

# UNLEASH YOUR LEADER WITHIN

Comes after [Product Vision Brief](#) and [Quarterly/Annual Planning Brief](#)

## {Product Initiative Name}

Summary	{2 sentence elevator pitch about the initiative}
Goals	<ul style="list-style-type: none"> <li>• {Goal 1}</li> <li>• {Goal 2} (optional)</li> <li>• {Goal 3} (optional)</li> </ul> e.g. “Improve retention for midmarket customers”; “Acquire new logos in strategic segments” ; “Decrease time/cost to implement new customers”
Customer/User Group Impacted	{Name of group of customers/users} {Quantified # of customers/users and the revenue they represent}
Current Issue / Situation	{3-4 sentences describing what experience the customers/users are having currently and why it is problematic. Potentially discuss the Job to be done by your initiative for the customers/users}
Proposed Solution	<ul style="list-style-type: none"> <li>• {Feature Name 1}: {1 sentence overview of feature}</li> <li>• {Feature Name 2}: (optional, same format as above)</li> <li>• {Feature Name 3}: (optional, same format as above)</li> <li>• {Feature Name 4}: (optional, same format as above)</li> </ul>
Prioritization Reasoning	{2-3 sentences about why this is important NOW to the business and why this is being chosen to be worked on to get more buy in from team}
KPIs impacted / Success Metrics for the initiative	<ul style="list-style-type: none"> <li>• {KPI for Goal 1}</li> <li>• {KPI for Goal 2} (optional)</li> <li>• {KPI for Goal 3} (optional)</li> </ul> e.g. “Improve retention for midmarket customers 10%”; “Acquire 15 new logos in strategic segments”; “Decrease time/cost to implement new customers by 2 weeks” each of these should have a goal time frame listed.

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Milestones / Roll out plan	<ol style="list-style-type: none"><li>1. {Milestone Goal Date 1} – {Target customer to be served by that time and/or increased feature functionality available}</li><li>2. {Milestone Goal Date 2} – {Target customer to be served by that time and/or increased feature functionality available}</li><li>3. {Milestone Goal Date 3} – {Target customer to be served by that time and/or increased feature functionality available}</li><li>4. ....</li></ol> <p>* Each milestone helps create the definition of “DONE” for that stage. Later milestones may mention things like Alpha or Beta release, and the final milestone should be full roll out with full functionality. This document should be revisited at the end of each milestone to adjust later milestones accordingly based on what was accomplished and learned during the previous time period.</p>
Screenshots / Mockups	{Anything currently available... pictures are worth 1000 words}