# Product management template

**User guide**

IBM Rational Focal Point Version 6.5

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# Introduction

## The product management template

The IBM® Rational® Focal Point product management template contains a pre-defined configuration setup that you can use as a product management solution. The template provides a library of tools that are based on best practices and frameworks for product management.

With the template, product managers can capture business needs, do win/loss analyses, and build product road maps to focus on delivering customer value from the time an idea is captured until the product is delivered.

The product management template is suitable for projects related to consumer electronics, independent software vendors (ISVs), web developers, medical devices, and pharmaceuticals.

By using the template, you can accomplish these objectives:

- Capture ideas from internal stakeholders, customers, win/loss or competitive analyses, and other resources by routing their emails to Rational Focal Point and using web-based capture and analysis tools. By using these tools, you can ease the demands for reporting and decision-making.

- Understand customer value when you make decisions about product features and direction to ensure that your products are successful.

- Leverage best practices for product management activities, and configure the activities to support your own processes.

## Getting started

Before you use the product management template, you must create your own workspace based on the template. Instructions are in the IBM Rational Focal Point Information Center.

The examples and screen captures in this user guide are based on Gizmo Inc., a fictional mobile device manufacturer. All demo data that is used to illustrate product management is fictional.

Each user has a specific role in the product management template. When users log in, they see their home pages, which include information that is

specific to their roles. The role-specific home pages ensure that each user sees the information that they need to do their work. For example, *stakeholders* see a list of the *business needs* that they have raised. A *product manager* sees the status of each release, and *developers* see the business needs that they are assigned to. Users can personalize their home pages.

# The product management process

Product management is not an exact science. It includes a number of disciplines, such as product development and marketing. You can follow the process in the product management template to develop products in an organized way. The following image shows the overall product management process that is applied in the template.
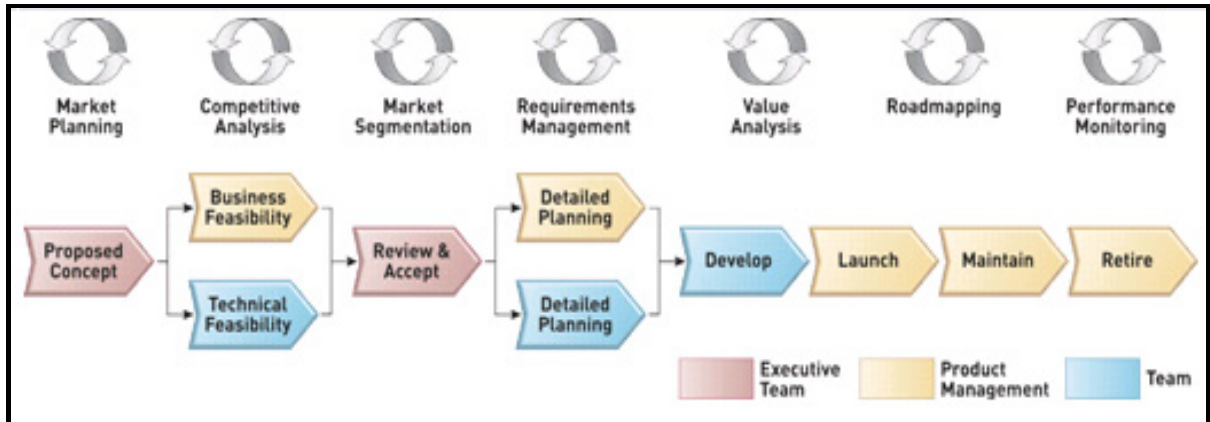


*Figure 1. The product management process*

Within the template, there are three different life cycles; one for products, releases, and business needs, respectively. The life cycle for each of these elements is driven by the overall product management process. In other words, the overall product management process is carried out through the life cycles of products, releases and business needs. However, the overall product management process image also includes various other activities that are carried out separately from the overall process. These activities include, for example, competitive analysis, value analysis, road mapping and market planning, as indicated by the circular arrows in Figure 2.

## Life cycles

The life cycles are implemented based on the following attributes:

- For Products, the life cycle is specified in the Lifecycle Phase attribute.
- For Releases, the life cycle is specified in the Status attribute.
- For Business Needs, the life cycle is specified in the Status attribute

|  | Lifecycle Phase in the Products module | Status in the Releases module | Status in the Business Needs module |
|---|---|---|---|
| **Proposed Concept** | Concept | In Planning | New<br><br>Accepted |
| **Business Feasibility** | Concept | In Planning | Accepted |
| **Technical Feasibility** | Concept | In Planning | Accepted |
| **Review and Accept** | Concept | In Planning | Accepted<br><br>Planned |
| **Detailed planning (PM)** | Under Development | In Planning<br><br>Planned | Planned |
| **Detailed planning (Tech)** | Under Development | In Planning<br><br>Planned | Planned |
| **Develop** | Under Development | Started<br><br>Completed | Started<br><br>To be tested<br><br>Completed |
| **Launch** | Introduced | Approved | Completed |
| **Maintain** | Growth<br><br>Maturity<br><br>Decline | Approved | Completed |
| **Retire** | Terminate | Approved | Completed |
| **Additional states** |  | Postponed | To Be Clarified |
|  |  |  | Duplicate |
|  |  |  | Rejected |
|  |  |  | Postponed |
|  |  |  | Delete |

Each status value has an icon. Wherever an attribute is shown, its status icon is displayed. The following image shows the possible values for the status attribute of a business need.
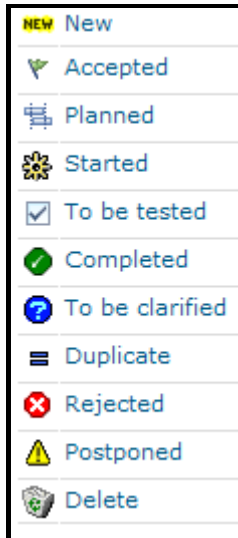
*Figure 2. Icons for business need statuses*

In the template, the Delete status is used for a soft delete. Use the Delete status to indicate to the workspace administrator which elements can be deleted. Until an element is physically deleted, it is marked to be deleted and is not visible in most views.

A product can have the following life cycle phases:



*Figure 3. Product life cycle phases*
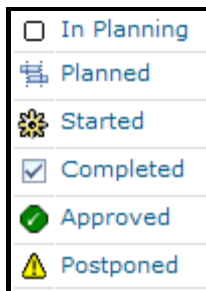
A release can have these states:



*Figure 4. States of releases*

## History

All attributes that have the **logged changes** icon have an automated history.



*Figure 5. Logged changes icon.*

To see the change history for an element, click the **logged changes** icon of an attribute. You can revert to a previous version by clicking the rollback icon.



*Figure 6. Rollback icon*

The Version attribute is automatically increased based on changes in the attributes.

## The process for business needs

The process from creating a business need to implementing it in a release is shown in the following table and image.

| Step | Definition | Description | Output state |
|------|-----------|-------------|--------------|
| ER | Elicit request | Gather the business needs | New |
| AR | Analyze request | Identify and review new business needs to ensure their quality and to remove any duplicates | To be clarified, Accepted, Rejected, or Duplicate |
| PR | Plan business needs for a release | Decide which accepted business needs are added to a future release | Planned |

| DTW | Do the work | When a release starts, the developers implement the business needs. | Started or Postponed |
|-----|-------------|------------------------------------------------------------------------|----------------------|
| VR  | Verify (Test the business need) | After work is complete and all business needs are implemented and tested, perform user acceptance tests. | To Be Tested or Completed |

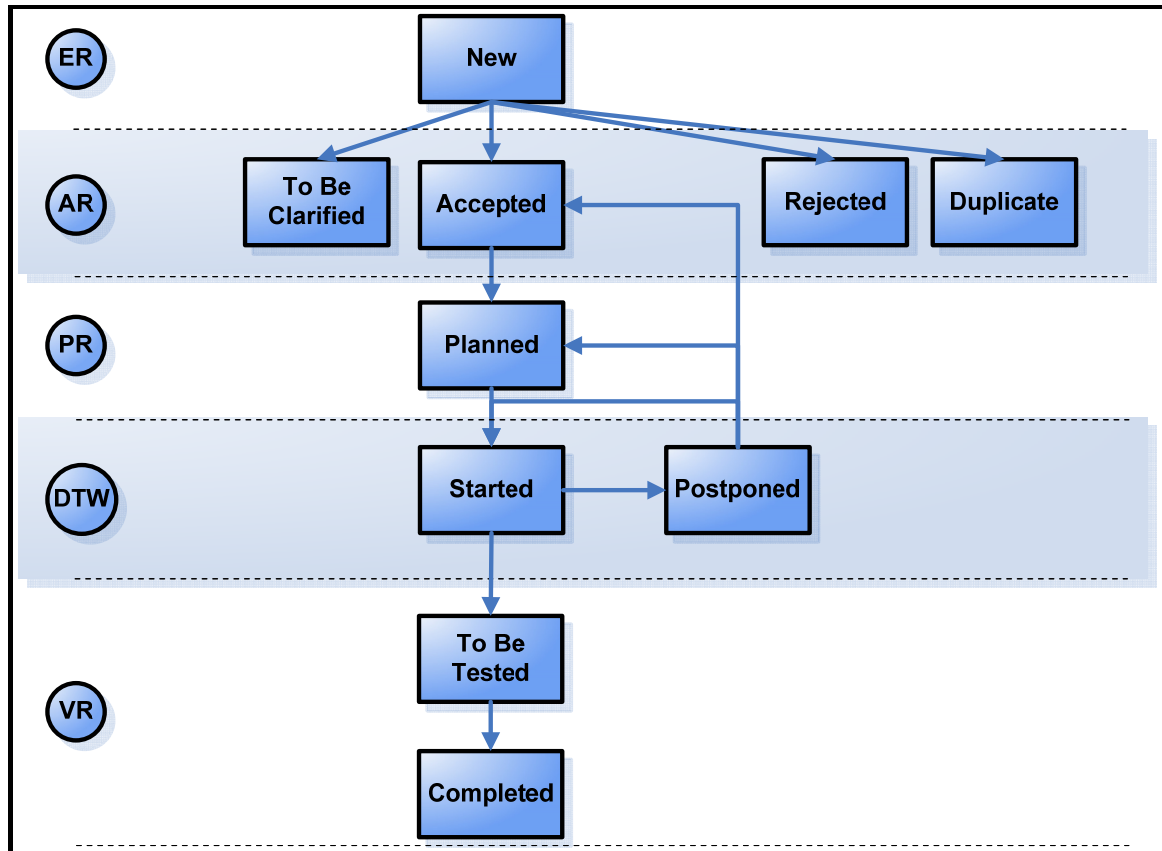This business needs process is specified in the Status attribute:



*Figure 7. The process to implement a business need in a release*

The process for business needs are supported by a workflow engine. The workflow transition area is available only in the display views of some business needs and only for some users, such as the product manager. When the user clicks a transition for a business need, the business need is transferred to that state.
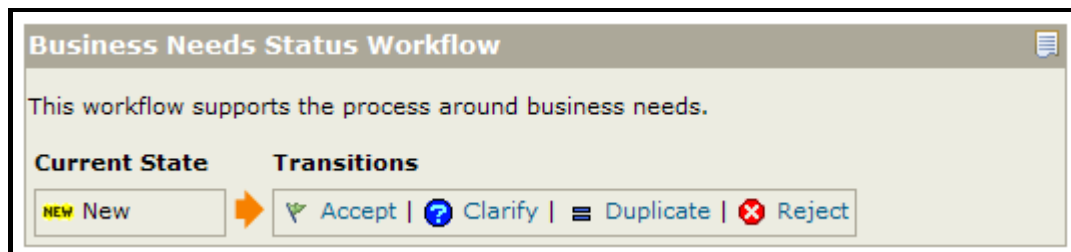


*Figure 8. Transitions for business needs*

The following sections describe how this process is handled in Rational Focal Point.

## ER: Elicit requests for business needs

You can collect business needs in three ways:

- Stakeholders who can access Rational Focal Point can add business needs directly.

- Product managers can collect business needs from customers and link the needs to customer elements.

- Product managers can create business needs directly.

For whichever method you use to create a business need, you complete a similar form.

### Add a business need

You can add a new business need by completing a simple web form. You must specify information in the fields with asterisks. At a minimum, for each business need you must specify a title, description, and justification. You can also specify other attributes.

If the product manager recorded the business need on behalf of a customer who cannot access the Rational Focal Point, the product manager might link the business need to the element that represents that customer. To link the business need, in the Links section of the business need, edit the customers link.

If the business need was created by a customer who can access Rational Focal Point, the Creator attribute records the name of the user in Rational Focal Point. Both the user's name and their company are recorded; for example, Giulia (Quality Communication Corp.).

### Import business needs

Alternatively, you can import business needs from a spreadsheet. Each column in the workspace can be mapped to an attribute in the product management workspace. You can also import pre-existing or heritage data into your workspace.

## AR: Analyze business needs

Check the quality of each new business need during a review phase. If you need more information about a business need, set the status to To be Clarified, which indicates that the need is ambiguous, unclear, or lacks vital information. After the business need is modified, its creator sets the status back to New. At this point, a business need can be Rejected or marked as a

Duplicate. Rational Focal Point contains many display modes that can be used to review business needs.

To select only business needs that have a certain status, you can use a filter .

*Figure 9. Filter icon*

Review each new business need to ensure that the relevant information has been recorded.

You can also review new business needs by using the Review feature. The product manager can review the business needs against a set of checkpoints; for example, Complete and Feasible.
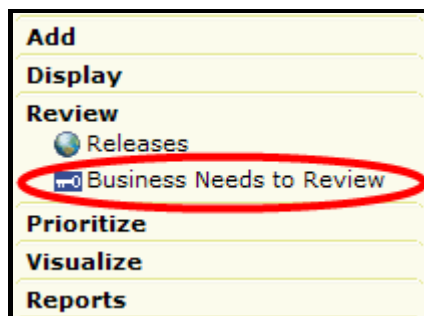


*Figure 10. A business needs view in the Review menu*

The product manager can change thee status of all business needs that are accepted. Ife a business need does not pass the review, you can set its status etc To be Clarified or Rejected.

## PR: Plan business needs for a release

The product manager decides which business needs are developed in a particular release.

After the product manager has a list of the accepted business needse, they can prioritize the needs and make a series of release plans by selecting in which release a business need is developed. If customers prioritize their own business needs, the product manager can use the result of that prioritization to decide which business needs to include.
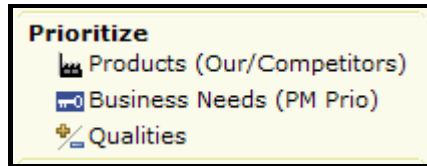
*Figure 11. The Prioritize menu*

The top ranked business needs are those that provide the most value with the least cost and risk. When the product manager has a list of the top ranked business needs, the manager adds a link to the release in the Release attribute for the business needs and changes the status for the business needs to Planned.
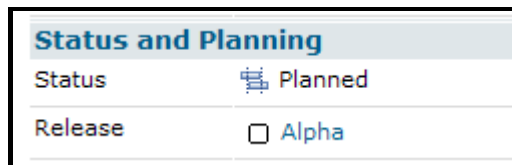


*Figure 12. Setting the status of a business need*

After the release is confirmed, set the status to Planned.

## DTW: Do the work

After the content of a release is selected, the product manager assigns the business needs to developers. The home page for each developer lists the business needs that the developer must implement.

After the implementation work is complete for each business need, the status for each business need must be set to Completed. Developers must update the Actual Effort attribute, in hours, as the implementation progresses. The product manager and other stakeholders use this data to monitor the progress of the release.

## VR: Verify business needs

After a business need is implemented, the developer transfers the business need to the "To be tested" state. Acceptance testing is outside the scope of the default product management template. After the business need passes all tests, the status of the business need is set to Completed.

After the business needs are set to Completed, the related release must be set to Completed. Product managers can use the Review feature to ensure that all aspects of the release are addressed before they launch the release.

# User scenarios

User scenarios are often helpful to understand how to use a product. This section contains a set of scenarios that outline a few activities that you can complete by using the product management template.

## Gizmo, Inc.

Gizmo, Inc. is a fictional consumer electronics company that specializes in manufacturing mobile phone devices.



*Figure 13. The logo for the fictional Gizmo Inc company.*

The following user scenarios follow the actions of Pamela, the product manager for one of the mobile devices. Pamela follows a typical process to create products and deliver them to the market. She interacts with customers, such as Claus; developers; and stakeholders, such as Eric, to ensure that the right product is specified and delivered.

## Gathering market data

### Gathering data from customers

One morning, Claus, a customer, calls Pamela. He and his colleagues have been trying to use the latest release of the software that they purchased from Gizmo, without much success. After he enters all the required information, he gets a time-out error. As a result, all of his information is lost and he must enter everything again. Claus notes that if the product does not work, he will no longer be a reference customer and will consider competitors when he evaluates the next upgrade.

Pamela understands the problem. In fact, many other customers have reported this problem, which has been targeted for a future release. Pamela reviews the release calendar and decides to re-evaluate the scope of the next release and to accelerate the performance improvements. However, she wants to understand what plans might be moved from the release to a future release in order to meet the schedule constraints.

Pamela also views the list of customers that have requested this improvement. She realizes that these customers account for a significant portion of revenue.

As a last step, Pamela views the updated product road map to make sure that it reflects the changes.

To gather market data, in Rational Focal Point, Pamela takes these steps:

1.  Opens the list of customers by clicking **Display** > **Customers**.

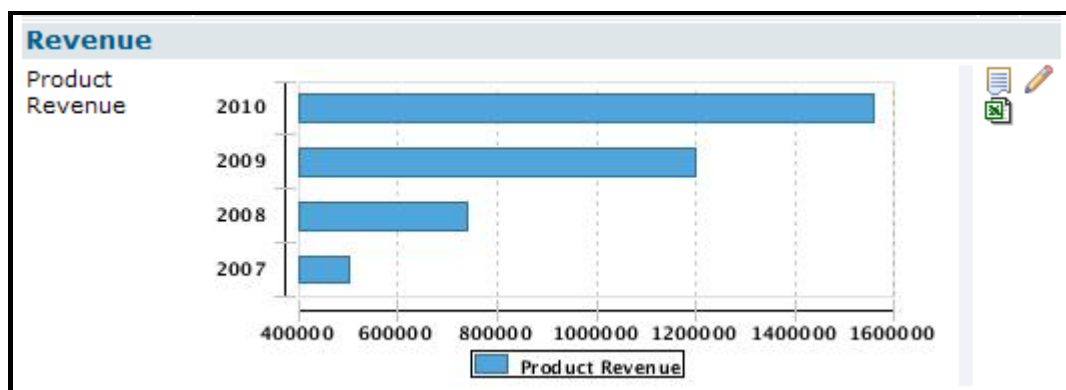2.  Select a customer; for example, Wireless Mobile Devices.

3.  View the revenue for the customer.



Figure 14. The product revenue for a customer

4.  View the business needs for the customer.

*Figure 15. The General Information page for a customer*

5. Pamela views the business needs that Claus raised. She clicks the **Increase battery life, standby time to >= 200 hours** link to view the details of that business need.

*Figure 16. Details of the business need*

The feature that is related to the business need is to be in the Alpha release. Because this release is still in its early phase, Pamela wants to see if the feature can be delivered on an earlier date.

6. To view the schedules for upcoming releases, Pamela clicks **Display** > **Releases** and clicks the Gantt chart icon.



*Figure 17. Gantt chart icon.*

7. Pamela views the plan and decides to add the feature to the next release, Gizmo G890, which already started.
8. For the "Increase battery life, standby time to >= 200 hours" business need, Pamela updates the Release attribute. That feature is now to be implemented sooner than was planned.
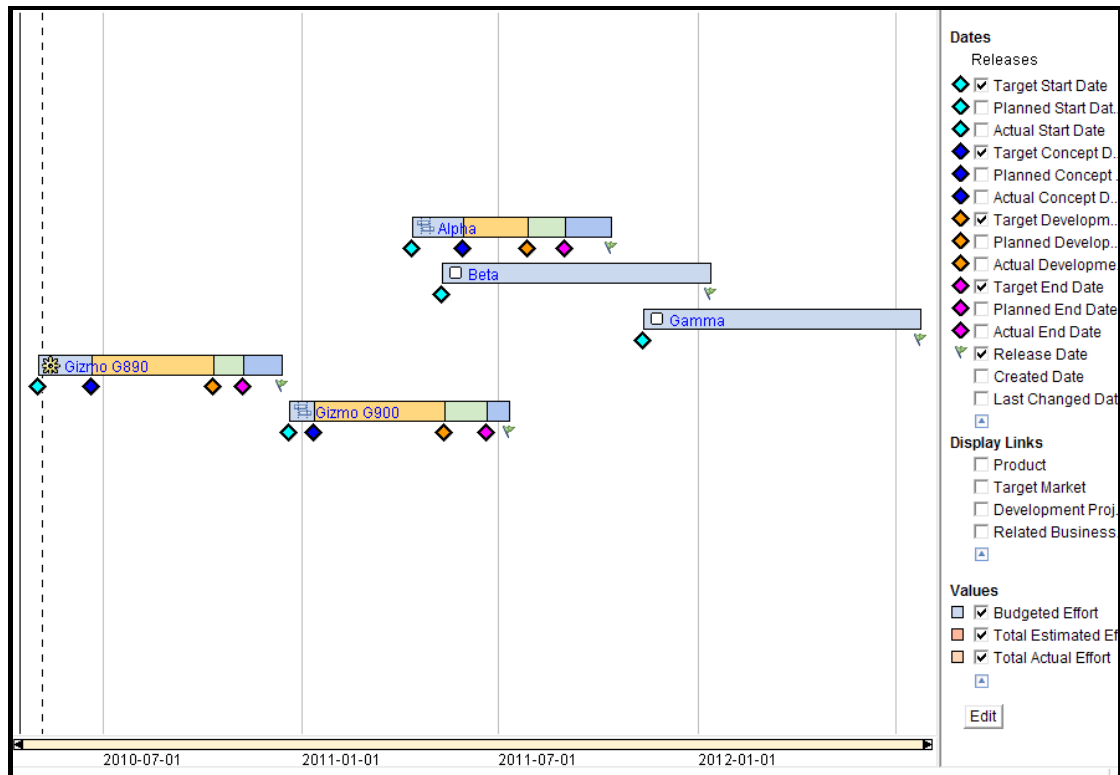
*Figure 18. The release schedule*

**Gathering requirements from prospective customers**

A large medical group that is a prospective customer issues a request for a new device. The request includes requirements that are atypical for Pamela's product. She adds the medical group as a prospect type of customer and adds the new requirements as business needs.

To add information about the request, in Rational Focal Point, Pamela takes these steps:

1.  Click **Add** > **Customer**.

2.  Complete the form about the customer, and click **OK**.

*Figure 19. The Customer information form*

The development manager of the prospect exports the requirements
database to a spreadsheet and sends it to Pamela.

*Figure 20. The spreadsheet contains the requirements for the request*

To import business needs:

1. Click **Display** > **Business Needs**.

2. Select Table mode.

3. In the bottom frame, click **Import Business Needs**.

4. After the import screen opens, browse to the file that contains the requirements. Rational Focal Point matches as many columns in the spreadsheet to attributes as possible. Pamela checks the data to ensure that the columns map to the correct attributes.

5. After the import is complete, the new business needs are available for use in product planning.

**Submitting a suggestion by using email**

Pamela receives an email from a customer who is raising a new business need.
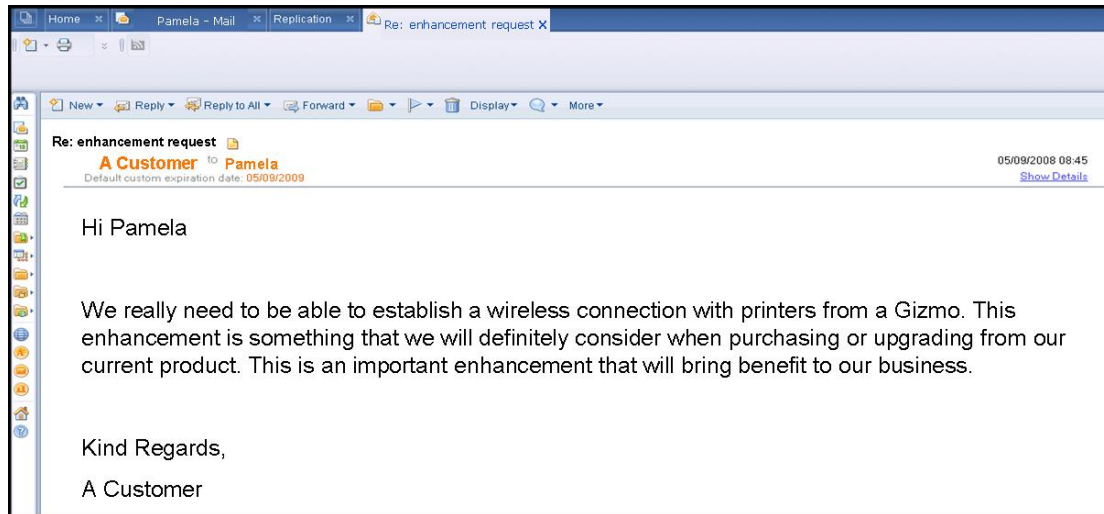
*Figure 21. Email with request from customer*

Pamela formalizes the message and sends it to a certain email address so that the email can be submitted to Rational Focal Point automatically. When Pamela submits the business need from an email, the subject line becomes the Title of the business need, the body of the email becomes the Description of the business need, and the email attachments become files in the Attachments attribute.
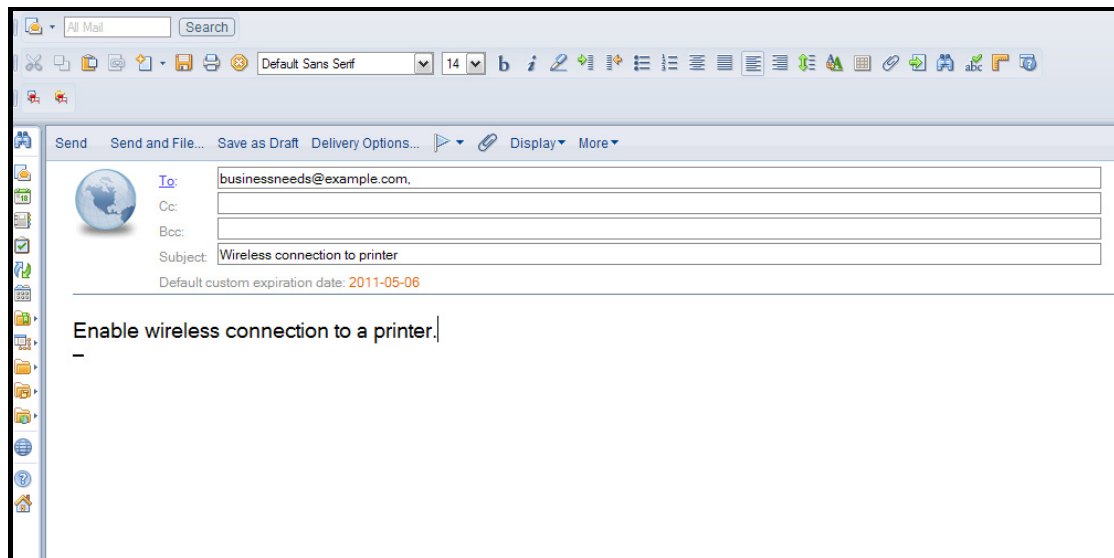


*Figure 22. Pamela sends the business need to Rational Focal Point in an email*

**Adding and prioritizing business needs**

Jim Smith works for General Telephone, a customer of Gizmo, Inc. Jim has several business needs to request. Because General Telephone is an important customer, Jim can access the Rational Focal Point database for Gizmo, Inc. Jim logs in to Rational Focal Point, views his previous business needs, and adds a new business need.

After Jim adds a new business need, he views all his business needs and prioritizes them based on their importance to his company. Finally, he visualizes the results.

Pamela can use Jim's prioritization as she plans her next release. The prioritization indicates the issues that are important to General Telephone.

To add and prioritize business needs, in Rational Focal Point, Jim takes these steps:

1. Click **Add** > **Business needs**.

2. Complete the form about the business need.

3. Display the business needs that were added by clicking **Display** > **Business Needs I Created**.

4. Click **Prioritize** > **My Business Needs (Prio)**. Jim can prioritize his business needs by their importance.

5. During the prioritization, Jim views pairs of business needs. For each pair, he decides which of the following situations apply:

   - A and B are of equal importance.
   - A is weakly more important than B.
   - A is strongly more important than B.
   - A is very strongly more important than B.
   - A is absolutely more important than B.

   After Jim has made a sufficient number of comparisons, the business needs can be ranked.

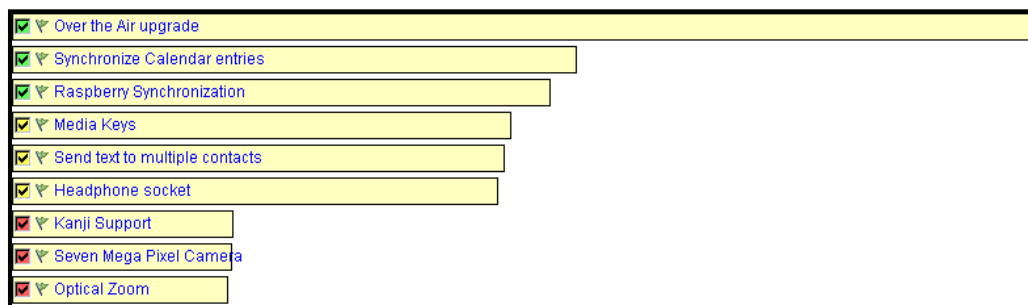6. Click **Visualize** > **My Business Needs (Prio)**.



*Figure 23. The results of the prioritization*

Pamela can now use this ranking to complete the overall prioritization of features for the next release.

7.  To display the results of customers' prioritizations of their own business needs, Pamela clicks **Visualize** > **Business Needs (Ext Prio)**.

## Recording information about a win or loss

Pamela calls a prospect who has become a customer to conduct a win/loss interview. During the call, the customer discusses business needs that they want to submit. Pamela creates the new business needs directly from the win/loss report. For tracking purposes, she links the business needs to the win/loss report and to the customer. She also records the revenue that was gained as part of the win. In the competitor section, Pamela adds a new competitor that is associated with the deal.

To record data about the win, in Rational Focal Point, Pamela takes these steps:

1.  Click **Display** > **Customers**.

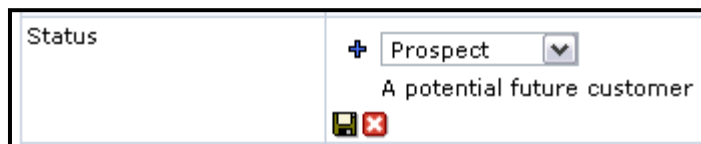2.  In the **Status** field, change the status of the customer from Prospect to Active.



*Figure 24. Changing the status of a customer*

3.  To record the details of the win/loss interview, click **Add** > **Win/ Loss Report**, complete the form, and click **OK**.

    The win/loss report form can be used to conduct a win or loss interview and to record all the important information about the win or loss. That information includes the value of the deal, the competitors, and what affected the win or loss.

4.  During the interview, the customer might mention business needs. To record a business need, in the lower frame, click **Add Business Needs**.

    After the report is completed, it is displayed on the product manager's home page in the "Win/Loss reports that have been updated during the

last 30 days" section. To open the home page, in the upper frame, click **Home**.

## Defining the next release

Pamela must suggest an appropriate set of business needs for the next release of the product. She must present this to the product management board for their approval.

First, Pamela visualizes a selection of accepted business needs. Previously, Pamela prioritized the business needs based on information from the market organization at Gizmo. She views the total score for all markets to see which business needs are most valuable for all markets. She also considers the implementation cost. Based on the overall result, she selects the optimal set of business needs to use. These business needs are part of the next release.

To define the next release, in Rational Focal Point, Pamela takes these steps:

1. Click **Visualize** > **Business needs (PM Prio)**. Pamela views the results for a market; for example, the APAC market.
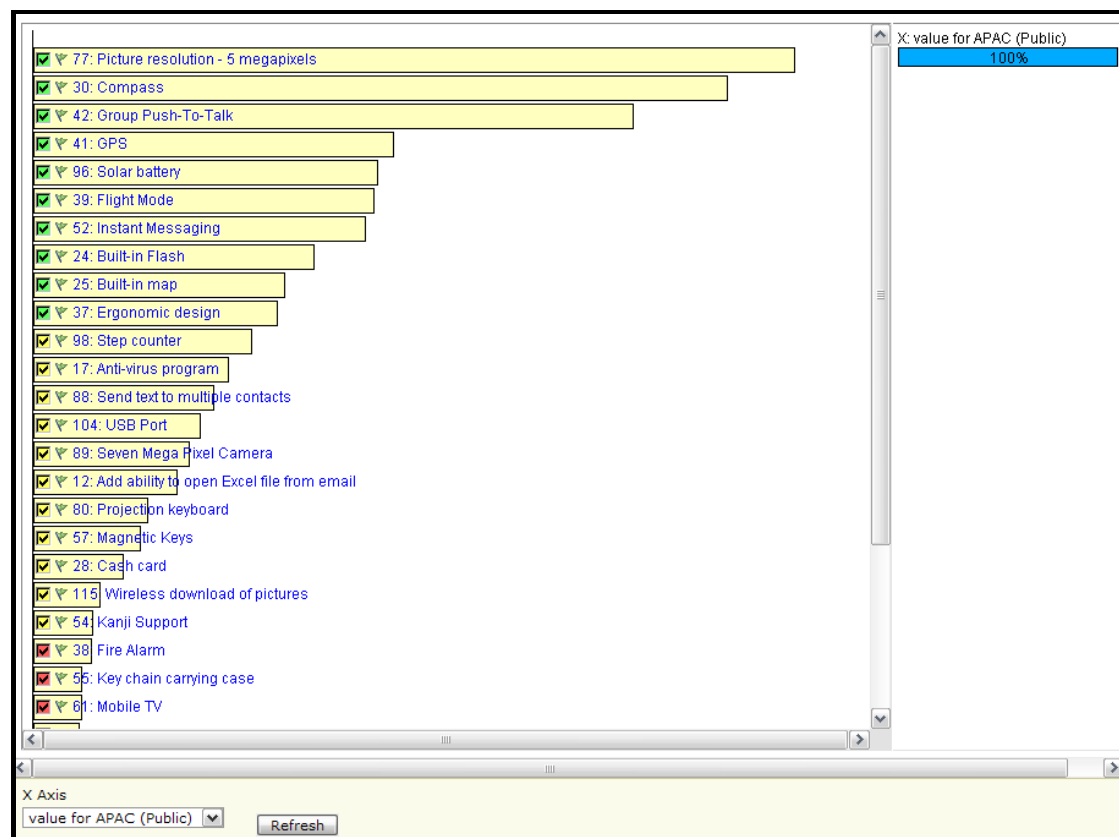


*Figure 25. The results of the prioritization of business needs*

2. Pamela selects the EMEA market and notes its priorities. To view another market, under the list of business needs, she selects a market from the drop-down list.
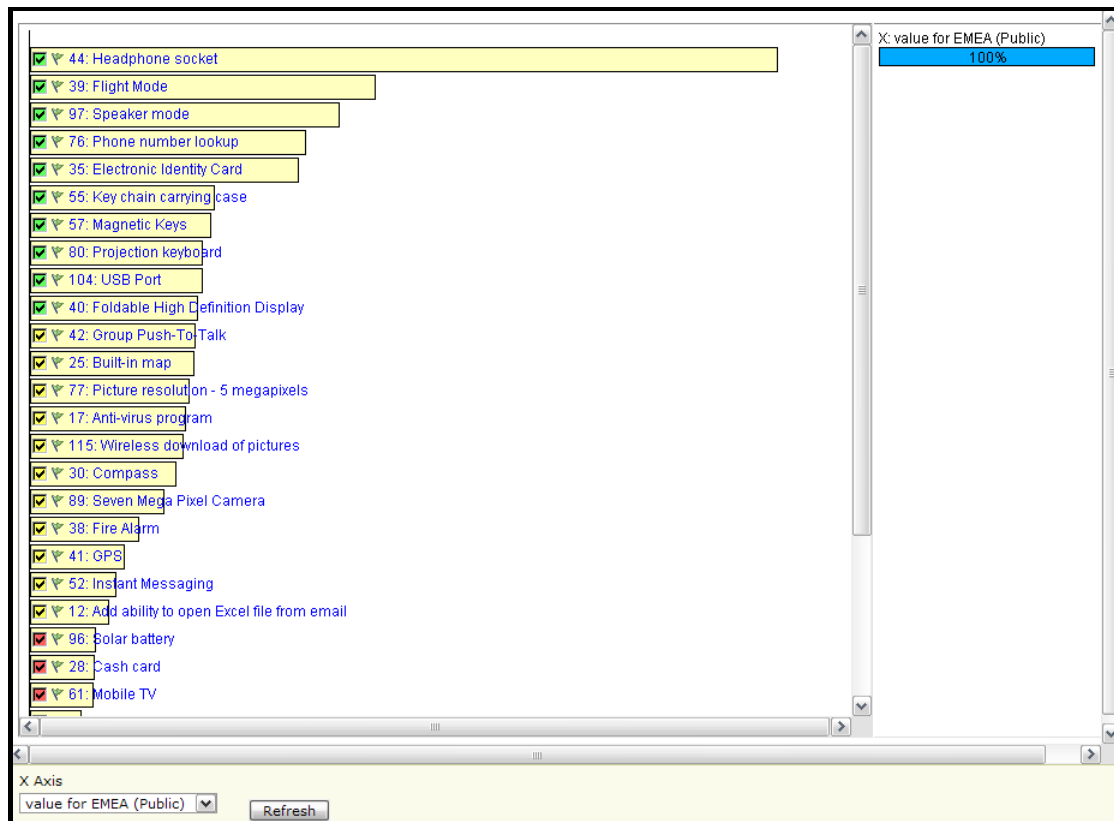


*Figure 26. Selecting the EMEA market*

3. Pamela considers two other markets, NA and SA. She also considers which markets match the product road map. Pamela views the total score for all markets in a stacked bar chart by clicking the **stacked bar chart** icon.


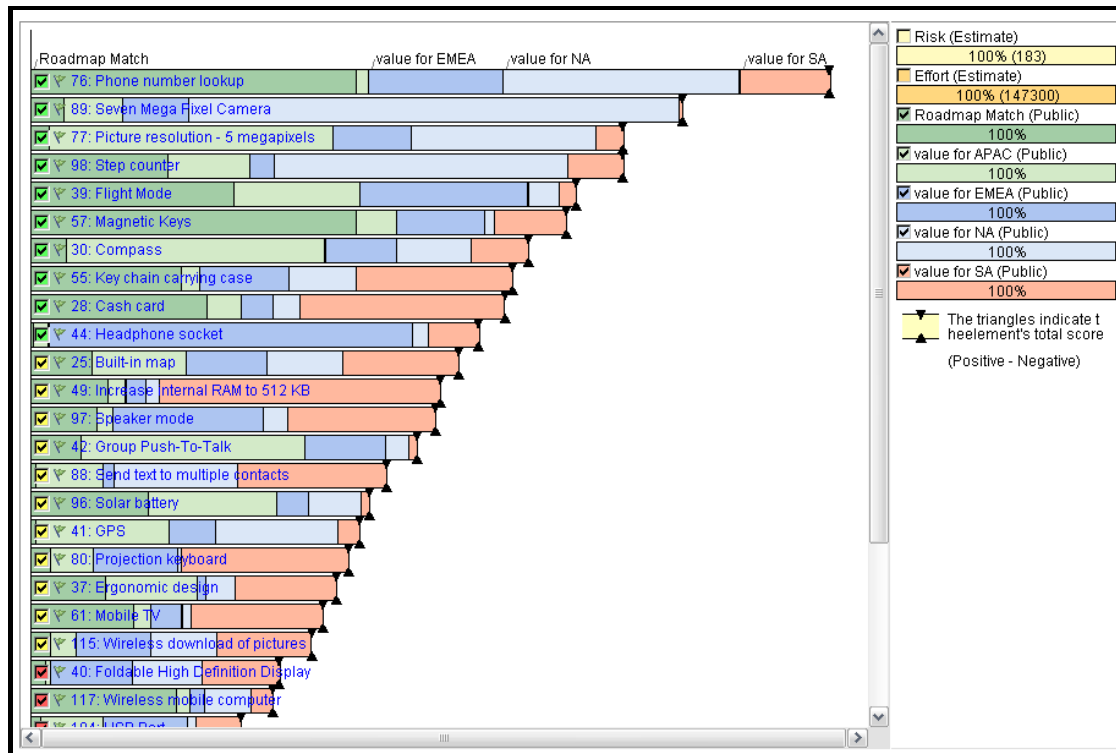
*Figure 27. Stacked bar chart icon.*

*Figure 28. The business needs for several markets and their relation to the road map*

In the chart, the top business needs are those that provide the most value for all markets and are also most in agreement with the road map and company strategy. However, Pamela has not yet considered the implementation effort and risk.

4. In the frame to the right of the chart, she selects the Effort and Risk criteria.
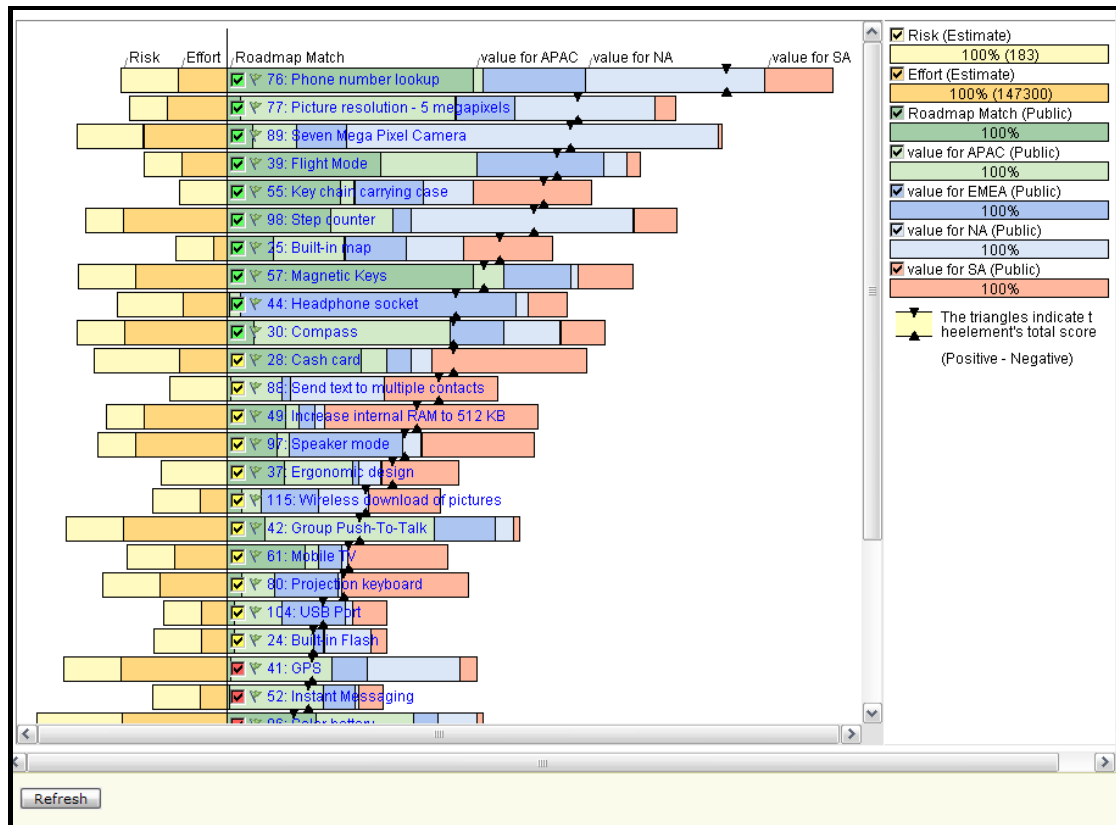
*Figure 29. The business needs for several markets measured against Risk, Effort, and the road map*

With the additional criteria selected, the top business needs in the list are those that provide the most value and least effort and risk to all markets. Pamela cannot implement all of the business needs because of resource and cost constraints; she must select a few business needs. She excludes the needs that provide less value and more effort and risk.

5. Pamela clears the bottom business needs in the list, which have red check boxes.

   After those business needs are excluded from the scope, Pamela sees that the value has been maintained between 80-90%. However, the effort has decreased to 65% and risk has decreased to 62%. Pamela includes the top-scoring business needs in the next release.

6. Pamela right-clicks the list and selects **Edit All Checked Elements**.

7. She updates the status to Planned and the release to Gizmo G900.

## Creating reports

One of the teams that Pamela works with is document-based. That team wants a document that contains all the business needs and information about why they are creating the product. Pamela decides to give that team the business need document because it provides market and customer background information.

To create the report, in Rational Focal Point, Pamela takes these steps:

1. Click **Display** > **Business Needs**.

2. Create a filter to show only the business needs that are in the release.

   a. Click the **Filter** icon.



*Figure 30. Filter icon.*

   b. For the Release attribute, click the **Edit** link.

   c. Select a release.

   d. Click **OK** twice to save the filter. This filter will show only the business needs that are included in a certain release.
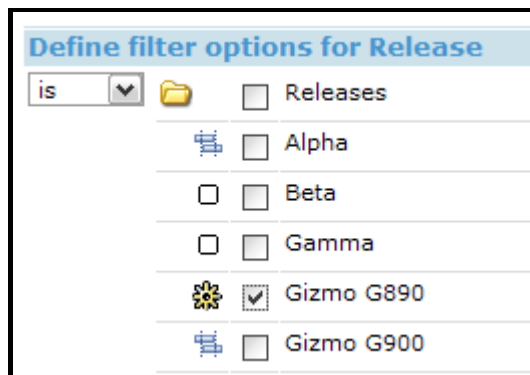


*Figure 31. Defining a filter*

3. Print a quick report of the business needs:

   a. Click the **Quick report** icon.



*Figure 32. Quick report icon.*

    b. Select the format, paper size, and orientation. For the template, select **Standard Report Template**. Click **Next**.

    c. Specify the Header details and click **Generate Report**.

    d. Open the report by clicking the **here** link.

## Comparing performance and sales targets

The Gizmo G9 product is underperforming compared to its original targets. Pamela and Eric, an executive stakeholder, receive an email about the poor performance. Pamela reviews the geographical markets to see if the problem can be isolated. The under performance is mainly in the APAC market. Her analysis of wins and losses in the APAC market indicates that a new competitor is perceived well because of its great performance and ease of use.

To analyze product performance, in Rational Focal Point, Pamela takes these steps:

1. Click **Display** > **Our Products** to view the information about products in the APAC market.

2. In the Revenue Info section, view the product information. In an area where the APAC market was targeted to have greater revenue, the revenue is declining.

**Revenue Info**

| Target Revenue | | Yr 1 | Yr 2 | Yr 3 | Yr 4 | Total | |
|---|---|---|---|---|---|---|---|
| | EMEA | 350 | 550 | 450 | 670 | 2 020 | |
| | NA | 300 | 200 | 100 | 100 | 700 | |
| | SA | 500 | 600 | 700 | 1 000 | 2 800 | |
| | APAC | 1 100 | 1 200 | 1 000 | 900 | 4 200 | |
| | Totals | 2 250 | 2 550 | 2 250 | 2 670 | 9 720 | |

| Actual Revenue | | Yr 1 | Yr 2 | Yr 3 | Yr 4 | Total | |
|---|---|---|---|---|---|---|---|
| | EMEA | 400 | 500 | 500 | 700 | 2 100 | |
| | NA | 200 | 200 | 200 | 100 | 700 | |
| | SA | 450 | 600 | 800 | 1 200 | 3 050 | |
| | APAC | 1 200 | 1 000 | 750 | 400 | 3 350 | |
| | Totals | 2 250 | 2 300 | 2 250 | 2 400 | 9 200 | |

| Performance vs Target | | Yr 1 | Yr 2 | Yr 3 | Yr 4 | Total | |
|---|---|---|---|---|---|---|---|
| | EMEA | 50 | -50 | 50 | 30 | 80 | |
| | NA | -100 | 0 | 100 | 0 | 0 | |
| | SA | -50 | 0 | 100 | 200 | 250 | |
| | APAC | 100 | -200 | -250 | -500 | -850 | |
| | Totals | 0 | -250 | 0 | -270 | -520 | |

*Figure 33. The Revenue Info section*

3. The Links section indicates that the product has many competitors and that it has lost two potential customers.

*Figure 34. The Links section*

4. Click a win/loss report to analyze it in detail. Consider these questions:

- What qualities did the prospect think were important?

- What was the value of the account?

- Which features can be implemented to improve the position for future deals to beat the competition?

5. To display details about the APAC market, click **Display** > **Geographical Market**. View the details about the market size ($) and potential growth. Analyze the data. For example, if the market is big and potential growth is great but market shares are being lost to a competitor, what actions must be taken?

## Creating strategy based on visualization and prioritization

Pamela presents to the product strategy team once every quarter. For the first quarter meeting, Pamela is asked to share her thoughts about the strategy to change the positioning of the devices in the Gizmo portfolio.

The strategy team consists of the following individuals:

- The director of software development
- The senior solution architect

- The vice president of sales

- The vice president of marketing

- The CEO

- The vice president of products

To prepare for the meeting, Pamela gathers the market information for each geography. She prioritizes the qualities that the different regions think are important. She also gathers information about competitors to provide an overview of the market.

Pamela meets with the strategy team to ensure that they take a suitable approach for the devices that are being developed and launched. Pamela asks the strategy team to visualize the different markets. This visualization is not based on a pairwise comparison prioritization, but on values.

To view and analyze market information, in Rational Focal Point, Pamela and the strategy team take these steps:

1. Click **Display** > **Markets**.

2. Make sure that the following attributes have values:

   - Competitive Saturation: Calculated automatically based on the number of products that are linked to the market

   - Market Growth: For each geographical market, the potential growth in percentages

   - Market Size: For each geographical market, the market size in dollars

3. Click **Visualize** > **Markets** to display the ranking based on the values. Click the **stacked XY chart** icon.
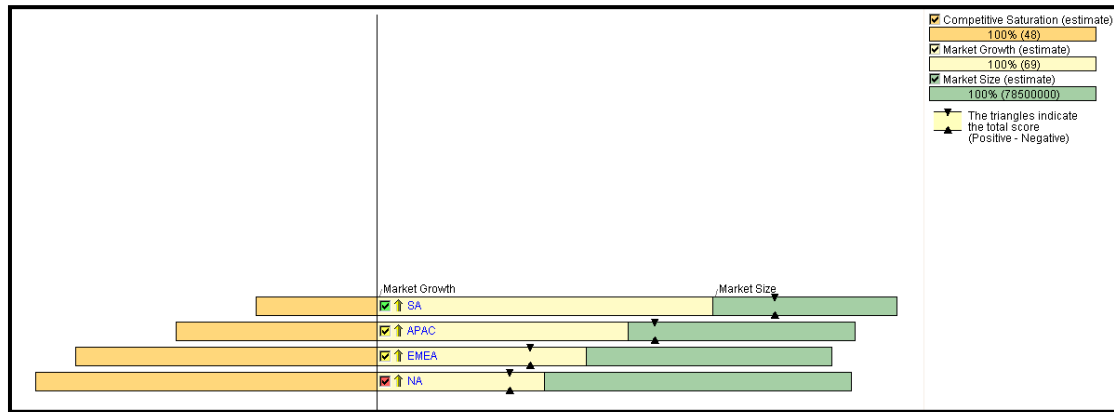
*Figure 35. The markets are ranked in the stacked XY chart*

The strategy team prioritizes the product qualities based on each of the markets.

4. Click **Prioritize** > **Qualities**.

5. Make pairwise comparisons of the qualities based on which has the highest value for each geographical market. Make comparisons until the number of completed comparisons is equal to or higher than the number of recommended comparisons. Analyze the next market by selecting the market from the **Criterion** drop-down list. Continue comparing until all markets are evaluated.

*Figure 36. Making pairwise comparisons about the market*

6. View the results of the prioritizations and the ranking of the overall value of each quality for the different markets by clicking **Visualize** > **Qualities**. Click the **stacked XY chart** icon again.
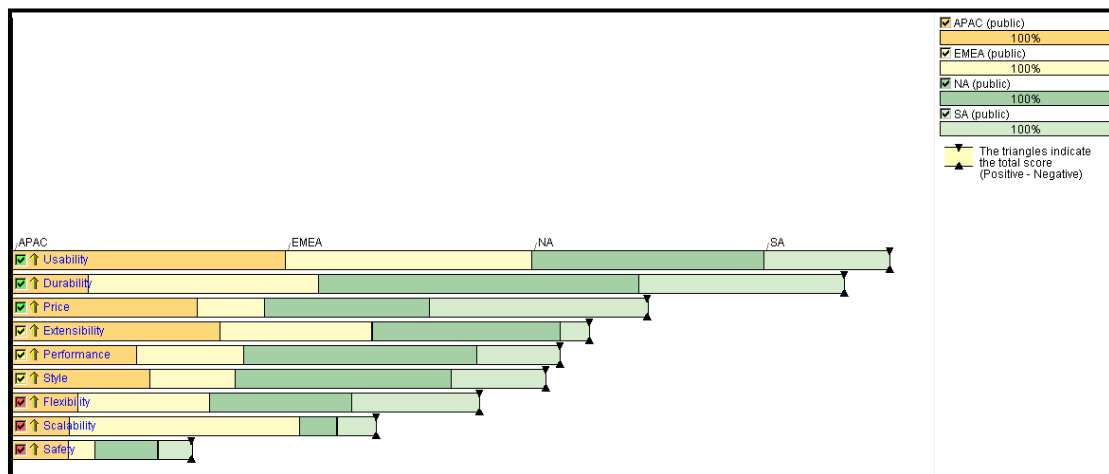


*Figure 37. The results of the prioritization, shown in a stacked XY chart*

Based on the qualities, the strategy team prioritizes the Gizmo products and competitor products.

7. Click **Prioritize** > **Products (Our/Competitors)**.

8. Compare the products based on the qualities.

   - Compare the products until the number of completed comparisons is equal to or higher than the number of recommended comparisons.

   - To compare against a different quality, select a quality from the **Criterion** drop-down list.

After they compare the products, the strategy team can view the overall ranking of the products in the market. They are pleased to see that the overall top phone is the Gizmo G900.

9. Click **Visualize** > **Products (Our/Competitors)**. Click the **stacked XY chart** icon.
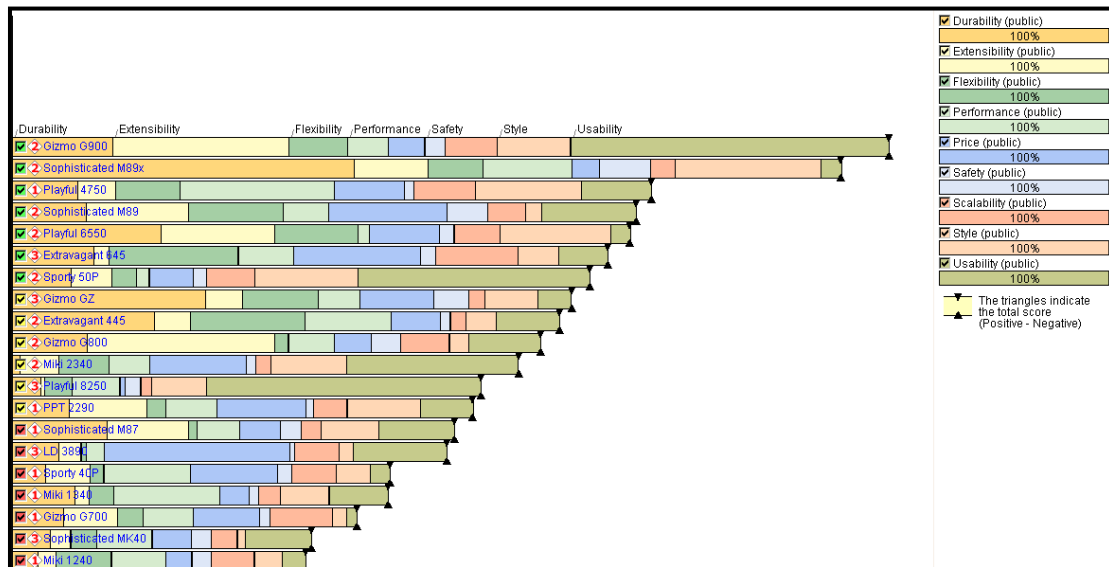


*Figure 38. The results of the prioritization based on qualities*

The strategy team views a scenario in which the only two qualities of importance are Usability and Performance. The Gizmo G900 product is in second place; a competitor's product, the Playful 8250, is in first place. By switching the qualities, the team can view different scenarios.
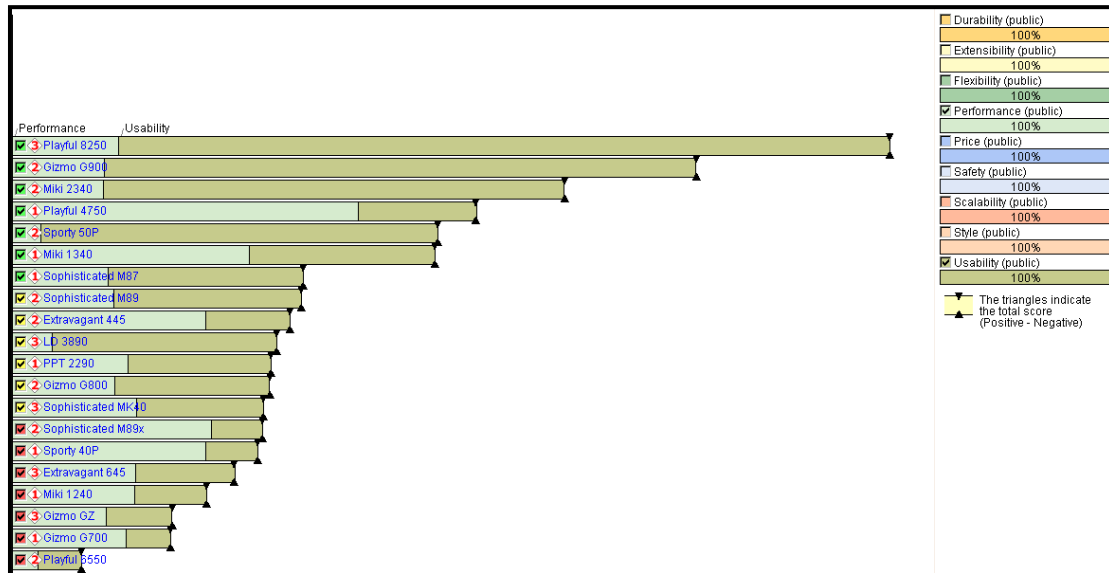
*Figure 39. The results of the prioritization for usability and performance only*

## Updating the product road map with a new release

Gizmo requires product managers to maintain a rolling 18-month road map. To update the road map, Pamela creates a release. With this release, Pamela is introducing a new version of a product that will be aimed at the outdoor pursuits market. She adds market information about the product, and identifies its competitors.

To update the road map, in Rational Focal Point, Pamela takes these steps:

1. Click **Add** > **Release**.

2. Complete the form about the release.

   a. For the Products attribute, select the existing product.

   b. Enter the target dates for the release.

   c. Click **OK** to save the form.

3. Click **Display** > **Our Products**.

4. For the selected product, update these attributes: Market Perception, Geographical Markets, Industry Markets, and Competing Products.

5. Click **Display** > **Releases** and click the **Gantt chart** icon.

The Gantt chart displays the releases on a time scale, with start and end dates, milestones, estimated and actual resource values, and linked data.

## Releasing the product

The development of the product has gone according to plan. In the last seven weeks, the team increased the quality of the product by removing over 600 defects.

The stakeholders fulfilled all the checkpoints to launch the product. Pamela schedules a final review of the deliverables that are related to the product launch. At the meeting, no new issues are raised and Pamela decides to release the product.

To review the product, in Rational Focal Point, Pamela takes these steps:

Note: To review the release, it must have the Completed status.

1.  Click **Review** > **Releases**. The checkpoints that must be met to launch the release are displayed. The review checkpoints are configurable and might include these events:

    - Website updated
    - Documentation completed
    - Marketing material
    - Support training
    - Sales training

*Figure 40. Reviewing checkpoints for a release*

2. Based on the question that is displayed, indicate how well the checkpoint was met by selecting a score on the ranking scale. For checkpoints that are not fulfilled, indicate the severity and the product manager who must correct the problem.

3. Repeat step 2 until all checkpoints are analyzed.

Note: At any time during the analysis, click the **Action List** icon to view the outstanding work for the checkpoints.



*Figure 41. Action list icon.*

*Figure 42. Verifying that a checkpoint is completed*

After all checkpoints are correct, the release can be launched.

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