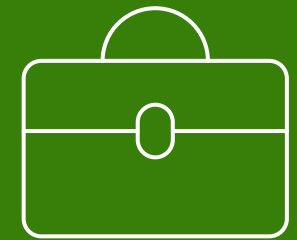# A TOOLKIT FOR PRODUCT MANAGERS

APPS, SOLUTIONS, & RESOURCES PRODUCT MANAGERS NEED TO SUCCEED

ProductPlan

Table of Contents

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Introduction

Why We Wrote This Guide

Wilderness survival instructors will tell you that skills and knowledge are more important than gear. If you're lost in the woods in winter, that expensive hatchet you brought won't do you much good if you don't know how to make a fire and build a shelter for the cold night ahead. A similar principle applies to product managers.

It's your skills, not the tools you use, that will make you successful in product management. But just as a lost camper will benefit from having a quality hatchet, product managers can be much more efficient and effective with the right tools.

There has been a rapid increase in the number of tools available to product managers (PM) in the digital age. Luckily, you can find affordable, easy-to-use apps to help you at every step of the way as you take a new product to the market and beyond.

We wrote **A Toolkit for Product Managers** because, as a roadmap software for product managers, we've seen our users and other product managers struggle with building and balancing the perfect product stack to fit their needs best.

Whether you're a new product manager or seasoned product manager, the following is a comprehensive list of product management tools and resources to help you succeed in your role.

Digital Apps Are Central to the Modern Product's Journey

We've also suggested the apps we recommend in each category and why some product manager's might benefit with having a certain tool over others.

Finally, we have some great educational and self-improvement resources to keep you growing and improving throughout your product management career at the end of **A Toolkit for Product Managers**. *Enjoy!*

Let's build a product →	**Brainstorming** — Collaboration and idea-capturing tools	**Market research** — User feedback tools

Feature planning — Prioritization tools	**More market research** — User feedback tools	**Prototyping** — Design and wireframing tools

Sprint planning — Project and task management tools	**Release planning** — Collaboration and task tracking tools	**Testing** — OA and testing apps

← Product launch	**Updating product strategy** — Data analytic tools	**Beta release** — Usage and data gathering tools

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Tools Amplify Your Skills

A quick note before we jump in, although the tools we're about to discuss can do a lot for you and your products, they are only a means to an end. These tools can make you more efficient, data-driven, and effective at carrying out your responsibilities as a product manager (PM). But ultimately, your success will depend on your ability to:

- Develop and build an evidence-based case for your product strategy

- Persuasively communicate your strategy to all relevant stakeholders

- Build and maintain alignment and enthusiasm among your entire team

Avoid app dependence and overload.

Think of your product management tools as resources to amplify the skills you already have—such as thinking strategically and leading your team.

If you can do that, you'll avoid the trap many product managers fall into today: forgetting that their job isn't working in apps, it's **building successful products.**

Now without further ado, let's talk tools!

A Guide to Product Management Tools and Resources

Brainstorming and Idea-Capturing	Collaboration and Productivity	Demo and Tutorial Creation	Video Communication	Product Roadmapping	Team Messaging
Writing Assistance	Project and Task Management	Competitive Review	Data Analytics	Product Analytics	Design and Wireframing
User Feedback	Usability Testing	Customer Journey Messaging	Collaborating with Engineering	Podcasts	Books

Note: You'll see this icon beside some of the tools we discuss in this toolkit. It indicates the app integrates into ProductPlan's roadmapping software.

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Brainstorming and Idea-Capturing

Brainstorming is a team sport. When it's time to pull your team together to discuss ideas for a new product or new features for an existing one, you'll want a tool that makes it easy for everyone to share their thoughts. You will need to find something that makes it easy to refer back to all the captured ideas and content your team contributes.

If you're jotting notes on a whiteboard in the conference room or using colored pens and a flipchart, it can be challenging to track every idea and simultaneously enabling your team to see them all at once. Plus, how will you record everything for future reference? Digital idea-capturing tools are especially helpful when not everyone on the team can be in the same room as you.

We recommend:

MURAL

Here's an excellent tool for brainstorming and digital collaboration. MURAL is a digital real-time whiteboard, where team members can jot ideas, add virtual sticky notes, and even draw or drop in images. Anyone can then access the saved whiteboard file online.

Confluence

Confluence by Atlassian is a versatile app. It can be used as a team chat app, a task management app, or as a company wiki. As a wiki, Confluence can serve as a great brainstorming tool, where team members can upload ideas, drawings, attachments, links, and other content.

Note: Confluence integrates with ProductPlan, which lets teams embed a live version of their roadmap into their shared Confluence environment to keep everyone aligned on strategy.

Use these apps to:

- ☐ Capture and display ideas in brainstorming sessions.
- ☐ Create an easy-to-access archive of the team's ideas and suggestions over time.

Collaboration and Productivity

For any modern product team to be successful, team members need a convenient and reliable online app to share and review up-to-date files and other content.

Email falls short here, for several reasons.

1. Files can get lost in old email threads
2. Version control becomes a problem
3. Unless they can see all file versions at the same time, team members won't know whether the latest version is File_v3, File_v2-edited, or File_v1—approved.

With online collaboration and productivity apps, a product team can create a single source of truth for the product's progress.

We recommend:

Dropbox
Great for maintaining a single-source-of-truth version of key files such as the product backlog, sprint backlog, or a burndown chart.

Google Drive
Similar to Dropbox, you can maintain all of your remote team's key content in a single online location. Anyone on the team can access it, add comments, and check-in with these files to make sure they are still working toward the team's strategic goals.

Use these apps to:

☐ Keep a shared online directory of files the product team can upload and review: wireframes, user research, the roadmap, etc.

Demo and Tutorial Creation

For software product companies, it's a great idea for product managers to record product walkthroughs. These can be useful as both tutorials for your internal team, existing customers, and marketing tools to entice new users to try the product. Recorded product demos and tutorials have many other applications as well. They can also help sales reps demonstrate the product's value to prospective buyers. They can be useful for sharing with industry reporters and analysts interested in covering the product. Additionally, they're excellent for training new salespeople and customer success team about how the product works.

We recommend:

Camtasia

This tool captures your onscreen actions as video and makes it easy to edit. Product managers can use this app to create how-to tutorials, software demos, and online training videos.

iorad

iorad follows you as you move through an app. As you go, it takes screenshots and automatically converts your actions into tutorial text. It is then instantly exportable as a tutorial, video, or step-by-step instructions. Product teams use it to document app workflows and create user documentation.

Use these apps to:

☐ Create video-based tutorials, sales demos, training for sales and support.

☐ Turn your videos' text transcriptions into user documentation and help content.

Video Communication

A big part of a modern product manager's role involves talking with people—customers, prospects, industry analysts, coworkers in different locations, etc. Some of these communications can work by phone or even email. But a sophisticated PM wants to glean as much information from every conversation, and often that requires a face-to-face meeting.

Sometimes going out and meeting with people isn't feasible. Putting together an in-person user focus group, for example, might be too costly for the company's budget. In these scenarios, having a video conferencing solution can be invaluable.

We recommend:

Zoom

Sometimes you have a meeting topic that requires more fruitful communication than an email or Slack message. If you're presenting your roadmap to a distributed team, then a video conference with a platform like Zoom can give you more opportunity to convey strategy, to show enthusiasm, and to get a better sense of whether your team is grasping your explanation.

GoToMeeting

Here's another great online meeting app that, like Zoom, uses the computer's camera to allow everyone on your team to see each other during your conversation.

Use these apps to:

- Conduct meetings with a distributed team.

- Conduct interviews with remote job candidates.

- Host virtual customer advisory board meetings or focus groups, etc.

Product Roadmapping

To capture, communicate, and align the team around a product's strategy, a product manager needs a roadmap. It's the strategic blueprint, the reference point anyone on the team can check in with to make sure they're still on track and working toward the right goals.

We recommend:

ProductPlan

Create a beautiful product roadmap in minutes, then update it just as easily anytime, from anywhere. PMs can also add, move, or delete content from the roadmap with simple drag-and-drop functionality.

With ProductPlan's app, product managers can build their roadmaps around strategic themes, associate epics with those themes, include data supporting each item, and even add metrics such as "Percent Complete" to a given item on the roadmap.

When presenting their roadmaps, PMs can also easily adjust to the best view for the audience—showing revenue estimates and other business goals in an executive meeting, for example, and more tactical detail to the development team.
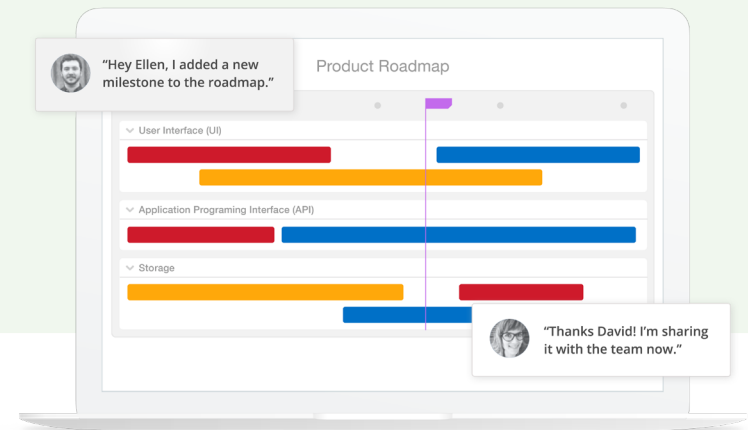
Try ProductPlan Free for 14 Days   **Get started**

Use this app to:

☐ Create, maintain, and share visually compelling roadmaps with all of the right stakeholders on your team.

☐ Maintain a single-source of truth company wide for your product strategy.

ProductPlan

Team Messaging

One of the most important aspects of a product manager's role is communication. The PM needs to stay in regular contact with the team to keep them informed. PMs also need to be accessible to their teams. But as everyone gets busy with their own work, sometimes the fastest and least-disruptive methods of communication can be the most effective.

To keep everyone on the cross-functional team connected through the product's development, a team messaging app can be an effective tool. And it can be even more valuable when some members of the team are remote.

We recommend:

Slack

Slack describes itself as the smart alternative to email. But the app can do a lot more than that. Slack essentially lets teams build a shared digital workspace online. They can get instant messages in real-time, either one-on-one or with a larger group. Teams can share files, links, videos, and other content and keep an archive of all of these communications over time.

Note: Because Slack integrates with ProductPlan, product managers can use the app to automatically send updates to the appropriate channels whenever they adjust the roadmap. It's an effective way to keep your team informed of strategic changes without having to send everyone an email.

Use this app to:

- Stay accessible to your team and respond quickly to their product-related questions.
- Alert your team to new product stats or roadmap updates.
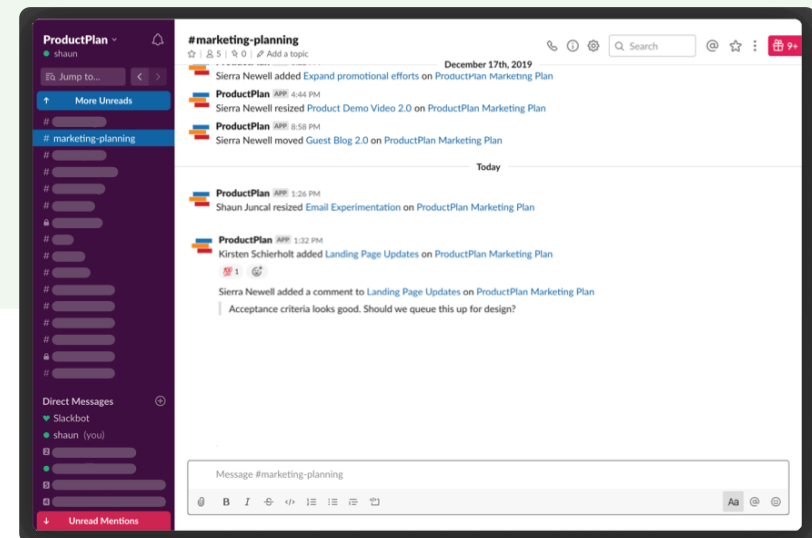
Writing Assistance

We've just discussed using real-time messaging to stay connected throughout the day with your team, and to send them the updates they need to know how to keep them on track with your strategic objectives. That brings up an important reminder about your written communications.

You will need to do a lot of writing in your role as a product manager: for presentations, user stories, scripts for product demos, customer survey questions, etc. Given how often you will be writing, and how important it will be to make those messages understandable and persuasive, you should have a tool that checks your written words for clarity and grammatical accuracy.

We recommend:

Grammarly

Grammarly automatically identifies spelling and grammar issues in your documents. You can use the app for free by adding it to your web browser. If you pay for a subscription, the app will also evaluate the tone of a document and tell you if it comes across as informational, friendly, or persuasive.

Use this app to:

☐ Make sure your words will resonate based on your goal, whether it's an informational product update, a friendly blog, or a persuasive product pitch.

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Project and Task Management

After a product team reviews the roadmap and agrees on the product's big-picture strategy, the team begins translating that strategy into specific tasks and assignments.

In an agile company, for example, the product owner takes on the role of project manager and breaks down the high-level roadmap plans into individual tasks the team can complete in a given two-week or one-month sprint.

Project management and task management apps are a great way to assign and keep track of all of these jobs, and to enable individuals and the team to monitor progress over time.
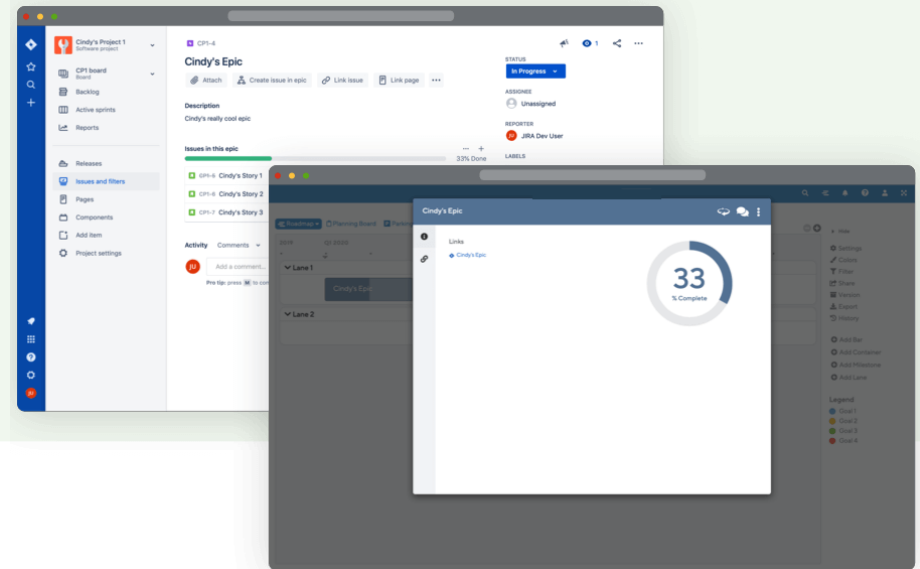
We recommend:

Jira

Jira is an excellent tool for product owners and project managers to assign, track, and update all of the task-level responsibilities assigned to each member of the product team.

And because Jira integrates with ProductPlan, teams can sync the progress of their day-to-day tasks and the roadmap itself.

Trello

Like Jira, Trello is an excellent project management tool. What sets Trello apart, though, is its visual, Kanban-style presentation. When a team sets up its product development work in a Trello board, it can create a highly visual display of its work in progress, completed tasks, blocked jobs, etc.

Trello integrates with ProductPlan, so teams can sync the progress of their day-to-day tasks and the roadmap itself.
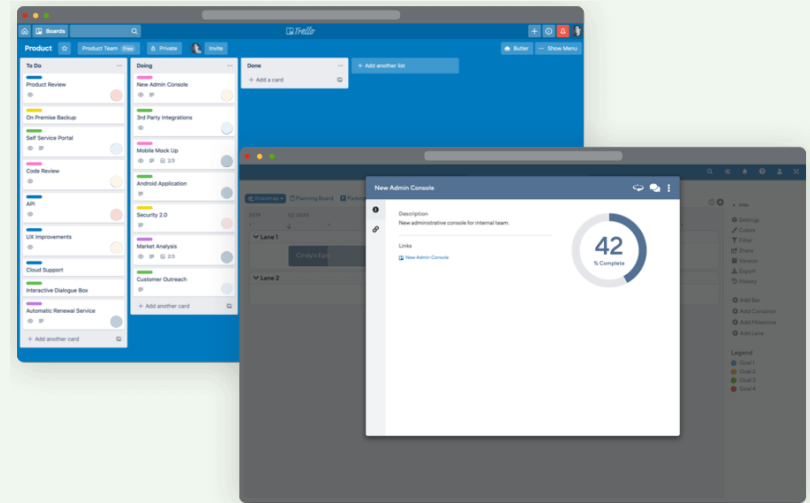
Azure DevOps

It's a bit different from the other task management tools we've discussed because it's designed specifically for development teams. Even though you might not be using Azure DevOps directly as a product manager, it's a great tool to suggest for your developers. It can help them manage their code's version control, plan and track software testing plans, and even deploy their software to various test environments before publishing it live.

Another reason to recommend Azure DevOps to your development team is that it integrates with ProductPlan. It will help your product and dev teams stay more closely aligned because you can keep the roadmap updated as dev makes progress on its work.
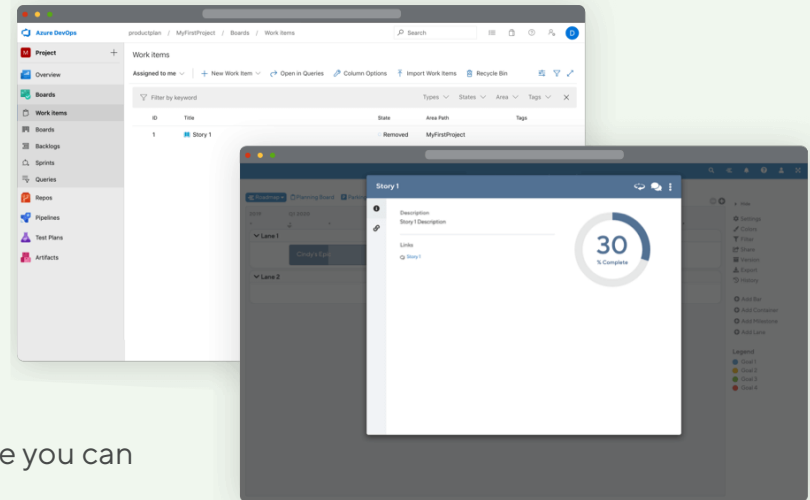
Use these apps to:

☐ Assign and track tasks to the team and stay up to date about the product's development progress.

☐ Sync the progress of the team's day-to-day tasks to progress updates on the roadmap.

ProductPlan

Competitive Review

Successful product managers need to have a deep understanding of competitive products. They'll need to know where their product beats the competition, which features it has in common with the others in the field, and where its product has gaps that need to be filled in order to win more business.

We recommend:

Google Alerts

Google Alerts can be set up for any topic or brand name. Product managers can use it to track the latest news from their competitors, catch blogs and articles comparing offerings in their product category, and keep up to date on relevant technologies.

Talkwalker

Where social media is a big part of a product category's market presence, product teams can use Talkwalker to monitor social channels and provide key analytics on brand performance. Product managers use it to gauge social media's impact on their brand and those of their competitors, understand customer opinions, and understand how their positioning resonates with prospects.

Meltwater

Meltwater provides a 360° view of your market landscape. Product managers can use it to benchmark a product's marketing performance versus that of a competitor. Product teams can also use it to get a deeper understanding of their marketplace, ensure their product roadmaps are in sync with direction changes in the market and improve product projections by understanding the ebb and flow of the business landscape.

Use these apps to:

- ☐ Track competitor news, find relevant industry articles, and stay informed about tech changes that could affect your business.
- ☐ Gain a deeper knowledge of your marketplace, improve product projections.
- ☐ Compare competitors' customer reviews and online presence to fine tune your own positioning.

ProductPlan

Data Analytics

With growing competition in every industry and customer expectations continuously increasing, product managers today need more than their gut instinct to make product decisions. They need data-driven business intelligence. For companies that make digital products, as well as businesses that market and sell products or services online, web-based data analytics tools are a must-have.

We recommend:

Google Analytics

The most well-known of the web analytics tools, Google Analytics, lets companies better understand their website traffic. Due to the many types of data Google Analytics can track—specific pages visited, time on a page, search terms entered on the site—a product team can gain a sense of what their market is and isn't interested in.

Geckoboard

Geckoboard aggregates and visualizes data from different tools to enable companies to track and analyze their app and website activity.

Use these apps to:

☐ Understand which aspects of your site, ads, or online content are resonating with audiences, and which aren't.

Product Analytics

Product analytics refers to capturing and analyzing quantitative data through embedded tools that record how users interact with a product. This type of usage data can include the most frequently accessed features of a product, the average time users spend taking a specific action, and a map of each user's journey through the product.

Product analytics is objective data because the organization is tracking users' actual behavior within the product. It can uncover important insights that help organizations design better, more effective products.

We recommend:

Pendo

Pendo is a product experience platform that helps software product teams deliver software users love. Pendo combines product analytics with qualitative feedback to help users explore product usage patterns and user sentiment so product teams can make more informed decisions.

Mixpanel

Mixpanel is an advanced analytics platform for mobile and web. It helps businesses grow by helping them understand how their users behave and use their products by tracking actions people take rather than page views. Mixpanel's mission is to help the world learn from its data.

Amplitude

Product, marketing, and growth teams use Amplitude to discover and share insights about user engagement, retention, and revenue.

Use these apps to:

☐ Gain segmented views into users, identify drop-off or struggle points, and improve overall product experience.

Designing and Wireframing

Sometimes you can't convey your vision with words alone. Product managers often find it difficult to communicate verbally what they want a feature to look like visually. And this problem runs in both directions. A development team might have trouble explaining the technical challenges of designing a sequence of screens the way the product team has requested.

To give everyone a better ability to visualize the product, the team should use apps for visual product design, prototyping, and wireframing. What's great about these apps is that you don't need to be a natural artist to use them. The apps do a lot of the "drawing" for you.

We recommend:

Invision

The Invision app helps companies create visual representations of their entire product design workflow. Product teams can use Invision to build wireframes, element libraries, navigation flows, and even inspiration boards for their products.

Sketch

Sketch is a design platform that businesses can use to create user flows, interactive prototypes, and to take product designs from the rough idea stage to what the app calls the Developer Handoff.

Figma

Figma enables product teams to create, test, and ship designs. In addition to interface design, teams are using Figma for tasks like visual whiteboarding, diagramming and slide creation, as well as virtual design sprinting.

Mockplus

An all-in-one online design platform for any remote product team to work effectively. Mockplus connects your whole product design workflow in one place, from interactive prototyping, discussing, iterating, collaborating to design handoff.

Use these apps to:

☐ Make sure everyone is on the same page with visual depictions of the product's flow and functionality.

User Feedback

Your brainstorming sessions yielded some great product ideas. Your market research led to data suggesting that some of those ideas could be viable. But until you've put your product in the hands of users and heard their reactions, you won't know if the product has a real chance of success.

Fortunately, app makers have made it easy and affordable for software product management teams to drop customer surveys right into their products, as well as other tools to solicit direct feedback from users while they're interacting with the product. Gathering and analyzing this data can give a product management team the real-world insights it needs to improve its offering continually.

Even if you're not in the software business, you can use cloud-based customer feedback apps to communicate directly with your user base and find out what they're thinking and feeling about your products.

We recommend:

Pendo (Sentiments)

The Sentiments tool from Pendo lets companies create and deliver hyper-targeted surveys and polls within their applications.

UserVoice

UserVoice helps companies collect and analyze user feedback from within their apps and websites. The platform also lets a product team add a feedback tab—essentially a digital suggestion box—right into the app to solicit ideas and requests from users.

SurveyMonkey

What's great about a web-based survey tool like SurveyMonkey is the variety of survey formats offered, whether you want multiple-choice questions, drop-down lists, or just open comment fields, you can put together a survey in minutes. You can then send the survey out to your customers and easily track and analyze the results. For gathering quick answers to important user questions, these tools are beneficial.

Caution: Like email, online survey tools are so easy, convenient, and inexpensive that it can be tempting to overuse them. Use your surveys sparingly, so as not to upset your user base.

Use these apps to:

- ☐ Communicate directly with users and receive their feedback at the right time: while they're using your product.

- ☐ Gain insights into what real users have to say about your app, product, website, or other digital content.
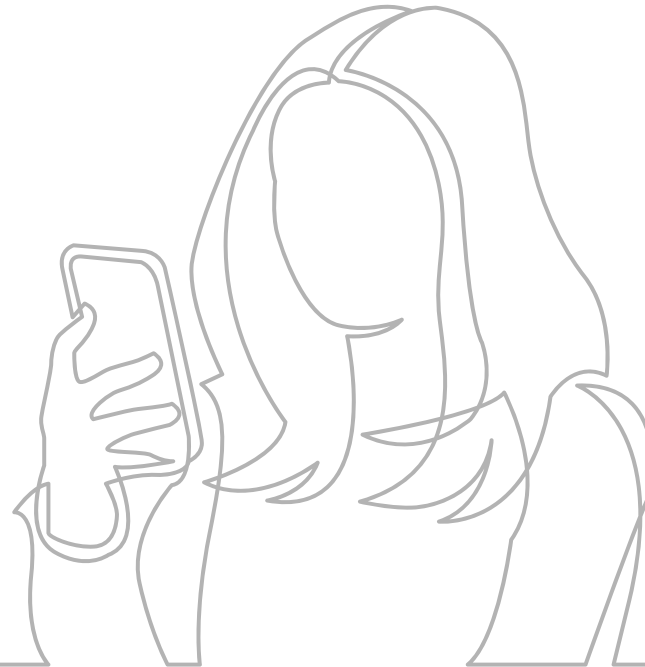
Usability Testing

While user feedback apps are among the best and most direct ways to learn what your users think, some tools can provide you even deeper and more meaningful insights about your products. They're called usability tools, or user experience tools.

These tools allow your team to monitor and collect data on how real users interact with your products. It allows your team to discover what's resonating with users, what's confusing them, and what aspects of the product they might not even realize are there because your team placed those features in non-intuitive places.

This is why usability testing apps can be even more valuable than customer feedback tools. With the feedback app, you know only what your users say. But with a usability app embedded into your product and monitoring user behavior, you can learn what your users actually do.

We recommend:

Hotjar

Product teams can use the Hotjar app to monitor the usage and usability of their apps and websites via heat maps, user-session recordings, conversion funnels, as well as several tools for receiving direct user feedback.

UserTesting

This app lets companies see, hear, and communicate directly with customers while they engage with the company's product or website.

FullStory

The design of FullStory is to help companies identify precisely where users have trouble engaging with their apps or websites.

Use these apps to:

- [ ] Gain visibility into how users are interacting with your product or site.
- [ ] Learn which areas of your app are resonating with users and which aren't.

Customer Journey Mapping

Although not all product managers use flowchart and diagram applications, the affordability and ease of use of these tools make them a great way of performing a step that many PMs overlook but shouldn't: customer journey mapping.

Creating a customer journey map helps give you and your organization a clearer view of your customer's full experience with your company. When created properly, a journey map will show all of the touchpoints an individual has with your organization from the first visit to your website (or the first call from one of your sales reps) through purchasing and using your product.

Journey maps can also focus specifically on the full experience of using your product. It'll explore everything from the first visit to the site, through completing an online form, through any contacts the user has with your sales reps or other staff, and through downloading and logging in to your tool.

We recommend:

Visio

Microsoft's Visio app is a flowcharting app used mainly for professional diagrams, org charts, and building floor plans. But product managers can use it to develop visually compelling and detailed customer journey maps. The tool has an extensive library of flowchart templates, so you won't need to start your journey map from scratch.

OmniGraffle

Here's another great app for quickly building a visually compelling customer journey map. You can use the OmniGraffle app to map out any specific aspects of a user's workflow or experience with your product.

Use these apps to:

☐ Create a visual view of each step in your customer's journey.

☐ Uncover insights in your journey map that help you strategically improve your product roadmap.

Collaborating with Engineering

Product teams must work closely with their development or engineering departments. Projects go much more smoothly and quickly when everyone understands each other and is on the same page. Thankfully, there are some tools and online resources that can enhance communication between these two key departments.

We recommend:

Github

GitHub is a code hosting service that allows developers to build software for open source and private projects in organizations. It's online platform allows users to store and share code repositories with friends, co-workers, classmates, and complete strangers.

Lynda.com

The clearer and faster that the product team can convey an idea to the development department, the sooner their product will hit the market. Product managers can use technology tutorial sites like Lynda.com to improve their ability to speak the language of engineering by getting a high-level understanding of underlying technology and familiarizing themselves with key development tools.

Use these apps to:

☐ Create the types of charts and project flows engineers are used to working with.

☐ Improve your familiarity with the terms and concepts developers use, to make sure everyone is speaking the same language.

Educational Tools
for Product Managers

- Books
- Courses
- Podcasts
- Communities

Educational Tools for Product Managers

We hope you found our walkthrough of PM tools valuable. The apps we've outlined above can add speed, accuracy, and effectiveness to your team's product efforts.

But as we pointed out in the introduction, the most important tools in your product management arsenal aren't apps or products. They're your skills, knowledge, and talents. So, we wanted to end this book with a list of some of our favorite resources to help you continue to grow as a product manager.

No matter how busy you are, or how much pressure you're feeling to get a new product out the door, it's important to periodically take time to invest time in your own success. When you find that time, we recommend these great educational tools for product managers.
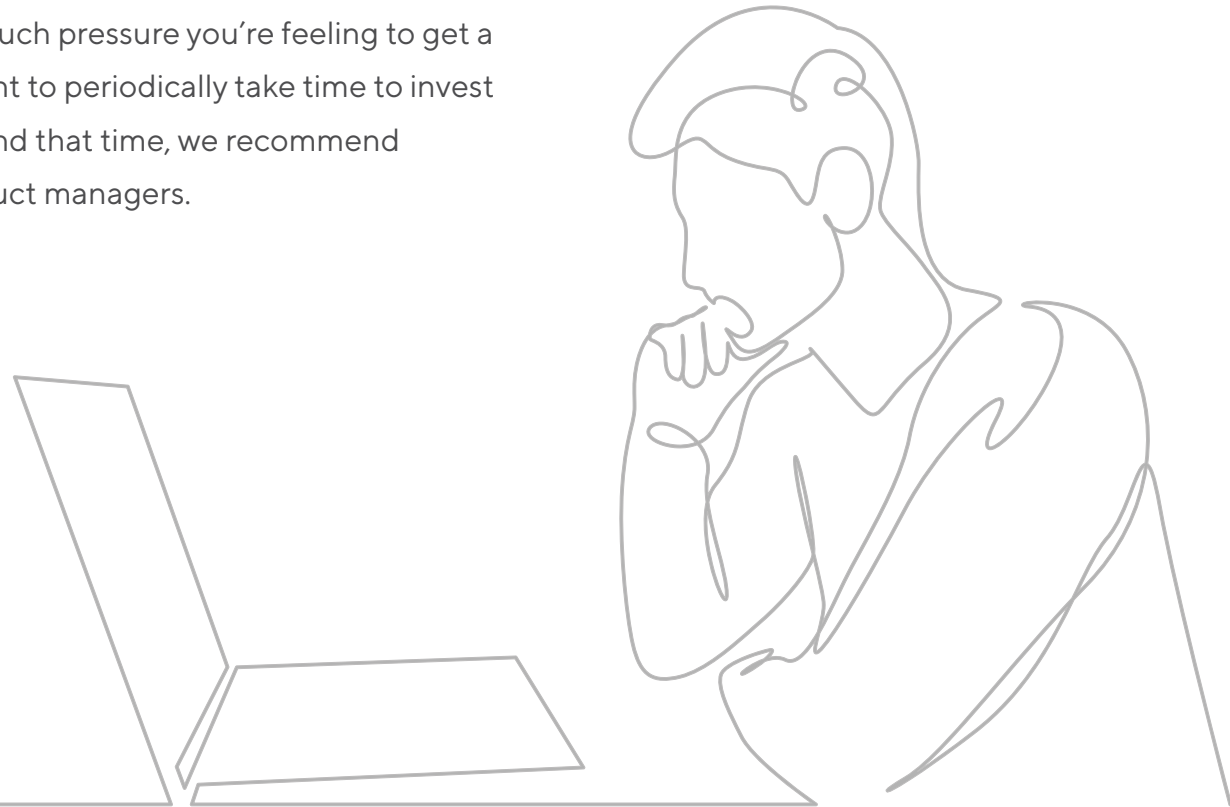
Product Management Books

Our top 10 picks:

1. Free

2. Do the Work!

3. Crossing the Chasm

4. Presentation Zen

5. Analytics at Work

6. Complete and Utter Failure

7. The Art of Product Management

8. Read this Before Our Next Meeting

9. Inspired: How to Create Products Customers Love

10. The Innovator's Dilemma

Bonus Recommendation:
ProductPlan's Career Guide for Product Managers available for free.

Product Management Communities

Our top 11 picks:

1. The Product Stack

2. Product School

3. The Product Coalition

4. Elezea

5. Creative Product Managers

6. Product Management Insider

7. Women in Product

8. Hacker Noon

9. Mind the Product

10. Products that Count

11. Product Manager Jobs

Product Management Podcasts

Our top 10 favorites:

1. This Is Product Management

2. Mixergy

3. Duct Tape Marketing

4. The Advanced Selling Podcast

5. Accelerate

6. Leadership and Loyalty Tips for Executives

7. Beyond the To-Do List

8. Product People

9. Happier with Gretchen Rubin

10. 100 PM

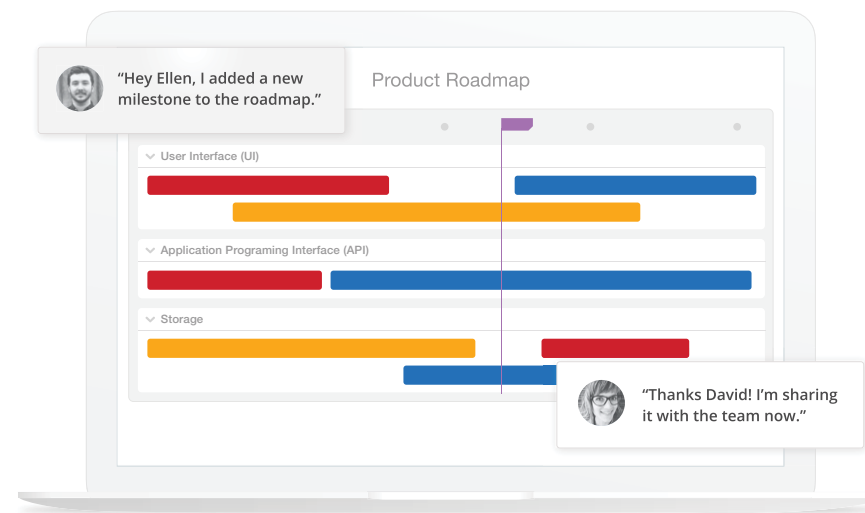**Bonus Recommendation:**

The Everyday Innovator Podcast

Product Management Courses

Our top 5 favorites:

1. Elite Product Management Coaching

2. Agile Product Management Training
    (from 280group.com)

3. Product Manager Academy
    Our top recommended course:
    "No Sweat Financial Analysis for PMs"

4. Lean Product Management (from edX.org)

5. One Week PM (from Product Manager HQ)

ProductPlan

About ProductPlan

ProductPlan makes it easy for teams of all sizes to build beautiful roadmaps. Thousands of product managers worldwide–including teams from Nike, Microsoft and Spotify–trust ProductPlan to help them visualize and share their strategies across their entire organization. With our intuitive features, product managers spend less time building roadmaps and more time shipping products.

"Hey Ellen, I added a new milestone to the roadmap."

Product Roadmap

User Interface (UI)

Application Programing Interface (API)

Storage

"Thanks David! I'm sharing it with the team now."

Get started