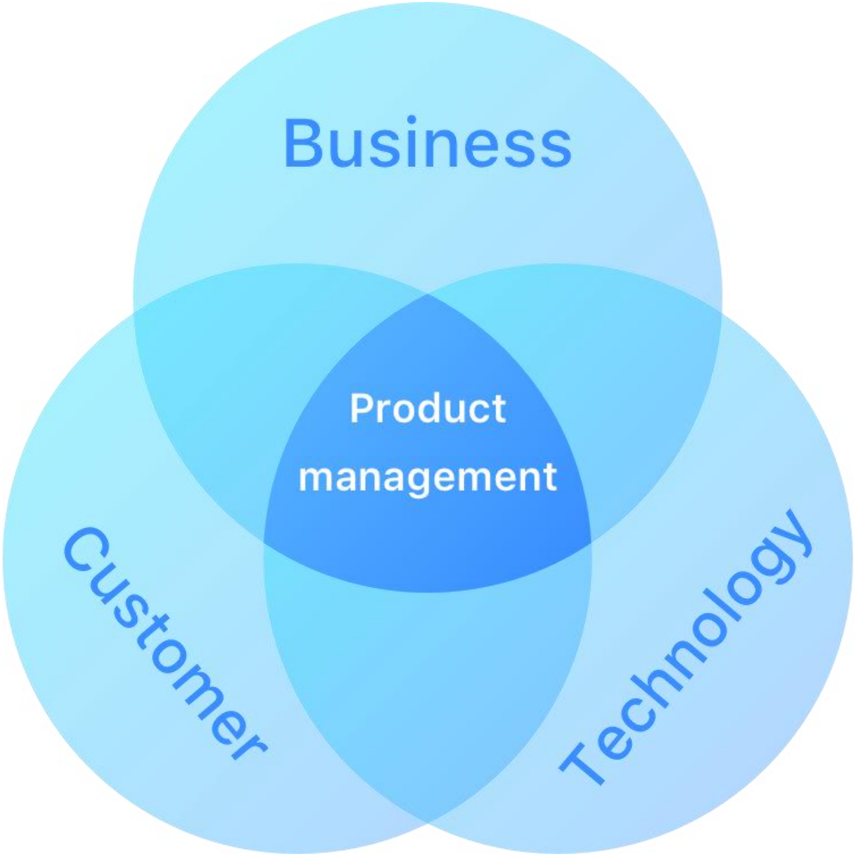
What Is Product Management?

The main objective of product management is the development of a new product. Its ultimate goal is making sure you're building the right product and building the product right.



Most notably, product management means linking the development team on the one side with marketing, sales, and customer success teams on the other side, while ensuring the process is aligned with the business vision.

Product management should translate business objectives into engineering requirements and explain product functionalities and limitations to commercial teams responsible for marketing, sales, and customer communication.



Inbound Vs. Outbound Product Management

Since product management is such a large concept, organizations usually split responsibilities across departments. That's why we can differentiate between inbound and outbound product management.

Inbound product management involves market research, industry trends, and competitive analysis as well as the overall strategy and product roadmap.

Inbound product management responsibilities include:

- Customer research and insights
- Business care analysis
- Positioning

- Product roadmapping
- Market requirements and prioritization
- Whole product definition
- Differentiation and desirability
- Features/cost/schedule trade-offs
- Developing product requirements with engineering and UX
- Competitive analysis (product and market position)
- Beta programs

Outbound product management focuses on product marketing — branding, messaging, positioning, product launches, PR, advertising, etc.

Outbound product management responsibilities include:

- Launch and marketing plans
- Features and benefits
- Messaging by market and role
- Training
- Sales tools
- Product launch
- Marketing program
- Success stories
- Market analysis
- Competitive analysis (price, promotion, and place)

Roles in Product Management

The concept of product management includes many different roles such as chief product officer, director of product management, product manager, product owner, and product marketing manager, to name just a few.

It's important to keep in mind that product management and project management are two different roles.

There can be one person or a whole team in charge of product management. The number of people involved will largely depend on the size of the company. In some cases (for example, in growing startups) one person takes on several different roles — acting as a CEO, product manager, and product marketing manager.

Product Manager's Roles And Responsibilities

A product team without a product manager is like an orchestra without a conductor. Even a group of phenomenal virtuosos would be completely uncoordinated and sound discordant without a conductor to guide and synchronize them.

Much like a conductor, a product manager is supposed to lead a cross-functional product team and coordinate product creation from strategy to execution. A product manager needs to be the leader who will ensure that everyone on the team is working toward the same goal.

To be able to handle such a complex and versatile role, a great product manager should be knowledgeable in several areas, most notably technology, business, and user experience.

What Does a Product Manager Do?

A product manager is responsible for setting a strategic plan for product creation and making sure that the plan is executed. In other words, a product manager is in charge of the following:

- Conducting market research, competitor analysis, and customer research
- Setting a product vision and strategy that states the unique value of the product
- Creating a product roadmap with a clearly defined action plan, defining the responsibilities and the timeline
- Coordinating among design, engineering, and marketing teams
- Owning the Daily Scrum and Sprint Planning meetings, ensuring that all developers understand the user stories and are clear on what needs to be built

- Defining and analyzing product metrics and analytics

Put even more simply, as a product manager, you will have three main responsibilities:

1. Set the strategy and long-term vision
2. Share this strategy with all the stakeholders
3. Oversee the execution of the strategy

Inside A Product Manager's Mind

A great product manager should be the go-to person for all questions related to the product and the linking element of the whole team. That's why they need to be as transparent as possible in the prioritizing process.

Although the product manager will have the final say, it's important to keep all stakeholders in the loop when it comes to making decisions.

Having all the data necessary in one place - or one tool - will make it much easier for product managers to explain why they are prioritizing certain features over others and why they sometimes have to say no.

What Software Should a Product Manager Use?

To be productive in the role of a product manager, you should find the right tools that will make your job easier. Nowadays, there are many product management tools that help you develop your whole product strategy and keep all information in one place.

Here are some product management software features that come in handy:

- **User tracking/analysis** — One of the best ways to get insight into your users ' behavior and the way they react to your product. This way, you can continually improve the product to better fit user needs.
- **Customer survey tools** — Direct customer feedback is invaluable, as you can learn all about the things your users love or hate about a product. Some product management software lets you create survey templates and easily send survey forms to your users.
- **Prototyping** — Get your product on the right track from the first step. Create a prototype you can easily share with the stakeholders.
- **Roadmapping** — A roadmapping tool helps you define features and plan releases, track development status and progress, plan and allocate development resources, and collaborate with your product team.

- **Task management** — Assign tasks to team members and follow task progress in real time, define and prioritize tasks, and streamline your whole task management process.
- **Data management/sharing** — A quality product management tool makes it simple to upload and share documents and data with your team members.
- **Instant messaging** — Be able to quickly contact anyone on the team and get the information you need as soon as possible.

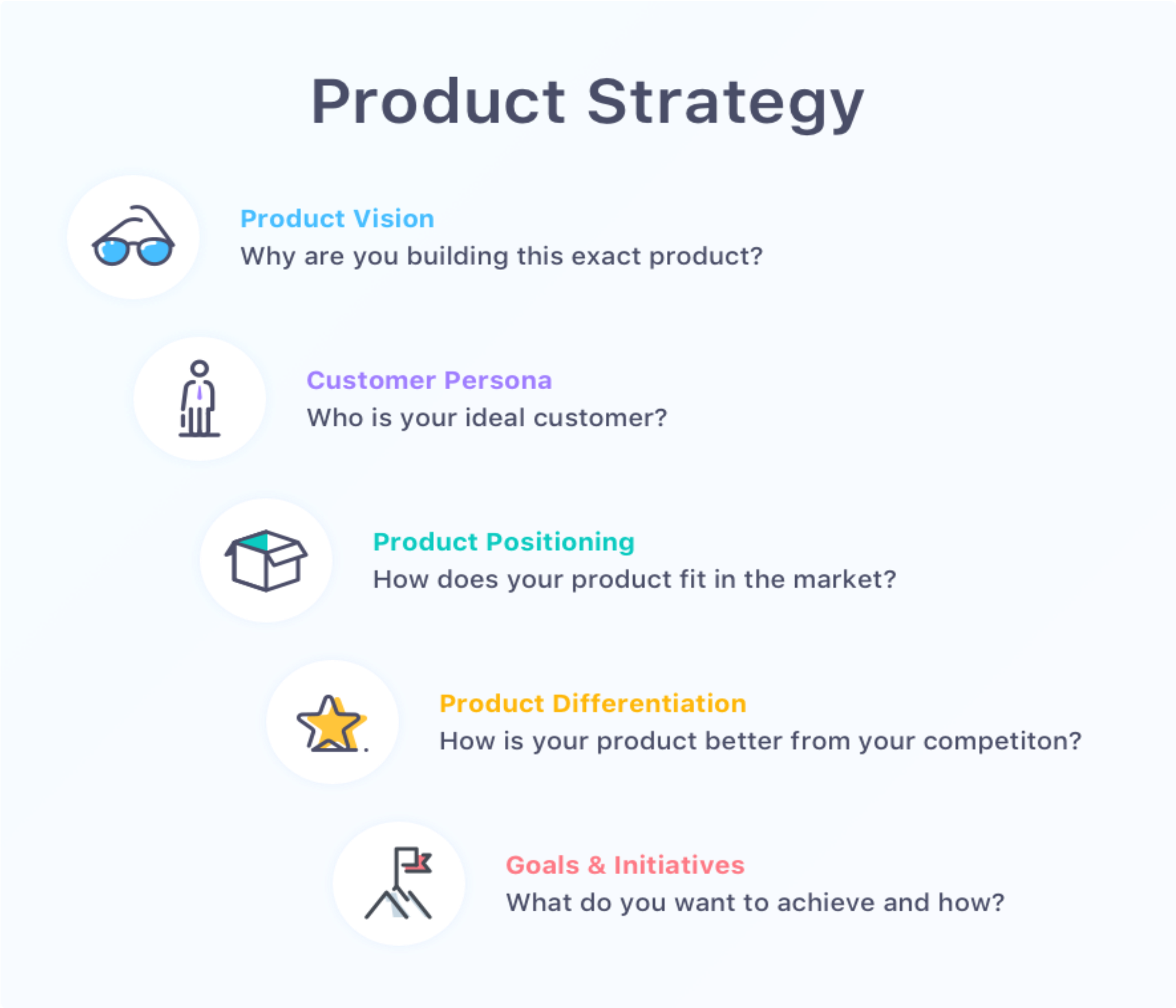
To learn more about the right tools to use, you can read our review of the 20 best product management software for everything from small businesses to enterprises.

Product Strategy

Before you start building a product, you'll need to have a solid plan — or a product strategy.

Product strategy is the foundation of the entire product lifecycle. It should answer 3 main questions:

1. What are you building?
2. Why are you building it?
3. How are you building it?



Aside from being a plan for building the product, product strategy should provide direction to the product manager and the whole team and set out the steps necessary to turn the product into success.

As such, it involves all aspects of product creation:

- Development
- Marketing
- Sales
- Support

A great product strategy should define the following:

Product Vision

Product vision should determine the 'why 'behind your product. Why are you building this exact product and why should people care about it? It should capture the essence of what you want to accomplish with your product, and how it will improve the lives of the people using it.

Target Market/Customer Persona

Next, it's time to answer the question 'who'. Who is going to be using your product? For this, you'll need to determine the target market — the segment of people who will be most likely to use your product, and you'll need to define your customer persona - your ideal customer, together with their goals, challenges, buying motivation, and objectives.

This will be crucial to decide how your product will look, how you will communicate with your audience, where you will reach them, etc.

Product Positioning

Product positioning means defining how your product fits into the marketplace. Rather than changing the product itself, product positioning focuses on the messaging, the way you're going to present your product to the world, and how your audience will perceive it.

However, the most important thing about positioning is to be realistic - positioning is not about how you describe your product, it's ultimately how your users perceive it.

Product Differentiation

Product differentiation should answer the following questions:

How does your product differ from other similar products on the market?

What are its unique values that would motivate your customers to choose your product over another one?

To be able to do proper product differentiation, you'll need to perform a thorough competitive analysis. This way, you can get to know your competition and discover how to outshine them.

Goals and Initiatives

Lastly, product strategy includes product goals and initiatives. The goals should be clearly defined, measurable, and time-bound to help you and your team understand what you want to achieve with the product. We'll talk more about ways to set SMART goals later in the guide.

After setting your goals, it's time to define initiatives, which are high-level efforts necessary to achieve the goals you've set.

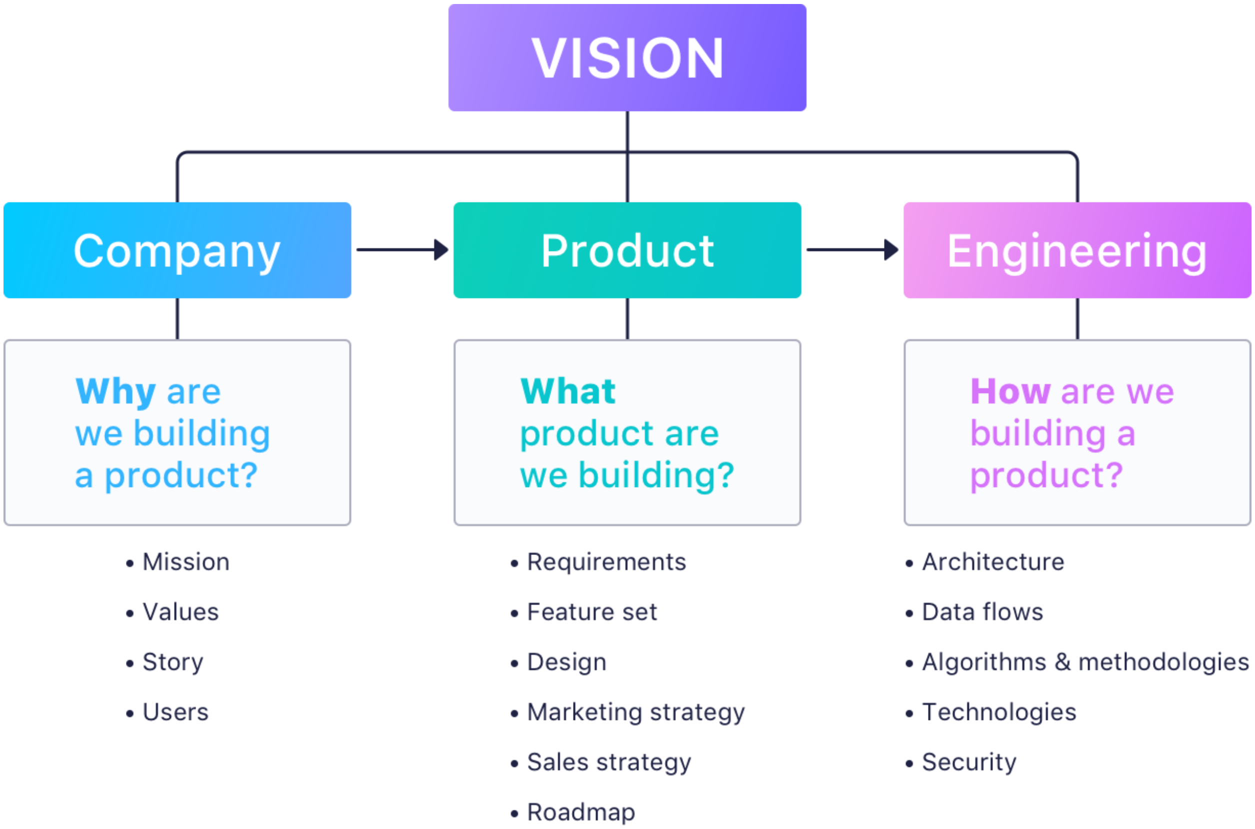
Product strategy will be your guide throughout the whole product creation process and essential for both inbound and outbound product management. That's why strategy is important for the whole team and should be visible to the stakeholders.

In this chapter, we'll define best practices for setting out product strategy and explain how to create a detailed, transparent strategy that will help the whole team know where the product is headed and how you're planning to get there.

How To Define a Product Vision To Guide Your Team

Your product vision should capture the essence of what you want your product to accomplish. In one or two sentences, you should be able to explain where your product is headed and what its ultimate long-term goal is.

In other words, you'll need to determine the "why" behind your product, the reason for its existence on the market. You need to ask yourself "why am I creating this exact product?"



Once you define your product vision, it will be like a compass for your whole team, guiding every aspect of the product creation process.

Creating a Product Vision Statement

When creating a product vision statement, you need to have your end user in mind. So instead of focusing on what the product should accomplish for you and your company, you need to shift focus to the end user.

What do you want your product to achieve for your users? As cheesy as it sounds — how are you planning to make the world a better place with your product?

Having this in mind, the product vision needs to also capture the essence of your audience — their challenges, problems, and goals — and the way your product is ultimately going to make their lives better.

Creating a product vision board will help you arrive at your vision statement.

Image from: *Roman Pichler*

When it comes to the product management process, a product vision is a guiding light that will help you set up your whole product strategy.

The product vision should help you:

- Create a better product roadmap
- Give your team directions along the way
- Align your whole team while working toward the same goal.

Even though all stakeholders should participate in developing the product vision statement, the product manager should have the final say and polish the final version.

Product Vision Examples

Here are some examples of the product vision statements from the world's most successful companies:

Microsoft: *A computer on every desk and in every home.*

Google: *To provide access to the world's information with one click.*

Amazon: *To be Earth's most customer-centric company, where customers can find and discover anything they might want to buy online.*

Samsung: *Inspire the world. Create the future.*

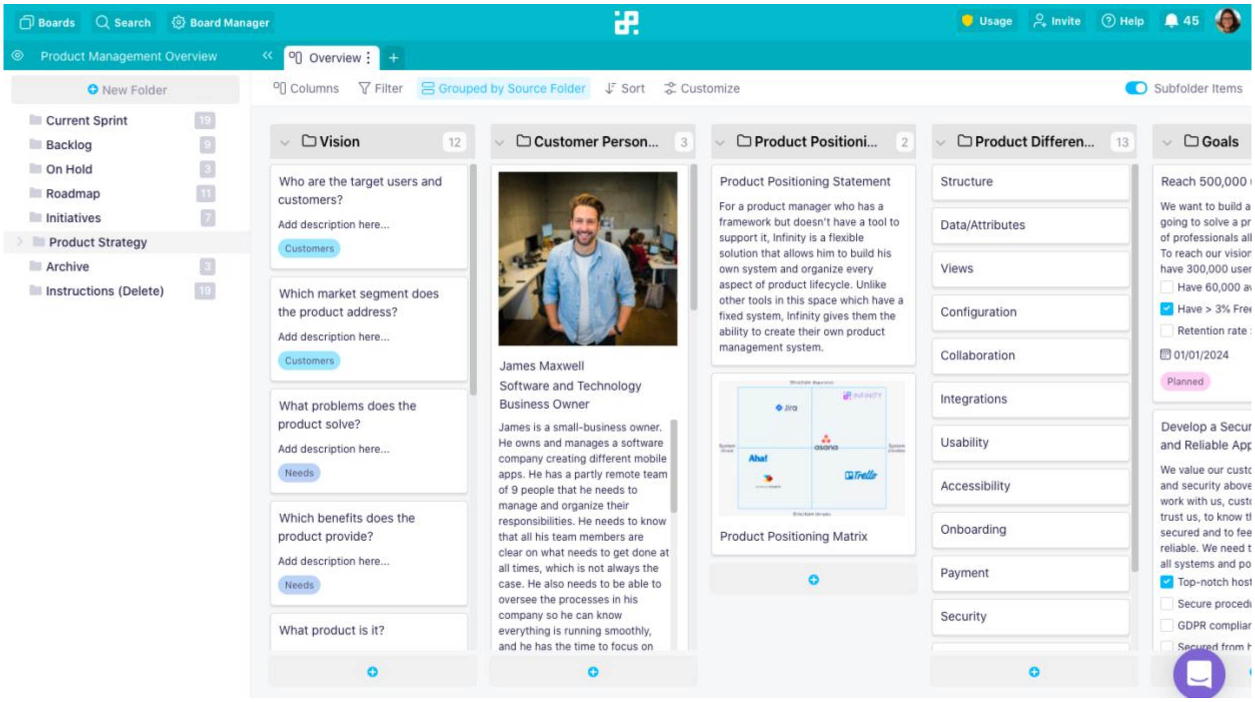
Instagram: *To capture and share the world's moments.*

Infinity: *To help companies realize their vision.*

How To Set Your Product Vision in Infinity

Everyone on your team should live by your vision. That's why it's important to keep it visible for the whole team. Here's how to add the product vision to your Infinity framework:

- **Step 1:** Load the Product Management template into your workspace.
- **Step 2:** Open the Vision subfolder located in the Product Strategy folder.
- **Step 3:** Open every item and briefly answer the question in the Description field.
- **Step 4:** Use the last column to write your vision statement based on previous questions. Use the examples from the Description field as inspiration but then delete them and write your own vision statement.



If you’re not an Infinity user (yet), you can preview the Product Management template here. The template is preloaded with demo data that shows real-life examples of a product vision, sprints, backlogs, and other parts of product management you can use as a checklist or inspiration.

How To Define Your Target Market and Customer Persona

Once you’ve created the product vision, you’ll need to determine who you’re creating this product for.

For this, you’ll have to define your target market and then go a step further to define your customer persona(s). So what is the difference between the two?

Defining Your Target Market

Defining your target market will give you the segment of people you're targeting, according to their age, location, education, industry, interests, gender, and similar demographic information. Of course, you don't have to note down all these details, only those that are relevant to your product.

Although narrowing down your audience may sound counterintuitive at first, it's a crucial step. The fact of the matter is that you can't sell to everyone, and if your marketing scope is too wide, you'll only be wasting your resources.

Marketing to everyone is like shooting darts in the dark — you will probably run out of darts before you even hit the dartboard once.

Keep in mind that the target market and the target audience are two separate things. The target market are people who will be using your product, and the target audience are people you're selling the product to.

Here's an example: you're making software that helps children learn to read. Your target market are children aged 5-8. But, since kids of that age rarely have money (or the desire) to invest in software, your target audience are their parents, grandparents, etc.

So, when making the product, you keep your target market in mind, but when selling the product, you sell it to the target audience. In most cases, these two are the same group of people or they greatly overlap, but sometimes they are completely different.

Creating Your Customer Persona

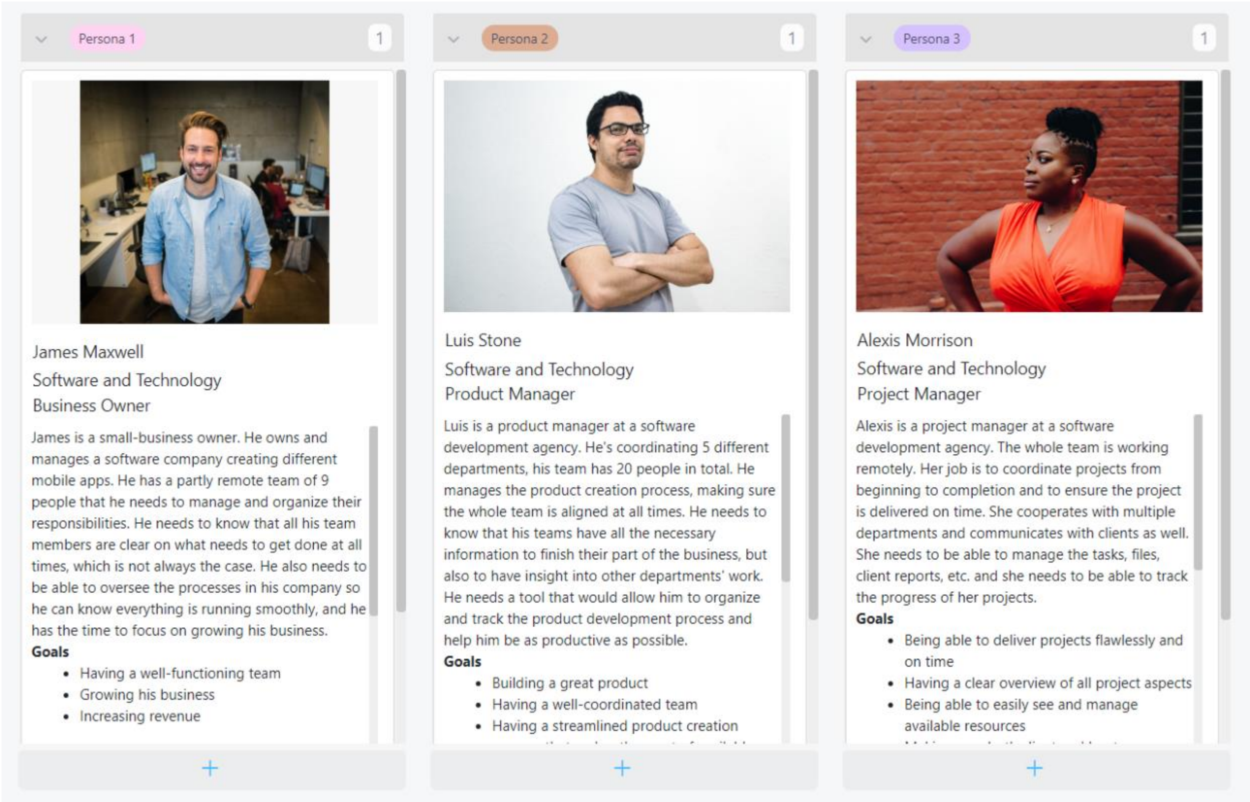
A customer persona (also known as a buyer persona) is the representation of your ideal customer based on market analysis and data collected from existing customers. Aside from demographics, a customer persona should give you information about your ideal customers such as their typical buying behavior, their lifestyle, needs, problems and challenges, goals, and motivations.

Once you [define your customer persona] (or personas), it will help you further develop your strategy when it comes to the product itself but also marketing and sales. You'll be able to know where to find your ideal customers, how to speak their language, create the features they need, deliver the content they're interested in, and even predict their common objections.

How To Create Customer Personas in Infinity

All stakeholders should be able to have a say in approving customer personas you have created, as this step will influence many future decisions. The easiest way to share customer personas with everyone is to create a product management board in Infinity. By using the Columns view, you can create a new column for each persona so that you have an overview of all personas at a glance. As you create a new persona, you can add all relevant information about them along with images that will help you visualize the personas you have created.

Here's an example of Business Owner, Product Manager, and Project Manager personas created in Infinity:



You can easily create your customer persona(s) using the Infinity Product Management template.

- **Step 1:** Open the Customer Personas subfolder located in the Product Strategy folder.
- **Step 2:** Click the item you want to change and a modal will appear.
- **Step 3**: Write a brief description of your persona in the Description field.
- **Step 4:** Add a list of the persona's goals. What does your ideal customer want to accomplish that your product can help them with? When it comes to a B2B company, the ultimate goal will always be to grow their business and increase revenue, but you should also add some goals specific to your product. If you have a B2C business, the situation is a bit different. For example, if your product is a workout app, your persona's goal can be to lose weight or stay fit.
- **Step 5:** Add the persona's challenges. What problems and challenges is your ideal customer facing daily that your product could solve? For Infinity, a typical challenge is "the team needs to use several tools, which causes confusion,

delays, and misunderstanding". Knowing your persona's biggest challenges will help you build the best solution to these exact problems.

- **Step 6:** Add the persona's buying motivation. What motivates this person to buy your specific product? Out of all other similar products on the market, what would be their biggest motivation to buy yours? For example: "they feel limited by the tools they are currently using". Defining buying motivation will help you determine what sets your product apart from others on the market and identify its greatest value.
- **Step 7:** Add the persona's buying concerns. What would be the main objection that could prevent this person from buying your product? Maybe the tool they're currently using is free and yours isn't, or they think that it would take too much effort to switch to your product if they're already using something similar. By defining these objections you'll be able to prepare counterarguments and solutions that would remove the persona's buying concerns.
- **Step 8:** Add products similar to yours that your persona may already be using. This way, you will get a better idea of how your product should outshine and replace them in the eye of your ideal customer.
- **Step 9:** Add the persona's industry to the Industry field.
- **Step 10:** Add their job to the Job field.
- **Step 11:** Remove the current image from the template and add one that represents your customer persona.
- **Step 12:** Repeat the process to add more customer personas.

Once you've defined your customer personas, this will be a strong foundation that will determine all your decisions. But, you should be ready to learn about your audience as you go and even adapt your target market and customer personas if you see the need for it in the future.

Unsure how to start? Preview or download the Product Management template and check out the examples of 3 customer personas we have created along with their goals, challenges, buying motivation, buying concerns, and tools they use. You can use these to build your customer personas off of.

Product Positioning - How Your Product Fits in the Market

The next step in your product strategy is product positioning.

Product positioning means defining where your product fits in the marketplace. So rather than changing the product itself, positioning represents the messaging — how you want your audience to perceive your product.

To be able to position your product, you will need to determine your target market first, which we explained in the previous chapter. Only after you have defined your target market, you'll be able to figure out what kind of message you want to send to them, and the best channels for sending it.

Once you know the group of people you're creating the product for and once you have your customer persona(s), you'll be able to translate their core values and needs into the product benefits that will sound most appealing to them. And you'll be able to create a message that resonates with them.

However, there is one important detail you need to keep in mind. No matter how you position your product, you need to make sure to deliver on the promise. Because at the end of the day, positioning is not what you say about your product, it's how your audience perceives it.

If you have several audience segments, you will also need to adjust your messaging, since different audience segments may see different benefits from your product. Aside from that, you'll need to adjust your messaging depending on the channel you're using. For example, your style will have to be completely different when sending an email, writing a Facebook post, or creating a banner.

Creating Your Product Positioning Statement

Ultimately, your positioning statement should define your target audience, the unique features that set your product apart from the competition, and the benefits that the users will have from it. According to the famous organizational theorist and management consultant, Geoffrey Moore, a product positioning statement formula should look something like this:

For (target customer) who (has a specific problem or a need), our product is a (product category) that (provides this key benefit/solves this problem/fulfills this need). Unlike (primary competitive alternative), our product (provides this unique value).

For Infinity, this statement could translate to:

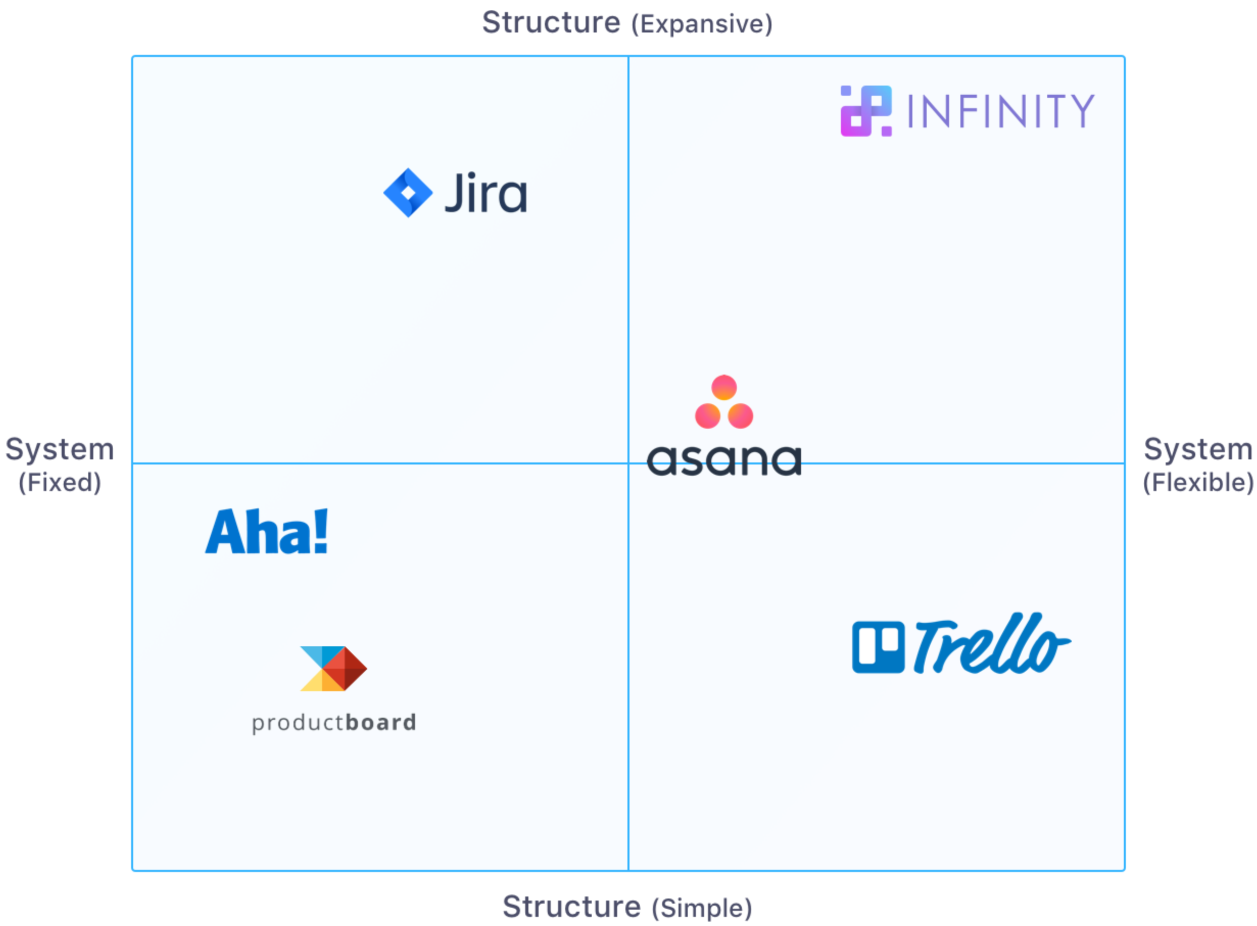
For a product manager who has a framework but doesn't have a tool to support it, Infinity is a flexible solution that allows them to build their own system and organize every aspect of the product lifecycle. Unlike other tools on the market that provide a fixed system, Infinity gives the user the ability to create their own product management system.

Don't forget that product positioning is all about crafting a compelling message that resonates with your target audience. Once you do that, it will serve as the foundation for your product management strategy.

Product Positioning Matrix

To help you visualize your product compared to your competitors, it is a great idea to create a product positioning matrix. By using this method, you will be able to realize which product aspects are the most valuable in your product and how this makes your product stand out from the rest.

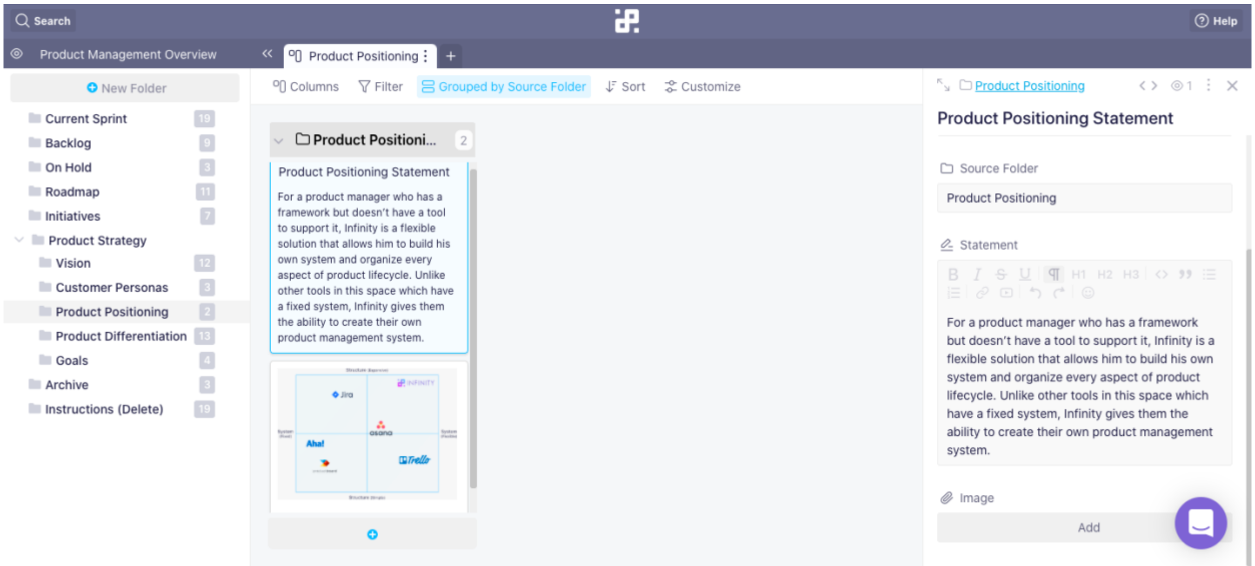
The product positioning matrix should have two axes, both representing an important value in your market. Quality and price are the most common ones, but you can use any other values that are relevant to your product. In the example of Infinity, the product positioning matrix looks like this:



How To Define Product Positioning in Infinity

Just like all other parts of your product strategy, product positioning should also be visible for you and your team at all times. That's why it's important to include it in your product management framework.

If you use the [Product Management template](), it’s pretty simple to add product positioning to your strategy by following the steps below.



Here's how to add your product positioning in Infinity:

- **Step 1:** Open the Product Positioning subfolder located in the Product Strategy folder.
- **Step 2:** Replace the product positioning statement from the first column with your own.
- **Step 3**: Before you create a visual product positioning matrix (like the one we mentioned before), you'll need to define the main categories and main competitors you want to include. So in this step, choose 5-10 main competitors and pick the two axes. In our example, the values are Structure (Expansive - Simple) and System (Flexible - Fixed).
- **Step 4:** Replace the sample product positioning matrix with your own. Click this item and find the Image attribute to replace the sample image with a new one.

Even if you don't use Infinity, you can [preview this template] directly from the browser to get samples of product positioning and the product positioning matrix.

Product Differentiation - What's Your Competitive Edge

Although often defined as a marketing process, product differentiation is much more than that. It is related to every aspect of the product and every part of your team, which is why it belongs right here, in the chapter about product strategy.

Unless you have an incredibly unique idea for a product that nobody has thought of before, chances are you're going to enter a competitive market with lots of similar products already available. Product differentiation should answer the following question — what does your product offer that other similar products on the market don't? What is the unique value of your product that makes it stand out from the competition?

This kind of differentiation can be focused on any aspect of your product. Maybe you're planning to offer a better, more beautiful design. Maybe you're going to develop unique features that your competitors don't have. Or, you're simply planning to offer a lower price and better customer support.

All these aspects are an opportunity for product differentiation, and ultimately product differentiation should motivate the customer to choose your product over another one.

Ideally, product differentiation should explain to your target audience how your product offers everything similar products have and more.

Competitive Analysis

To be able to differentiate your product from the competition, you first need to know who your competitors are and what they have to offer. This is called competitive analysis.

First of all, you'll need to create a list of your ten biggest competitors. After you compile that list, it's time for a thorough analysis. You'll need to define all relevant factors in your niche such as:

- Feature segments
- Design
- Company size
- Prices
- Website traffic
- Number of users
- Customer support
- Other

One of the most important things to analyze when it comes to SaaS products are the feature segments. Feature segments are groups of features that are commonly found in your niche. Defining them will help you create initiatives and build your product roadmap.

To define the feature segments in your niche, you'll need to do the following steps:

1. Find and note down all your major competitors
2. List all the features these tools have
3. Group those features into segments

Setting a Competition Grid in Infinity

Once you have your feature segments and a list of competitors, it's time to create a competition grid where you will visually present your analysis. You can do that by using a table in Infinity.

Here's a product differentiation example from Infinity.

1. We created feature segments such as Structure, Views, Attributes, Customization, Usability, Design, Pricing, etc. Each segment is a separate item.

2. We created a column for each competitor (including Infinity) in the shape of the ‘Rating ’attribute.

3. In each segment, we rated tools on how accomplished they are in this category — one star denoting poor performance and five stars denoting excellent performance.

For example, Infinity gets five stars for ‘Structure ’because of its flexible structure and powerful folders and subfolders, but gets a 3-star rating for ‘Collaboration ’ because it doesn’t have advanced collaboration features like live chat.

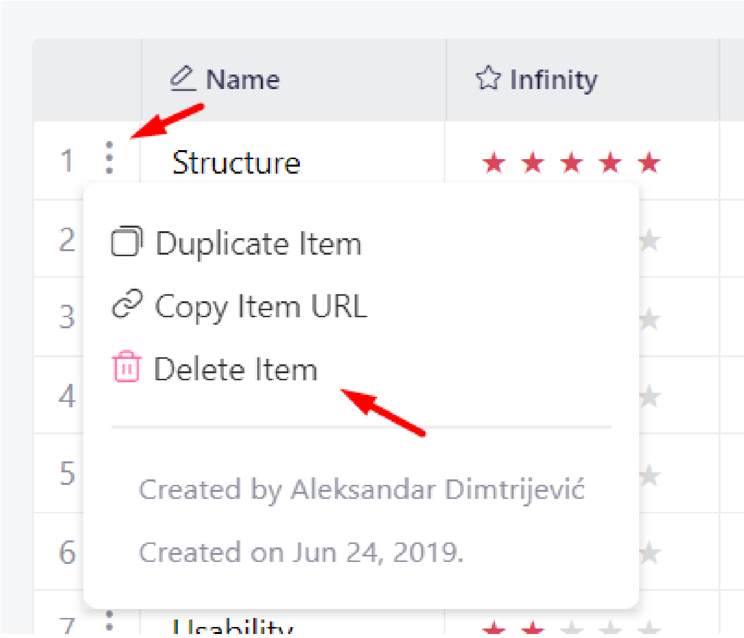
Check out the Infinity competition grid below:

	Name	Infinity	Airtable	Monday	Notion	Trello	Coda	Zenkit	Clickup	Asana
1	Structure	★★★★★	★★★★☆	★★★☆☆	★★★★★	★★☆☆☆	★★★★☆	★★★★☆	★★★☆☆	★★★☆☆
2	Data/Attributes	★★★☆☆	★★★★☆	★★★★★	★★★★☆	★★★☆☆	★★★☆☆	★★☆☆☆	★★★☆☆	★★☆☆☆
3	Views	★★★☆☆	★★★★☆	★★★★★	★★★★☆	★★☆☆☆	★★★★☆	★★★☆☆	★★★☆☆	★★★★☆
4	Configuration	★★★★☆	★★★★★	★★★★☆	★★★★☆	★★☆☆☆	★★★☆☆	★★☆☆☆	★★★☆☆	★★★☆☆
5	Collaboration	★★★☆☆	★★★★☆	★★★★☆	★★★★☆	★★★★☆	★★★★☆	★★★★☆	★★★★☆	★★★★★
6	Integrations	★★☆☆☆	★★★★☆	★★★★☆	★★★☆☆	★★★★★	★★★★☆	★★★★☆	★★★★☆	★★★★★
7	Usability	★★☆☆☆	★★★★☆	★★★★★	★★★★☆	★★★★☆	★★★☆☆	★★★★☆	★★★★★	★★★★☆
8	Accessibility	★★☆☆☆	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★☆
9	Onboarding	★★★★☆	★★★★☆	★★★★★	★★★★★	★★★★★	★★★★☆	★★★★☆	★★★★★	★★★★★
10	Payment	★★★★☆	★★★★★	★★★★☆	★★★★☆	★★★★☆	★★★★☆	★★★★☆	★★★★☆	★★★★☆
11	Security	★★☆☆☆	★★★★★	★★★★★	★★★★★	★★★★★	★★★★☆	★★★★★	★★★★★	★★★★★
12	Automations	★★☆☆☆	★★★★☆	★★★★★	★★★☆☆	★★★★★	★★★★★	★★★☆☆	★★★★☆	★★★☆☆
13	Personalization	★★☆☆☆	★★★★☆	★★★★★	★★★★☆	★★★★★	★★☆☆☆	★★★★★	★★★★★	★★★★☆

To create your own competition grid in Infinity, you can use the Product Management template. Here's how:

- **Step 1:** Open the Product Differentiation subfolder located in the Product Strategy folder.
- **Step 2:** Delete all items in the first column to get a clean table you can fill out with your data. You can do it by clicking the three dots symbol next to the item.

- **Step 3:** Add new items with your feature segments and other differentiation



  factors.
- **Step 4:** Edit the column names. Your tool should be in the first column, followed by your competitors. Just click the name of the column to edit it.
- **Step 5:** Rate your tool against your competitors by filling in the stars in the columns.

Once you set up the competition grid, you will be able to see your competitors 'weak points. This will also help you discover how your product fits into the market and how it can stand out — by its design, features, price, or something else.

By using feature segments, you'll be able to identify your product's potential weak points, which will help you understand how you can improve the product to outperform competition and give your users something unique and valuable.

Preview or download the [Project Management template]() to use the premade competition grid as the basis for your own.

How To Set Smart, Measurable Product Goals

Product goals are the highest-level objectives regarding the product — the big, bold ideas for your product and business in the future. These goals should be the crucial achievements that need to happen to turn your vision into reality.

By always keeping product goals in front of you and your team, you will make it much easier to focus on what needs to be done and when.

Although product goals are abstract, they should derive from KPIs. In other words, they should be measurable and achievable within a certain timeframe.

How To Set SMART Goals

Setting goals might turn out more challenging than you expect. The SMART methodology provides one of the best guidelines for coming up with the right goals and for defining them the right way.

Here's what the acronym SMART stands for:

S = specific, significant, stretching

M = measurable, meaningful, motivational

A = agreed upon, attainable, achievable, acceptable, action-oriented

R = realistic, relevant, reasonable, rewarding, results-oriented

T = time-based, time-bound, timely, tangible, trackable

Aside from creating SMART goals, you'll need to ensure they are aligned with your overall product strategy and business strategy.

Here are a few examples of high-level product goals that will help you drive your product forward:

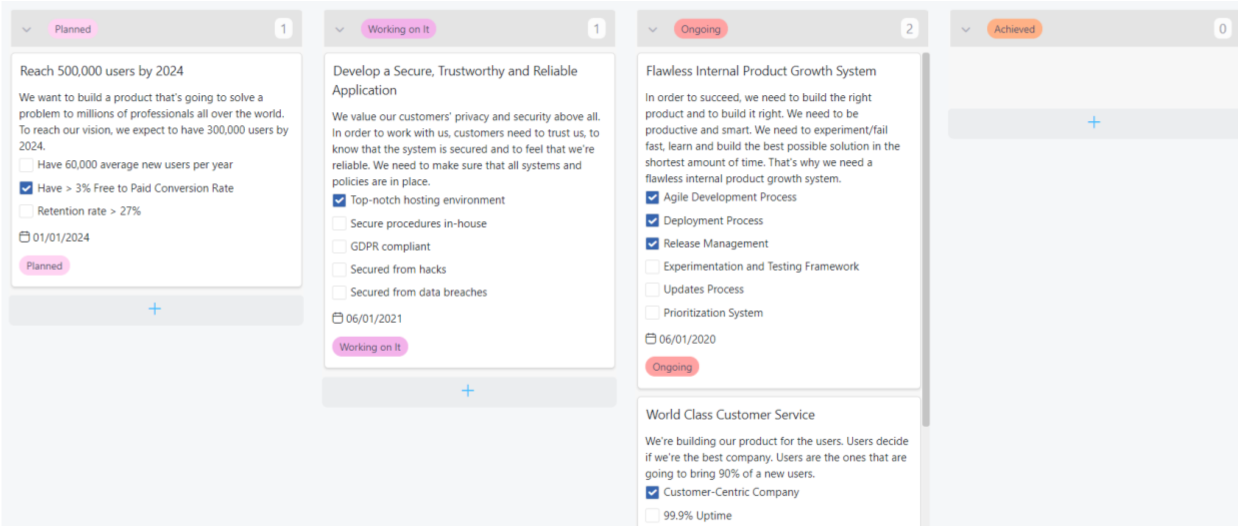
- Become #1 work and data management platform by 2025
- Become a $1 billion company by January 2024
- Develop an exceptionally secure and trustworthy application by 2023
- Reach 1 million users by Q1 2025

Setting Product Goals in Infinity

The goals you set will determine the direction of your product and drive the smaller, short-term goals and actions necessary for the strategy execution. You can set the goals in a separate folder where stakeholders can keep an eye on them, and give editing access only to the product owner and product manager.

Setting product goals using Infinity is pretty easy with the help of our Product Management template. All you need to do is follow these steps:

- **Step 1:** Open the Goals subfolder in the Product Strategy folder.
- **Step 2:** Delete all sample goals, or leave one goal to use as a template and delete everything else.
- **Step 3:** Add a new item by clicking the plus sign below the first column.
- **Step 4**: Write your first goal in the Name section.
- **Step 5:** Add a goal description to the Description field.
- **Step 6:** In Requirements, add a checklist of all requirements that need to be met to achieve this goal.
- **Step 7:** Add an end date to set the timeframe for the goal.
- **Step 8:** Repeat the process for all your goals.
- **Step 9:** As you make progress with your goals, you can move them from one column to another — from Planning to Working on It, to Ongoing, and finally Achieved.



Preview or download the template here to start defining your product goals.

How To Set Actionable Product Initiatives

Once you set your product goals, initiatives will be the actual steps you'll need to take if you want to reach those goals. Even so, product initiatives don't have to be tied to a specific goal as long as they're aligned with your overall product strategy and vision.

The timeframe necessary to complete an initiative can vary from a few months to even a few years. For example, one initiative can be to improve the conversion rate by 3% which can take a few months to accomplish. If your initiative is to reach 100,000 signups, this will take much longer to complete.

The important thing is to set a timeframe and stick to it so you can track your progress, measure the results, and improve your strategy over time.

Here are some examples of product initiatives:

- Get 10,000 new users by November 2024
- Increase free trial engagement by 5%
- Get into the top 10 tools for project management
- Build 3 collaboration features
- Improve onboarding by 50%

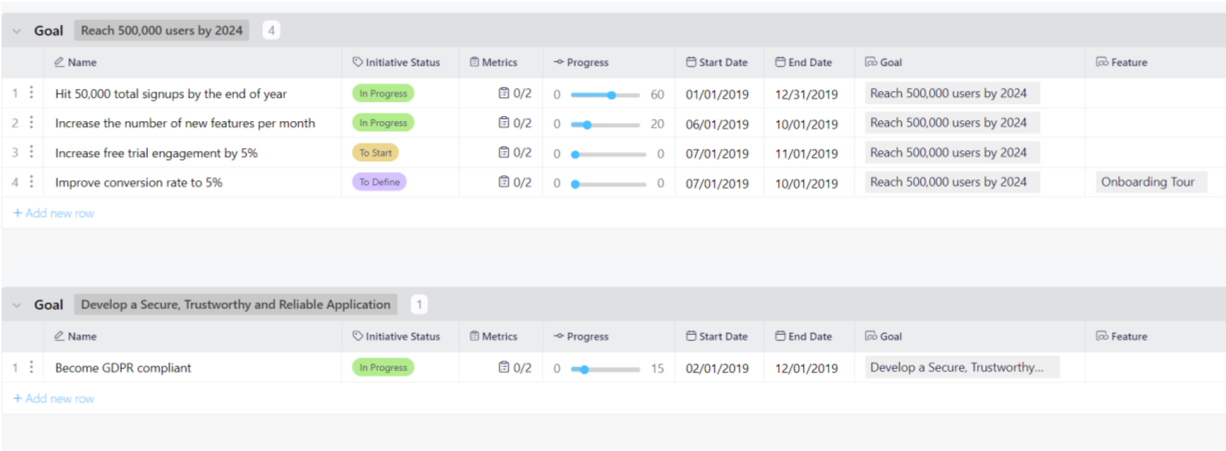
It's easy to see why initiatives are such an important part of your product strategy, but they have more than a single purpose.

Firstly, they will help you figure out what needs to be done inside and outside the product in order to reach the desired goals. Once you lay the initiatives out in the roadmap, you'll be able to share and track them with the team so everyone can be in the loop.

And finally, you'll be able to analyze the effort and impact of your initiatives, so you can tweak your product strategy accordingly and allocate resources in an optimal way.

Setting Initiatives in Infinity

In Infinity, you can set aside a folder for product initiatives. Just like goals, these initiatives shouldn't be too complicated. You should keep all information to a minimum that helps your team understand the initiative, its requirements, and timeframe.



Goal: Reach 500,000 users by 2024 (4)

#	Name	Initiative Status	Metrics	Progress	Start Date	End Date	Goal	Feature
1	Hit 50,000 total signups by the end of year	In Progress	0/2	0 — 60	01/01/2019	12/31/2019	Reach 500,000 users by 2024	
2	Increase the number of new features per month	In Progress	0/2	0 — 20	06/01/2019	10/01/2019	Reach 500,000 users by 2024	
3	Increase free trial engagement by 5%	To Start	0/2	0 — 0	07/01/2019	11/01/2019	Reach 500,000 users by 2024	
4	Improve conversion rate to 5%	To Define	0/2	0 — 0	07/01/2019	10/01/2019	Reach 500,000 users by 2024	Onboarding Tour

+ Add new row

Goal: Develop a Secure, Trustworthy and Reliable Application (1)

#	Name	Initiative Status	Metrics	Progress	Start Date	End Date	Goal	Feature
1	Become GDPR compliant	In Progress	0/2	0 — 15	02/01/2019	12/01/2019	Develop a Secure, Trustworthy...	

+ Add new row

Here's how you can add product initiatives by using the [Product Management template]:

- **Step 1:** Open the Initiatives folder.
- **Step 2:** Delete all sample items in this folder, or keep one and use it as a template.
- **Step 3:** Add a new initiative by clicking *+Add new row below* at the bottom of the table.
- **Step 4**: In the first column, write your first initiative.
- **Step 5:** Add the Initiative Status to the next column. You can see all your options when you click the field.
- **Step 6:** Add relevant metrics. The first metric should be your current value, and the second one should be the target metric.
- **Step 7:** Set the progress bar to show how far along you are with this initiative.
- **Step 8:** In the next two columns, set start and end dates for the initiative.
- **Step 9:** Add a goal to which this initiative is linked.

- **Step 10:** Open the item to add other details such as description, priority, feature reference, etc. You can open an item in the table by clicking the icon on the left.

	Name	Initiative Status
	Implement 3 experiments in Q3	Idea
2	Improve conversion rate to 5%	To Define
3	Increase free trial engagement by 5%	To Start
4	Hit 50,000 total signups by the end of year	In Progress
5	Increase the number of new features per month	In Progress

- **Step 11:** Repeat the process to create more initiatives.

Just a reminder — even if you're not an Infinity user, you can preview this template from your browser and use it as a guideline to setting your initiatives.

Product Roadmap

If the product were a building, the product roadmap would be its blueprint. In other words, you can't even begin to build a successful product without a solid product roadmap.

So, what is a product management roadmap and why is it so important?

A product roadmap is an important document for both your internal teams and external stakeholders. The purpose of a roadmap is to provide several valuable aspects, including:

- Providing the framework for your product development process
- Keeping all stakeholders on the same page (including your team, investors, and even customers)

- Helping to predict how much development power will be necessary to deliver the features you're planning

After defining your product strategy, creating a product roadmap is the next priority. A roadmap is a guiding document that outlines the direction of your product and the plan for executing the strategy. In other words, a product roadmap is a map of features and functionalities that you're planning to add to your product and the general time frame necessary to develop them.

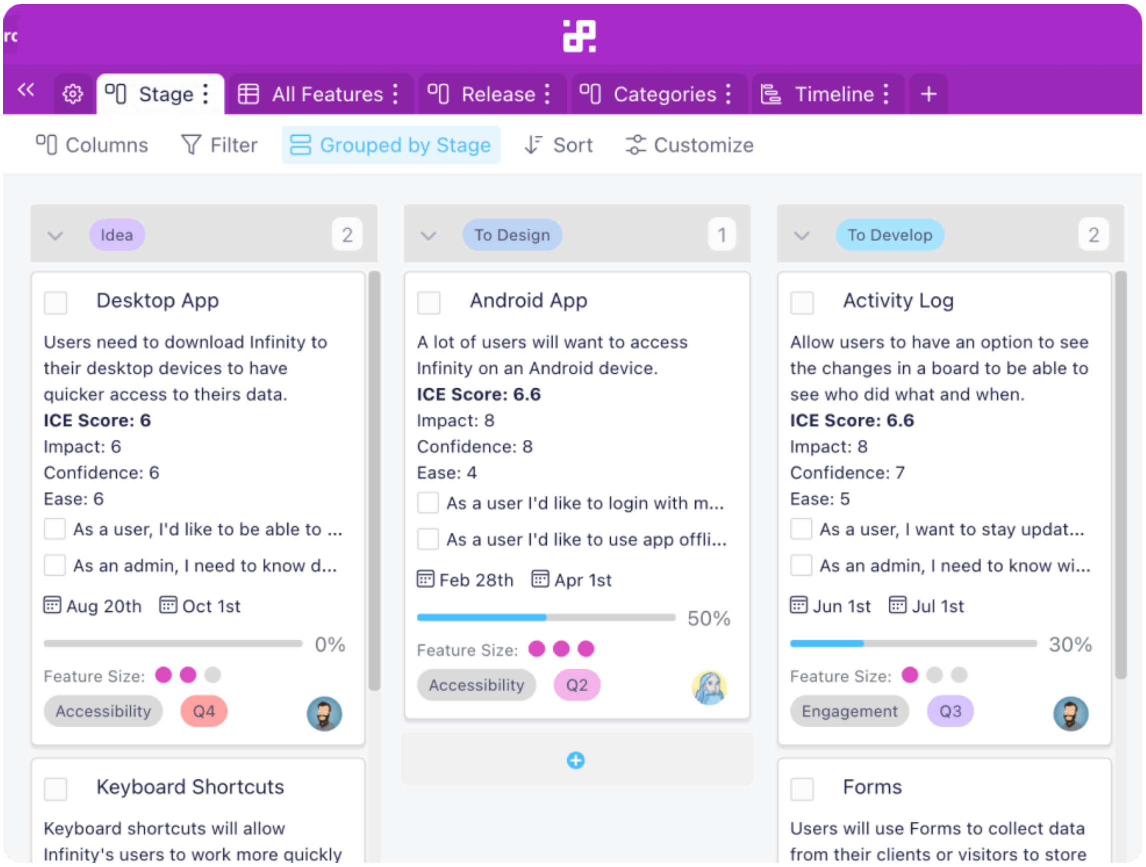
What Is an Agile Product Roadmap?

When it comes to building SaaS products, there are numerous methodologies to choose from. However, one of the most popular methodologies for developing software is Agile. The main idea behind the Agile methodology is focusing the whole development process on satisfying the end user and embracing the changing requirements that are an inevitable part of this process.

This means that when creating a product roadmap, you need to make sure it is completely flexible and regularly updated. The market and your audience will dictate the priorities, and your product management roadmap needs to reflect that.

Setting a Product Roadmap in Infinity

If you're looking to outline your strategy, keep your whole product team in the loop, and ultimately build the best possible product, you can easily do it by using Infinity's Product Roadmap template.



You can download this template to your Infinity workspace to be able to define features and plan releases, prioritize them by importance and effort, track development status and progress, predict how much development power is required to build a feature, and collaborate with your product team to make sure everyone is working on functionalities that have the biggest impact.

To understand the full potential of the Product Roadmap template, you can follow this link to watch a video tutorial:

https://www.youtube.com/watch?v=LQEkO_pMNi0&feature=emb_logo

How To Get Ideas for Features

Once you've set up your product strategy with goals and initiatives, coming up with ideas for your product is not going to be a problem. But you will need to make sure that all the ideas that make the cut and find their way to your backlog are aligned with your product strategy.

For example, if one of your initiatives is to increase conversions by 15%, you need to make sure that your feature ideas are going to contribute toward achieving that goal.

You should also remember to align your feature ideas with the feature segments you've determined in one of the previous steps. For example, you can divide feature ideas into segments like Structure, Views, Usability, Accessibility, Design, etc.

When it comes to getting ideas for features, you can find inspiration in multiple places. It's very important to write ideas down as soon as they are conceived, to make sure you don't forget them. If you're using a product management tool like Infinity, you can add items labeled as Ideas to your product roadmap.

Your Ideas

As the product manager, you will know the product like the back of your hand. This means that you will always know best which features are missing, what needs improvement, or what the users will find the most valuable.

You can come up with ideas in the following ways:

- Analytics will help you see what customers need and which areas of the product need improvement.
- Using the product every day will give you great insight into the problematic areas and bugs as well as potential new features.
- Market research will help you figure out the way market trends are changing and how to improve the product to keep up with those trends.
- Solo brainstorming — dedicate time to think about new ideas and you'll be surprised with the outcome.

Team Ideas

At the beginning of this guide, we mentioned that the product management process requires involvement from the whole team. That's why your whole team should be somewhat involved in the process of creating the product roadmap.

Each part of the team — engineering, marketing, sales, customer success — will have their unique insights about the product because they see it from a different angle.

Developers will know best how each new feature will fit inside the code. Marketing and sales teams can predict what would bring the biggest impact on your bottom line. The customer success team talks to the users every day and knows their problems best.

That's why you should make it possible for your team members to note down their suggestions in the product roadmap. That way, anyone can directly contribute by adding an idea. One of the best ways to get the most out of your team members is to regularly organize brainstorming sessions.

User Ideas

At the end of the day, you're creating the product for the end user. That's why some of your best ideas will come directly from your users.

Make sure to stay in touch with your users/customers through support channels, live demo calls, and community channels (such as a forum or a Facebook group). Your users will be eager to give suggestions, report bugs, and offer plenty of honest feedback that will help you build the product.

A good approach is to directly ask users for their opinions by having polls on what features they want to see next or by providing a form for user suggestions.

Competitors

Picasso once said (and Steve Jobs confirmed): "good artists copy; great artists steal." There's nothing wrong with keeping tabs on your competitors and copying (or stealing) ideas from them.

In fact, that is the only smart thing to do. So make sure to check on your main competitors 'products from time to time, follow their new releases, read their blog, and pick up a few ideas along the way.

Setting Ideas in Infinity

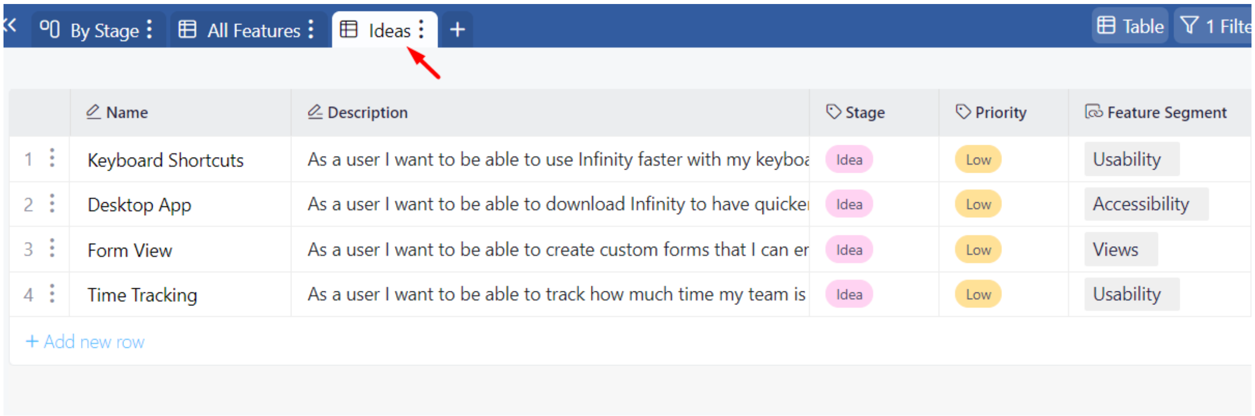
As we already mentioned, it's very useful to include ideas in the product roadmap, but it's also important to keep them separate from the features that are already defined and ready for design and development.

The best way to do this is to create a 'Stage 'label set that will include 'Idea 'as the first label. Grouped by Stage, your product roadmap will then clearly show all your ideas neatly listed in the first column. You'll also be able to create a separate tab and filter out ideas only so you can have them all in one place.

Here's how to add new ideas to your Infinity roadmap:

- **Step 1:** Open the Roadmap folder from the Product Roadmap template.

- **Step 2:** Delete the example Ideas from the first column.
- **Step 3:** Add a new item by clicking the plus sign below the Idea column.
- **Step 4:** In the Name section, write down your feature idea.
- **Step 5:** Add a short description of the idea to the Description field.
- **Step 6:** You can add a Priority label if necessary.
- **Step 7:** You can add a Feature Segment reference if you want. You'll find this field if you scroll down to the bottom of the item.
- **Step 8:** You can leave the rest of the fields empty until you decide whether to implement this idea or not. After you move the idea to the next column, you will fill in the rest of the information.
- **Step 9:** If you want to see only your ideas, click the third tab named Ideas.



To try this out for yourself, preview or download the Product Roadmap template here.

How To Prioritize the Right Features

Once you have your feature ideas, it's time to choose which ones are going to the product roadmap. To be able to do this you will need to prioritize the ideas.

Prioritizing With the ICE Score

When you're developing a product, there are a great number of ways to prioritize features on the roadmap. Whatever method you choose, it's important to cut subjectivity out of the equation.

All the people who contributed with their feature ideas (you, your team, and the users) will feel very strongly about their own ideas. The prioritization process shouldn't be in favor of the loudest or most persuasive person.

The process should be as objective as possible so that you end up prioritizing the features that are the right choice for the product and the majority of users. This way, you can deliver the features that will add the most value first.

As we said, you can try one of the many methods to prioritize the features. When it comes to Infinity and our roadmap, we use the ICE scoring system.

The ICE framework is the feature evaluation method that relies on three factors - impact, confidence, and ease.

- **Impact:** How impactful will this feature be (regarding user experience as well as product goals)?
- **Confidence:** How certain is it that this will prove my hypothesis (based on existing data)?
- **Ease:** How much effort by time is necessary to deliver this feature?

Each of these three criteria should get a 1-10 grade, and the average is considered the ICE score.

For example, if we have a feature called ‘Onboarding Tour ’we can grade it this way:

Impact: 8

Confidence: 6

Ease: 7

ICE Score: (8+6+7)/3=7

It’s important to note that all stakeholders should be taken into account for the scoring process — including all decision-making team members as well as users/customers. Even so, the ICE method is not perfect, as it can result in a lot of biased information.

However, ICE shouldn’t be taken too rigidly. This method is not supposed to be perfect — it’s supposed to help product owners evaluate ideas more easily and make data-driven decisions, instead of getting overwhelmed by everyone’s subjective opinions.

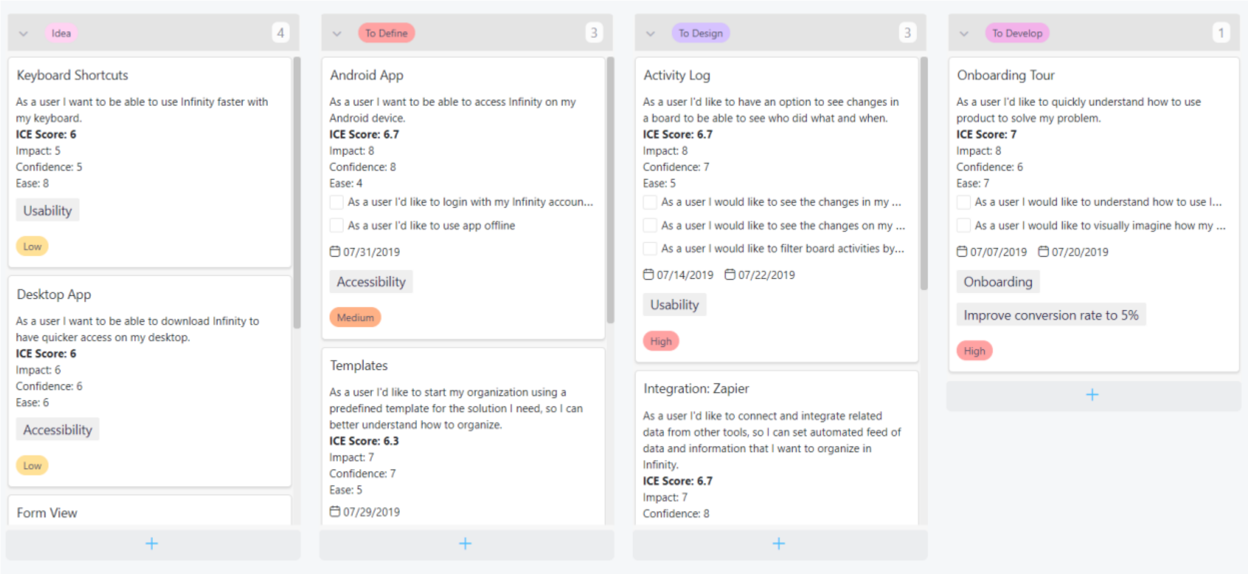
How To Define Features in Infinity

Once you’ve prioritized your ideas, those with the highest scores should be moved to the next column — To Define — where you will add other important details necessary for creating this feature.

So here's how you will turn an idea into a feature:

- **Step 1:** Open the Roadmap folder.
- **Step 2:** Delete the sample items in the roadmap, or leave a few to use as a template.
- **Step 3:** Move the idea to the To Define column by using drag and drop.
- **Step 4:** Click the idea to open it.

- **Step 5:** Provide a short description of the feature in the Description field. You can keep using the one you wrote already. A part of the description should include the ICE score.
- **Step 6:** Add user stories in the form of a checklist. If you're following the Agile methodology, the best way to describe features is through user stories. One product feature can consist of one or several user stories so you can use a checklist to turn user stories into tasks or update the list with new ones.
- **Step 7:** Add an assignee who will be responsible for delivering this feature.
- **Step 8:** Add a priority label - High, Medium, or Low.
- **Step 9:** Add start and end dates to set the feature time frame. Make sure you keep the dates flexible at the roadmap level.
- **Step 10:** Add a Feature Segment reference to link the feature with the segment from the Product Differentiation subfolder.
- **Step 11:** Add an Initiative reference to link the feature to the corresponding initiative(s).
- **Step 12:** Move the feature to the next column. Keep moving the feature to the next column each time it progresses to the next stage.



You can download or preview the Product Roadmap template to learn how to define features based on preloaded examples.

What Are User Stories and How To Write Them

User stories are small units of development that describe a product functionality from the user's perspective. Instead of giving a technical description of a functionality, a user story gives a clear idea of what a user wants to accomplish with it.

A lot of development teams rely on technical descriptions as well, which means you don't have to eliminate them altogether. Still, it's important to keep the focus on user stories and the user's point of view.

Why You Need User Stories

User stories are incredibly useful because they provide a user-centric work framework and allow the engineering team to be as creative as they like, as long as they deliver the end result expected by the user.

Since user stories are supposed to represent the user's point of view, they should be short and simple descriptions written in non-technical language. After reading a story, the team should know what they are building, why they are building it, and what kind of value it will provide to the end user.

How To Write User Stories

The stories are written by the product manager or product owner, but they should be as simple as possible, narrowed down to one or two sentences. If the story is too complicated to write, it might mean that it should be broken down into several smaller user stories.

The details of a user story are added after a discussion with the team. This is where the product manager and the development team come together. At this point, features are broken down into several smaller user stories that can be delivered in a shorter time frame.

This discussion should also provide the conditions of satisfaction — or acceptance criteria — which are a list of conditions that need to be met for the story to be considered complete.

User Story Template

How to write user stories? Typically, a user story template looks like this:

As a *[type of user]*, I want to *[accomplish some goal]* so that *[reason]*.

For example, this is how one user story in your product roadmap could look:

As a user, I want to be able to sort my tasks in a way that makes the most sense to me.

User Story Examples

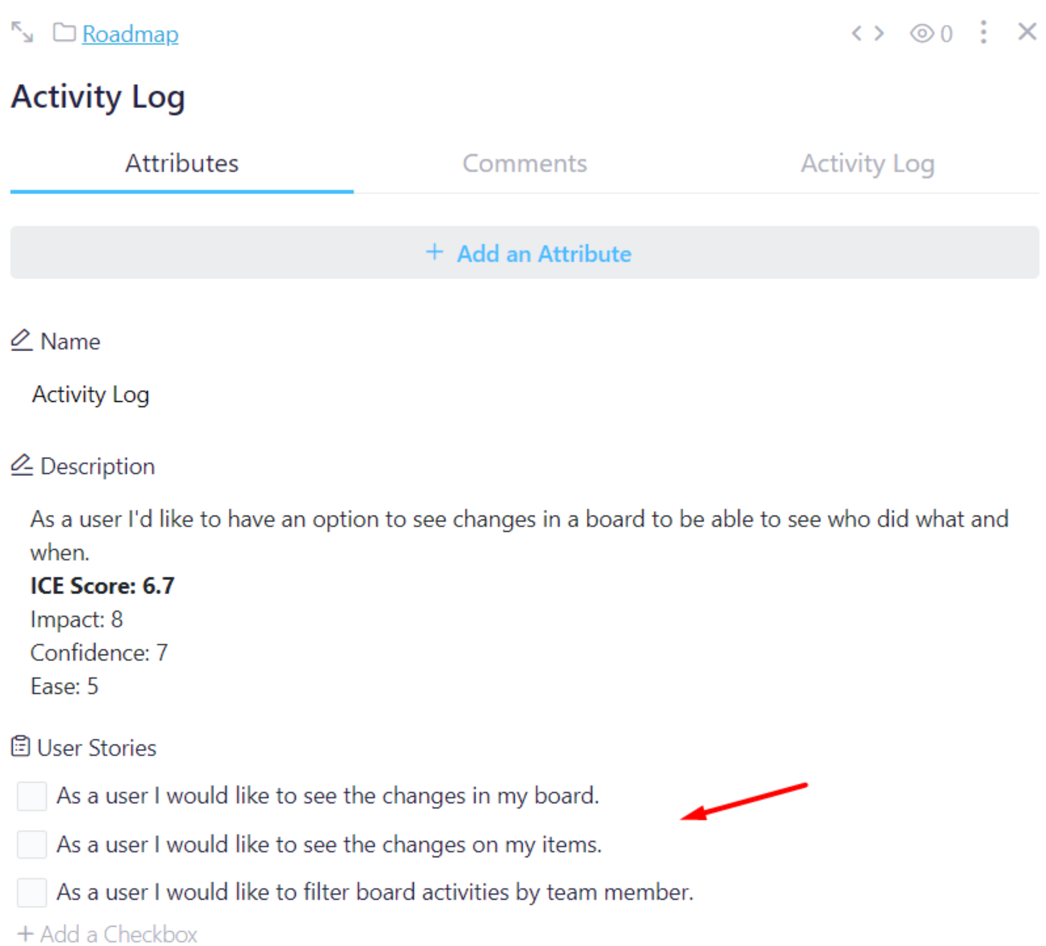
However, this user story can be broken down into multiple smaller stories. So here are a few user stories examples that can come out of it:

- *As a user, I want to be able to sort my tasks by the due date.*
- *As a user, I want to be able to sort my tasks by the assignee.*
- *As a user, I want to be able to sort my tasks by priority.*

Adding User Stories to Your Infinity Roadmap

Once the user stories are defined, they should be available for the whole team to see. That's why it's essential to write your stories down as part of feature descriptions. If you've already built a roadmap in Infinity according to the previous steps we talked about, here's a step-by-step guide to adding user stories to the roadmap.

- **Step 1:** Open the Roadmap folder.
- **Step 2:** Open the item you want to add user stories to by clicking on it.
- **Step 3:** In the User Stories section, add one or more user stories related to this feature.
- **Step 4:** Once a user story is developed, you can check its box in the checklist.
- **Step 5:** Add new stories if they come up.



For a quicker way to set up user stories, there is a [User Stories template]() you can use. This comes in handy for those who are not Infinity users and want to use the template as inspiration, or for Infinity users who want to speed up the whole process.

Product Backlog

A product backlog is a prioritized list of product requirements. Simply put, a product backlog is a list of everything that needs to be done to create the product — features, defect fixes, and other technical work.

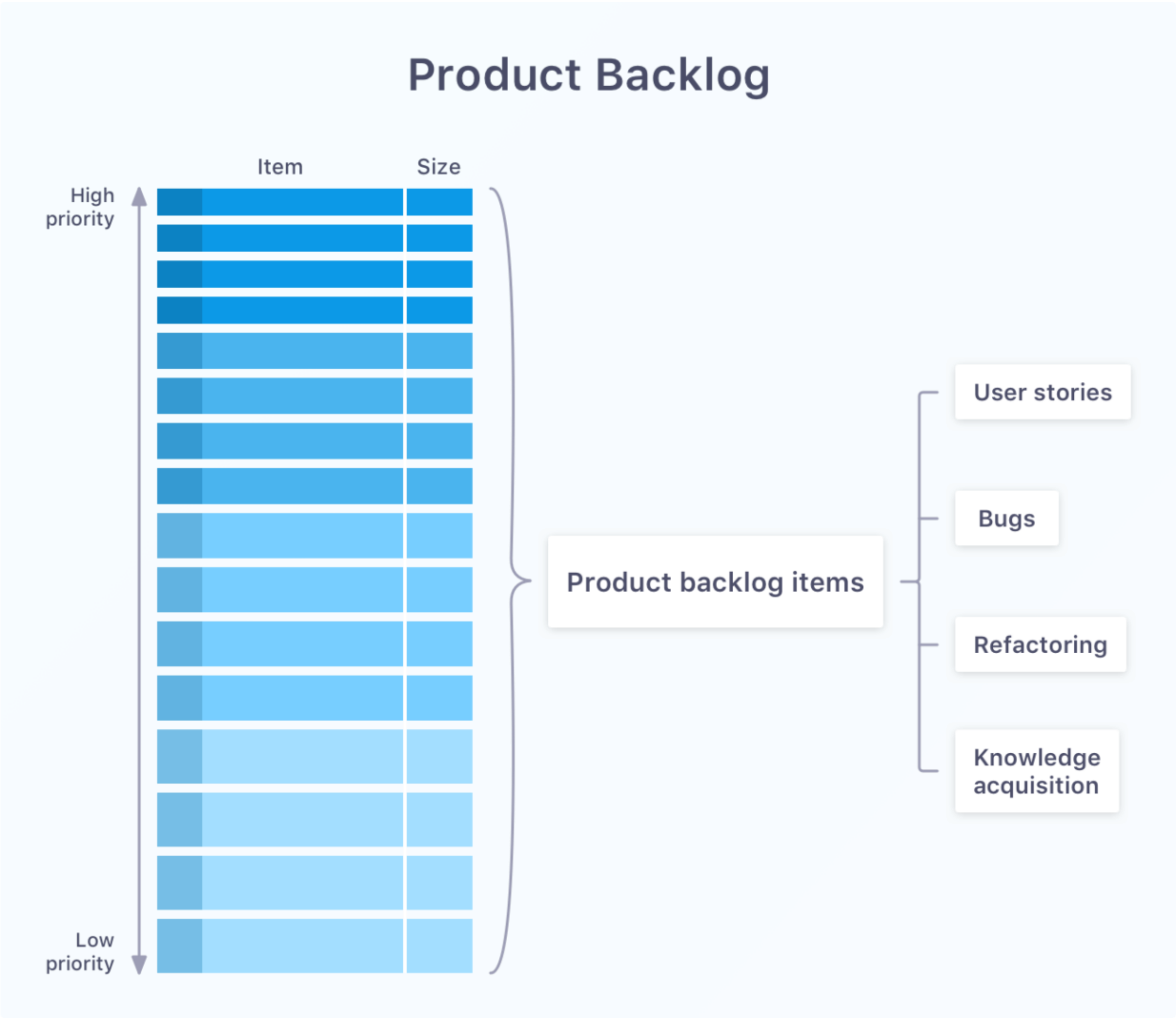
A typical product backlog in Scrum contains four different types of requirements (although you can add more):

1. User stories
2. Bugs
3. Refactoring
4. Knowledge acquisition

When you create the product backlog for the very first time, you'll want to fill it out with the best-known requirements that are aligned with your overall product strategy — your vision, goals, and initiatives.

As your product grows, so should the backlog. One of the basic principles of agile development is continuous work on the product, which is why the product backlog is never complete.

If things go according to plan, your product will evolve and your community will grow, which means that you will receive a lot of suggestions from users and the team in order to make your product bigger and better.



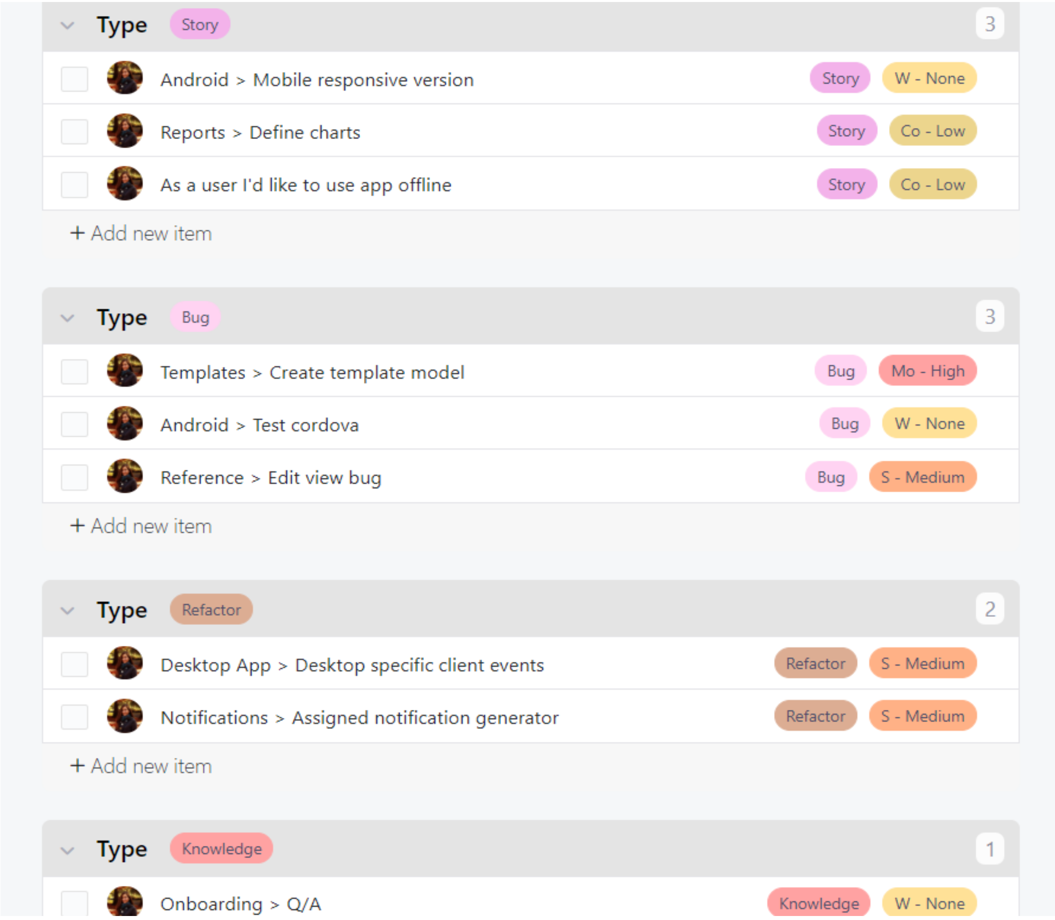
Product Backlog Management

During the sprint planning meeting, you and your team will need to turn the product backlog into the actual to-do list — or the sprint. The product manager and the Scrum master (or the head of development) should come together to figure out which items from the backlog should go into the next sprint. They have to make sure to choose the optimal number of items and the most important items that can be delivered within the coming sprint — which is all part of product backlog management.

A great backlog should state clearly which ideas from your roadmap should be done next and it should ensure that the most impactful features are delivered in each new release.

Your product backlog should also be a reliable source of information for the whole team. Reserve one folder for the product backlog and make sure to keep all relevant information there.

This is how a product backlog looks in Infinity:



You can preview or download the [Product Management template] to access the Product Backlog folder preloaded with sample items.

Types of Product Backlog Tasks

In the previous chapter, we talked about user stories, but there are four main types of items that will be populating your product backlog. So what does a task in the backlog represent?

Backlog tasks are classified into user stories, bugs, refactoring, and knowledge acquisition. Let's dive into each of the four categories and learn how to define and prioritize them.

User Stories

The majority of your backlog tasks will be in the form of user stories, which are the most important items in your backlog. As we already said, user stories are units of development that describe product functionalities from the users 'perspective.

- For example: *As an admin user, I want to be able to control who can delete a task in my boards.*

Aside from this definition, a user story needs to include the acceptance criteria, which represents the conditions that need to be met for the story to be considered complete.

Bugs

Bugs are errors in the code discovered during peer review or testing. A bug will end up in your backlog most likely after it gets reported by a user or noticed by someone on your team.

Bugs will usually be high-priority items in your product backlog. However, they should be discussed just like other backlog items during the backlog refinement and weekly Scrum meetings.

- Example: *New item on the task list appears in the middle of the list.*

Refactoring

Refactoring is the process of restructuring existing code without changing the external behavior of the software. This results in better code readability and lower complexity, which makes the code much easier to work with and build upon.

In other words, refactoring is essential for creating a good basis for improving the tool and adding more value in the future.

Knowledge Acquisition

As their name suggests, knowledge acquisition tasks are tasks focusing on gathering new information and knowledge to accomplish some future task.

Let’s imagine that there is a user story that your development team doesn’t know how to tackle or that requires some prior learning. A knowledge acquisition task will be assigned to a team member to give them the knowledge necessary to eventually develop that user story and all similar stories in the future.

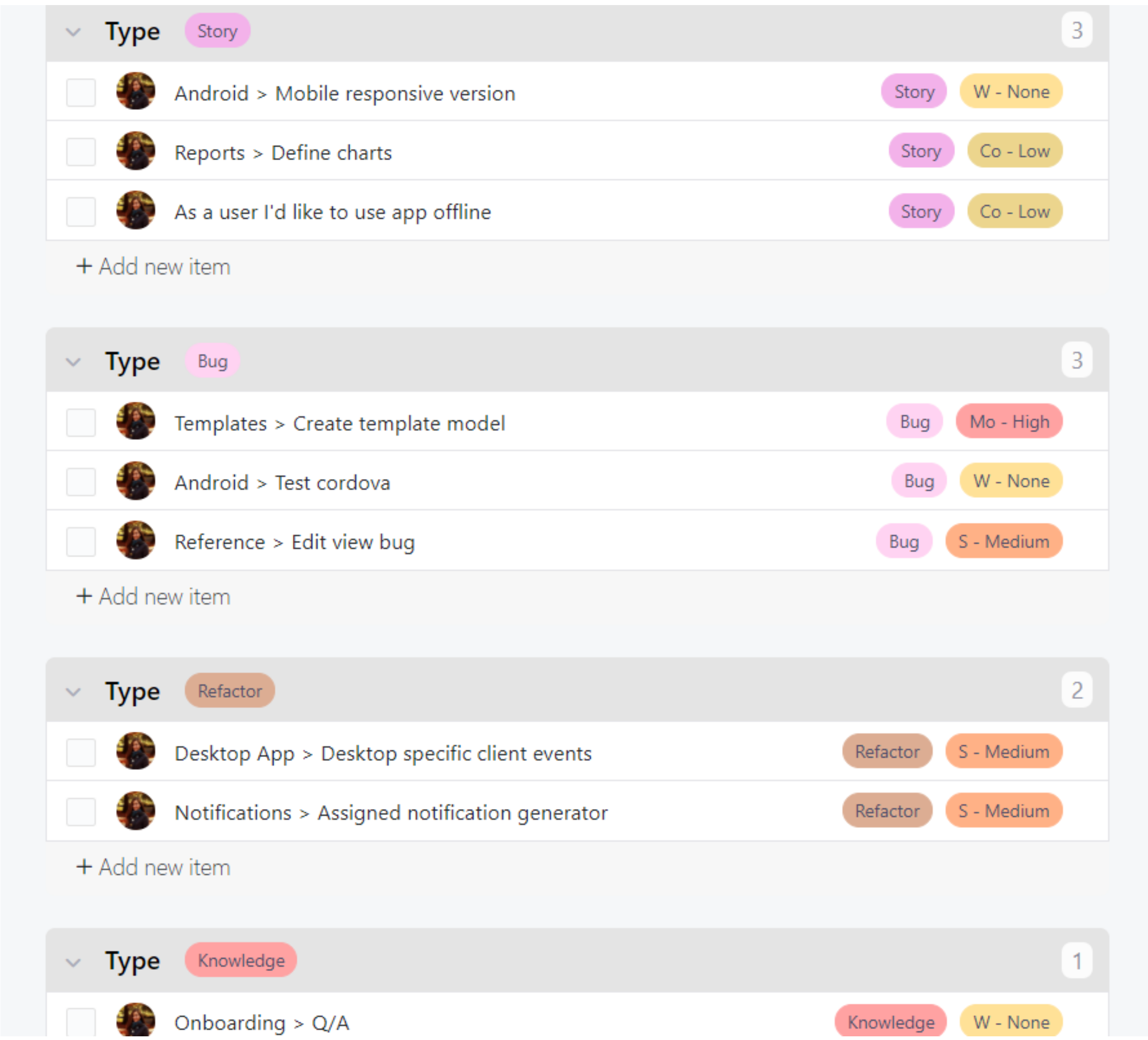
- Example: *Research WordPress plugin libraries and select which one to implement.*

How To Manage a Product Backlog in Infinity

Adding new tasks to the product backlog is simple when you have the Product Management template to help you out. Here's what you need to do:

- **Step 1:** Open the Backlog folder in the Product Management template.
- **Step 2:** Delete all sample tasks or keep a few to serve as a template.
- **Step 3:** Create a new task by clicking +Add new item below each group. Make sure you add the task to the correct group depending on its type — Story, Bug, Refactor, or Knowledge.
- **Step 4**: Write the task in the Name field.
- **Step 5:** In the Description field, you can briefly explain the task or add the user story related to it.

- **Step 6:** Assign a team member who will be responsible for this task.
- **Step 7:** Add a priority level — make sure to read the next chapter where we'll explain backlog prioritization.
- **Step 8:** Add 'To Do' Status to high-priority tasks you're planning to work on in the next sprint.
- **Step 9:** After prioritization and backlog grooming, you will move high-priority tasks directly to the sprint by using Exdrag and drop.



You can explore a real-life example of a product backlog by loading a preview of our Product Management template or by downloading it to your Infinity workspace.

Task Prioritization With the MoSCoW Method

During the product development process, you will have ideas, suggestions, and bugs coming left, right, and center. That's why you'll need to prioritize tasks in your backlog and make sure that the most impactful ideas are developed first.

By performing task prioritization, you will be able to divide all tasks into three groups:

- Tasks that will go into the next sprint
- Tasks that will be developed later
- Tasks you won't be working on at all

So, how do you prioritize the backlog?

The MoSCoW Method

There are several backlog prioritization methods that can help you manage your backlog, and you can choose whichever works best for you. In this guide, we will cover one of the most popular methods, called the MoSCoW method.

The MoSCoW method is a prioritization technique that allows you to reach common ground with all stakeholders and make sure to deliver the most important requirements first. The system differentiates between these four levels of priority:

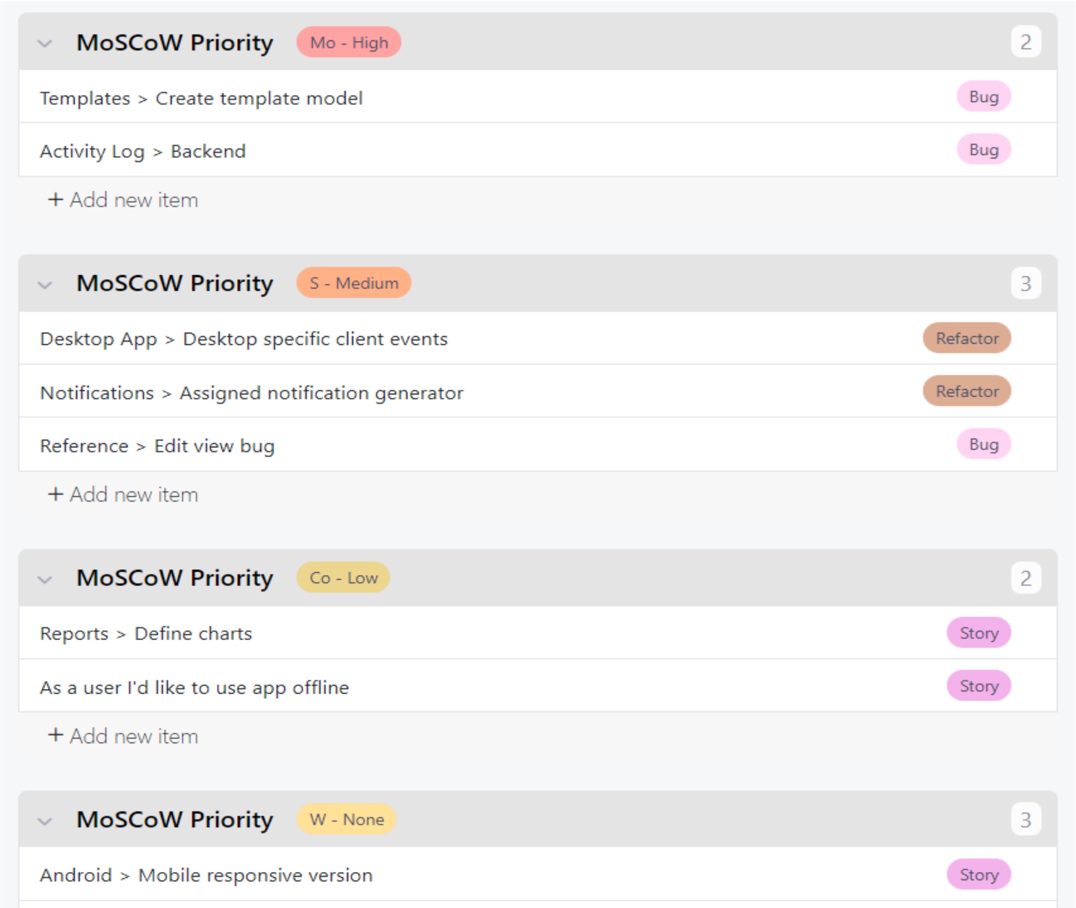
Mo (Must Have): The most vital product requirements that you (or your users) can't live without.

S (Should Have): These requirements are important but not essential for your next release.

Co (Could Have): These requirements are nice to have, but not as important as Should Have items.

W (Won't Have): User stories that provide little or no value so you can leave them for later.

Once you start prioritizing tasks in your backlog in such a way, it will become much clearer for you and the stakeholders what should be worked on in the next sprint. To make this prioritization more visual, you can create separate labels for these four priority levels.



To make your product backlog even cleaner, you can create a separate folder for your W (Won't Have) items. You can name the folder Long Term, Future Tasks, etc. In Infinity's Product Development board, we call this folder On Hold and we keep all lower priority tasks there.

You should revisit this folder from time to time and check if some of these items have deserved their spot in the backlog or if they should be completely scratched off the list.

You don't have to follow the MoSCoW method to a tee. To make things simpler, you can create a label set in your Backlog folder called Priority and give it values Mo - High, S - Medium, Co - Low, and W - None. In this case, the items with no priority will go to the 'On Hold 'folder, while the rest will become contenders for the sprint.

How To Use MoSCoW Method in Infinity

Here's how you can prioritize your backlog in Infinity's Product Management template:

- **Step 1:** Open the Backlog folder.
- **Step 2:** Open an item.
- **Step 3:** Assign a MoSCoW label.
- **Step 4:** Repeat for each item that lands in your backlog.

To make sure you're objectively prioritizing tasks, you'll need to take into consideration a few other factors such as:

- High value to the user
- High benefit to the business
- Ease of implementation
- Time to implement
- High/low risk
- Cost
- Dependencies between items

All of these factors will be crucial to help you decide which backlog items will go into the next sprint. Here's why this is important — sometimes you will have a medium or low priority task that is low-risk, low-cost, and super-easy to implement. In this case, you might consider adding this item to the sprint since it's going to be an easy but nice-to-have addition to your next release.

The best way to adopt the MoSCoW method is through practice, which is why we added task examples to the Product Management template. You can preview or download the template and observe tasks in the Current Sprint, Backlog, and On Hold folders to get an idea of how to prioritize your tasks.

Backlog Refinement, aka Backlog Grooming

Backlog refinement, also known as backlog grooming, is the process of keeping the backlog clean and orderly and adding the necessary details and estimates to the product backlog items. Product refinement is the result of the product refinement meeting held between the product owner/manager, Scrum Master, or CTO and the development team.

During the product backlog refinement meeting, top items from the backlog are discussed, reviewed, and revised. You should hold this meeting once per sprint and it should happen near the end of the sprint to ensure that the backlog is ready for the next sprint.

Why You Need To Have a Well-Groomed Backlog

Backlog refinement can have multiple important benefits. Refinement reduces confusion and uncertainty and prepares the team to be much more efficient in the following sprint. If done right, this meeting also helps reduce the time necessary for the sprint planning meeting.

Plus, refined backlog items are much easier to estimate and implement.

In order to reach these benefits, it’s crucial to include the whole development team in the meeting (or at least as many team members as possible).

The discussion needs to be focused on gaining more insight into each backlog item and helping the responsible team member understand what needs to be done. You should document all decisions for future reference.

For a successful product backlog grooming meeting, each team member needs to know their responsibilities.

- The product owner or manager is supposed to lead the meeting and make sure all decisions are in line with the overall product strategy.
- Scrum Master needs to facilitate communication between the development team and the product owner.
- Developers need to find and document creative solutions for backlog items, give time estimations, break up backlog items into smaller tasks if necessary, and collaborate with other team members on finding unified solutions.

If the whole Scrum team is involved in the process of product backlog grooming, it becomes much easier to plan and execute a successful and fruitful sprint.

Scrum Sprint

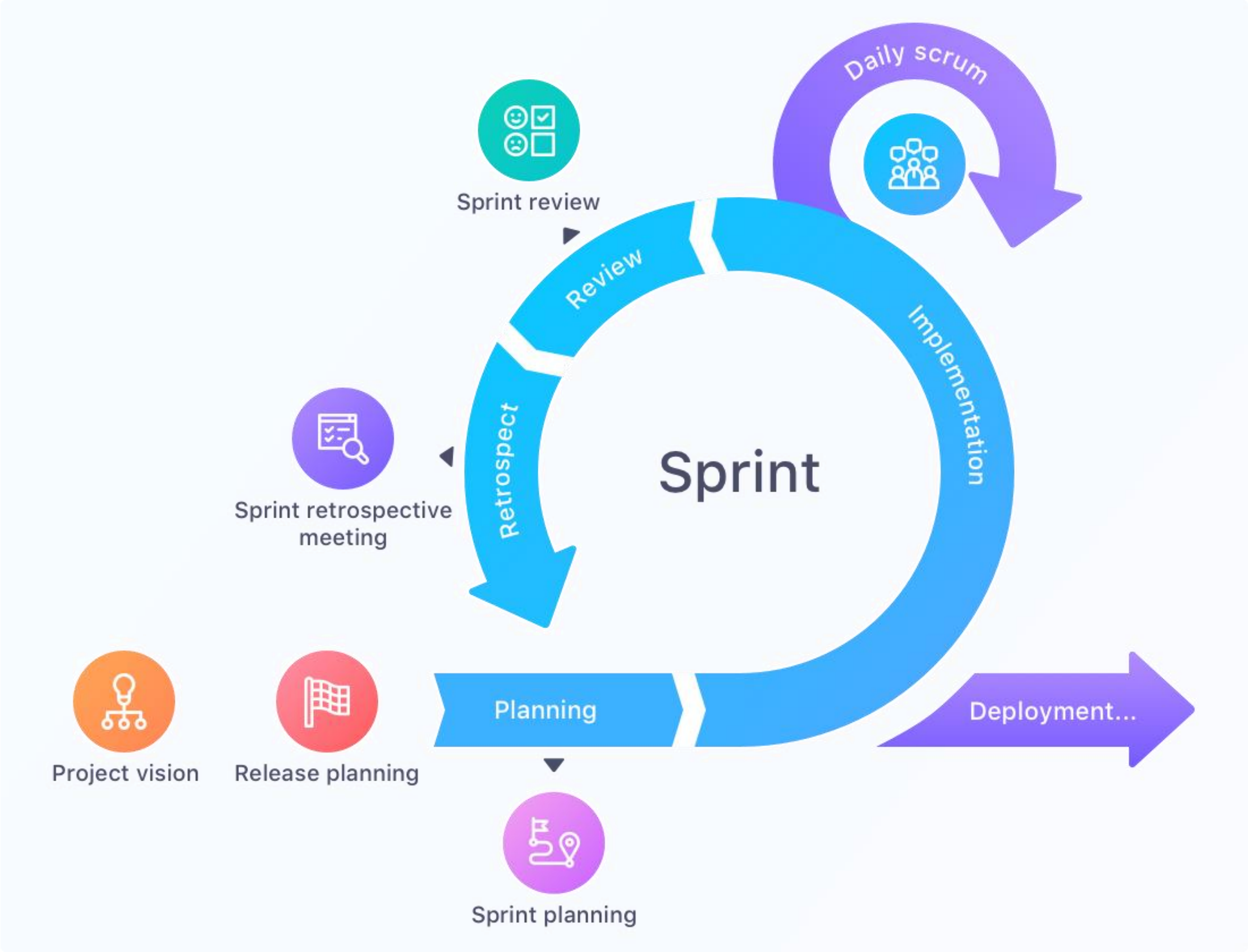
A Scrum sprint is an iteration of development work that is accomplished in a fixed timeframe. A sprint usually lasts between one and four weeks, but it shouldn’t be longer than a month. The length of a sprint is determined at the beginning of the agile project and it should be followed throughout the project.

During a sprint, the Scrum team builds a set of features and functionalities predefined in the sprint goal. At the end of each sprint, a potential new release of the software is completed.

Each agile sprint starts with a sprint planning meeting where the product owner (or manager), Scrum Master, and development team come together to choose which backlog features will be completed in the following sprint.

While the product manager decides on the sprint goal and the criteria that need to be met to achieve the goal, the development team decides how much work can realistically be done during the sprint.

Once the Scrum sprint begins, the product owner needs to leave the Scrum team to work independently until the end of the sprint and should only provide feedback and answer questions if needed.



The sprint ends when the time allocated for the sprint ends, regardless of whether all tasks have been completed. After that, a sprint review meeting takes place where the product owner determines whether the sprint goal has been achieved.

The following agile sprint starts as soon as the previous sprint ends, allowing the development process to work like a well-oiled machine.

What Happens During Sprint Planning?

Sprint planning happens during the sprint planning meeting held by the whole Scrum team - the product owner, Scrum Master, and the development team.

As its name suggests, sprint planning is the process of planning the following sprint. The meeting shouldn't take more than eight hours for a month-long sprint, but ideally, it should take an hour per each week of the sprint.

The plan should be the result of a collaborative discussion of the entire Scrum team and it should identify the backlog items that will be delivered in the upcoming sprint and determine how this work will be done.

Sprint planning needs to happen right before the sprint but after the sprint review and retrospective.

Each successful sprint needs to have a sprint goal, which is the main priority at the beginning of every sprint planning meeting. The sprint goal is the objective of the sprint that should guide the development team while building the next product increment. All tasks for the following sprint should be aligned with the sprint goal.

Who Makes the Decisions?

As we already said, the whole Scrum team should be involved in sprint planning, and everyone has a specific role:

- The Product owner should propose the sprint goal and the backlog items to work on in the upcoming sprint.
- Developers should give estimates on how many tasks they can handle in the upcoming sprint and discuss how they're planning to deliver these tasks and ultimately achieve the sprint goal.

- The Scrum Master facilitates communication between team members and ensures that the discussion is effective. They need to make sure everyone is on the same page regarding the goal and the backlog items that will be handled in the sprint.

Together, they should decide which items from the backlog will be completed in the sprint, as well as define their requirements, potential problems, and the factors that will determine when a task has been done.

How To Plan a Scrum Sprint in Infinity

The best way to plan the sprint in Infinity is during the sprint planning meeting. As the team discusses the tasks that will be done in the next sprint, the product owner should move tasks from the Backlog to the Sprint folder using drag and drop and hitting the Move button.

Once a task is moved to the Sprint, the product owner needs to add all necessary details to define the task. This includes the team member responsible for this task, estimated time to finish the task, flexible due date, priority, etc. You can use the Product Management template to plan your sprint, and here's how:

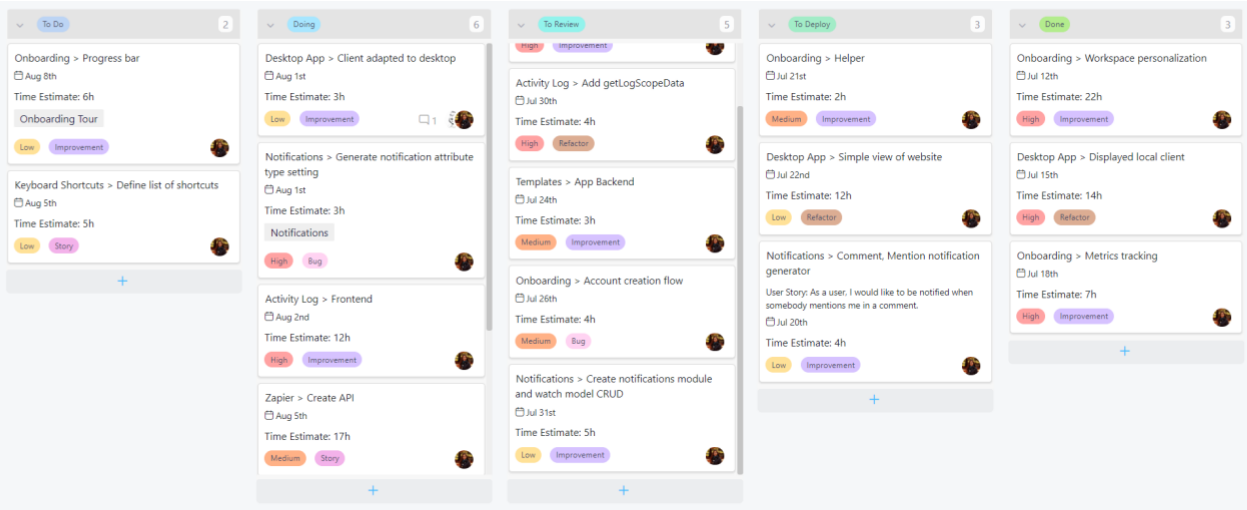
- **Step 1:** Move the task from the Backlog to the Current Sprint folder.
- **Step 2:** A task that was in the Backlog will already have some information filled out — name, description, assignee, and type. You can update these if necessary.
- **Step 3:** Add a time estimate that you will get from the developer responsible for the task.
- **Step 4:** Add the To Do status which will move the task to the first column.
- **Step 5:** Add a priority level - High, Medium, or Low.
- **Step 6:** Add the due date.
- **Step 7:** Link the task to the corresponding feature in the roadmap by adding the feature reference.
- **Step 8:** Add any relevant links if necessary.

After you finish sprint planning, it's time for the sprint. How do you manage a sprint in Infinity?

One of the most convenient ways to manage sprints is to keep them in separate folders. After each sprint planning meeting, you can easily move the backlog items you and the team agree on to the Sprint folder.

Once you have a dedicated Sprint folder, you can recycle it and reuse it throughout the project. You can simply add new tasks from the backlog after each sprint planning meeting, and move completed tasks to the Archive folder at the end of the sprint.

In our [Product Management template](), you'll notice that the sprint is organized in columns determining the stages of the task development process. A classic Kanban approach works well here because it gives the whole Scrum team a clear overview of the sprint's progress.



As a task progresses through the sprint, you should also move it along the Kanban board. Each task will start in the To Do column and end up in the Done column once (and if) the task is completed. People responsible for tasks should move the tasks they're working on between columns so that the Scrum Master and the rest of the team always know how the sprint is going.

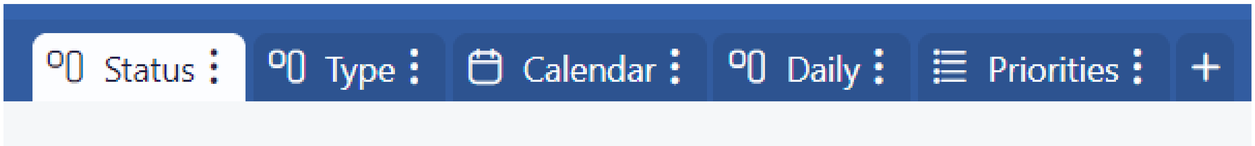
Once a task is completed, it should be moved from the Done column to the Archive folder.

How to Use Tabs to Organize a Sprint in Infinity

The first and most important tab for the whole Scrum team should be the columns grouped by status so that everyone on the team can easily track sprint progress.

This way, you'll be able to streamline the sprint process and always the status of each task and the amount of work left before the end of the sprint. You can easily add additional tasks if any unexpected work comes up.

The second tab in our template is another Kanban board where tasks are grouped by type. The third tab is reserved for a calendar, which is going to come in handy when keeping track of the deadlines. The fourth tab is reserved for daily tasks, while the fifth one shows the tasks organized by priority.



Of course, you can always rearrange your tabs, delete those you don't need, and add new ones simply by clicking the + button at the end of the tabs bar.

Our Product Management template is available for preview or download, so you don't have to organize a sprint from scratch.

Why You Need Daily Scrum Meetings

Daily standups, also known as Daily Scrum, are quick daily Scrum meetings that the Scrum team has every day of the sprint. These meetings should be time-boxed to 15 minutes to keep the discussion quick but effective.To eliminate confusion and keep things as productive as possible, daily Scrum meetings should be held at the same time and same place every day. It's best to have them in the morning before the Scrum team starts their work.

The whole team should attend daily standups — the Scrum Master, product owner/manager, and developers. Other team members can attend and listen but they shouldn't actively participate in the discussion.

If other people are present at the daily standup, the Scrum Master should ensure they don't disrupt the meeting.

During the meeting, the Scrum team should go over the Scrum meeting agenda. This includes synchronizing activities and planning the work for the following 24 hours. Each team member should state:

- What they did the previous day
- What they're planning to do that day
- Whether there are any obstacles in their way

The Scrum Master needs to make sure to remove those obstacles or find someone on the team who can do it.

By sharing this information, the whole team knows what has been done and what still needs to be worked on. It's wrong to consider daily standups as feedback sessions where developers report to the Scrum Master and product owner. Instead, these meetings should help the whole team gain more knowledge of their progress and focus on the goal ahead.

Having daily Scrum meetings increases the chances that the development team will meet the sprint goal.

Sprint Review vs. Sprint Retrospective

Although sprint review and sprint retrospective can be mistaken for the same thing, these two Scrum events are completely different. Here's a bit more about each of the two types of meeting and the things that set them apart.

Sprint Review

In each sprint, the Scrum team should produce a potentially shippable product increment. The sprint review is a meeting at the end of the sprint where the Scrum team and all stakeholders get together and discuss what has been accomplished during the sprint and whether the sprint goal has been met.

The people attending the sprint review should include the product owner and product manager, Scrum Master, the development team, management, and anyone else involved in the product creation process.

This is usually an informal type of meeting where the Scrum team presents the product increment, while the stakeholders provide feedback. A sprint review shouldn't last more than four hours per month-long sprint (up to one hour per each week of the sprint). The Scrum Master needs to ensure the meeting doesn't run longer than that.

Aside from presenting the work done during the sprint, sprint review meetings should have a few other things on the agenda:

- The product owner needs to inform the team about the tasks that have been completed and those that are not yet done.
- The developers need to discuss problems they encountered during the sprint and how they were solved.
- The Scrum team answers sprint-related questions from the rest of the team.
- The team should discuss which tasks come next, which provides a great basis for the next sprint planning meeting.

Sprint Retrospective

The sprint retrospective meeting takes place immediately after the sprint review. While the sprint review is a discussion about what the team is building, the sprint retrospective is focused on how they're building it.

This meeting is usually slightly shorter than the sprint review and shouldn't last more than three hours per month-long sprint. To get the most out of a sprint retrospective meeting, you should ensure that the whole Scrum team, including the product owner, attends and participates.

The goal of a sprint retrospective is to improve the development process. The Scrum team reflects on the previous sprint and discusses what's working well, what could be improved, and how they could improve overall productivity.

Although these improvements may be implemented during the sprint, the sprint retrospective gives the Scrum team a formal opportunity to discuss the process and motivates each team member to voice their opinion and ideas.

For a successful sprint retrospective meeting, each team member should try to answer the following sprint retrospective questions:

1. What went well during the sprint?
2. Is there anything that can be improved?
3. How can we make those improvements?

Instead of using the sprint retrospective as an opportunity for complaints, this meeting should be constructive with everyone on the team making an effort to improve the process and create an enjoyable work experience for the whole team.

When organizing sprint review and sprint retrospective meetings, it helps to have a dedicated task management tool. Infinity offers the Agile Development template you can customize not only to plan sprints but also to keep and organize sprint review and sprint retrospective notes, stakeholder feedback, suggestions on how to boost productivity, and much more.

You can preview this template in your browser to get inspiration on how to further improve your agile development processes.