Blackblot® PMTK

Role Descriptions

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1. <u>Introduction</u>

   1.1.   <u>Document Objective</u>

This document outlines roles in product management that conform to the PMTK methodology, as described in the "Blackblot Product Management Team Model" and "Blackblot Product Definition Team Model". The role descriptions in this document are presented in a manner that provides easy integration with the "PMTK Job Description Template", which can be published and used for recruiting individuals for open positions in the company.

<Comment: A "Job" is a workplace labor position, which is labeled with a work title and assigned to a particular person, and represents a collection of diverse duties, tasks, and obligations. A job description is, in essence, a documented statement of the terms and conditions of an employment opportunity.

A "Role" is an occupational activity with a focused set of tasks and a clear and definitive goal, demanding a specific level of expertise to be successfully accomplished. A role description is, in essence, a documented statement of the functionality that is to be performed.

One or more roles are commonly combined to create a job, and thus the owner of a job can be assigned several roles. For example, the designation "Product Manager" is a generic job title and a loosely defined collective term used to describe a combination of roles. Accordingly, a job description is an aggregate of the prescribed employment conditions and the assigned role descriptions.

To create a job description, please see the "PMTK Job Description" template. For more information regarding the Blackblot team models and related roles, please see the "Blackblot Product Management Team" and "Blackblot Product Definition Team" book chapters which can be found in "The Product Manager's Toolkit: Methodologies, Processes and Tasks in Technology Product Management" second edition book (ISBN: 978-3-319-49997-0).>

   1.2.   <u>Types of Expertise</u>

The product management discipline consists of several roles that require specific types of expertise. The following nomenclature describes the types of expertise needed for each product management role, as defined by the PMTK methodology.

"Domain Expertise" is knowledge in the technical and business aspects of the product, industry, market, and technology. "Functional Expertise" is the ability to use tools and execute techniques, processes, and tasks that create winning products. Each "expertise type" (domain or functional) may have a specific "expertise focus" (market, industry, product, or process). For example, a person can have domain expertise in the software industry (expertise type) and be a market expert (expertise focus).

1.3. Education and Mindset

In most cases, the person assuming a product management-related role will have at a minimum an undergraduate degree level of education in a specific or related field to the product or market, or will have an equivalent number of years of work-related experience. The following nomenclature describes the educational requirements for each product management role as defined by the PMTK methodology.

- Undergraduate Degree – BS/BA degree in any subject.
- Graduate Degree – MS/MA/MBA degree in any subject.
- Technical Undergraduate Degree – BSC degree in a particular field of science such as mathematics, physics, computer science, or engineering.
- Technical Graduate Degree – MSC degree in a particular field of science such as mathematics, physics, computer science, or engineering.

It should also be noted that different roles usually favor different mindsets, with "Mindset" being a mental attitude that determines how people interpret and respond to situations.

2. Product Planner Role Description

2.1. Section Objective

This section describes the "Product Planner" role. The "Product Planner" has domain expertise in a particular market. "Product Planning" is a discipline focused on executing an ongoing process of identifying and articulating market requirements that define a product's feature set.

2.2. Role Overview

"Product Planner" is a strategic role owned by a market expert who articulates the market problem and needs. The "Product Planner" researches the market, identifies the market opportunity, and articulates user and buyer needs in the form of market requirement statements.

The primary deliverable of the "Product Planner" is the "Market Requirements Document" (MRD), which reflects a complete, accurate, and true understanding of the market and its needs. Other supporting documents that might be prepared include product use cases, product roadmaps, and pricing models.

The prime goal of the "Product Planner" role is to create satisfied product buyers and users. This satisfaction level means contentment with the product's ability to solve business or consumer problems (in a market) and meet their needs.

The "Product Planner" must be able to communicate well with both external and internal organizations. External to the company, the "Product Planner" communicates and works with customers to determine their problems and identify market requirements. Internally, the "Product Planner" communicates and works with organizational functions such as

Engineering, Product Marketing, and Sales. The "Product Planner" also acts as a communication interface between the product management team and the product definition team.

2.3. Role Skill Set

The following set of skills, listed in alphabetical order, is essential to the "Product Planner" role:

- <u>Authoring Skills</u> – Ability to articulate and document the customers' market problem in a manner that encapsulates knowledge and represents a true understanding of the market and its needs.
- <u>Interpersonal Skills</u> – Ability to build strong rapport and relationships with customers to gain an in-depth understanding of customers' problems and needs.
- <u>Interview Skills</u> – Ability to interview customers to comprehensively understand their market problem.
- <u>Language Skills</u> – Ability to communicate, in written and verbal form, with diverse audiences, internal and external to the company, in a clear and comprehendible manner.
- <u>Methodological Skills</u> – Ability to structure and craft market requirements using a formal and structured methodology.
- <u>Process Skills</u> – Ability to implement and follow the product planning process component of the product delivery process.
- <u>Research Skills</u> – Ability to perform market research, market analysis, and competitive intelligence studies.

2.4. Role Overview Table

The "Role Overview Table" provides the role's general profile and a list of its key characteristics.

Attributes/Role	"Product Planner"
Alias	Product Manager
Expertise Type	Domain expertise
Expertise Focus	Market expert
Essential Function	Identify and articulate market requirements
Professional Goal	Satisfied product buyers and users
Primary Deliverables	Market Requirements Document (MRD)
Support Deliverables	Roadmap, Pricing Model
Internal Interfaces	Engineering, Product Marketing, Sales
External Interfaces	Customers
Education	Undergraduate degree (specific or diverse subjects)
Mindset	Formalized, deterministic
Skill Set	*<Comment: See the skills listed in the "Role Skill Set" section.>*

<Comment: The "Role Overview Table" is by no means an unwavering recommendation or a precise depiction of either the role or the qualities the person assuming the role should possess, or must-have, to succeed at this role.>

3. **Product Marketer Role Description**

    3.1.   **Section Objective**
    This section describes the "Product Marketer" role. The "Product Marketer" has functional expertise in product marketing. "Product Marketing" is a discipline focused on outbound activities to generate product awareness, differentiation, and demand.

    3.2.   **Role Overview**
    "Product Marketer" is a strategic role owned by a marketing expert who analyzes product-oriented market opportunities, formulates plans that evaluate those market opportunities, and then creates plans that guide the subsequent marketing efforts.

    From a deliverables perspective, the "Product Marketer" drives the making of the product business case and, following approval, writes the market plan. Other supporting documents that might be prepared include product positioning, competitor analysis, and value documents. The "Product Marketer" also assists and guides with formulating a product launch plan, provides content and selection to marketing collateral, and provides the content to product press releases.

    The "Product Marketer" is focused on enhancing the company's competency in using marketing tools and executing techniques, processes, and tasks that aim to generate awareness, differentiation, and demand for the product.

    The prime goal of the "Product Marketer" role is to have a satisfied sales force. The market environment, as created by the actions of the "Product Marketer", leads to a very favorable situation where the market buys the product instead of the salespeople actively selling the product. Accordingly, the marketing actions initiated by the "Product Marketer" contribute to shorter sales cycles and higher sales revenue over a period of time.

    The "Product Marketer" must be able to communicate well with both external and internal organizations. External to the company, the "Product Marketer" communicates and works with various vendors that provide the company with marketing tools and services. Internally, the "Product Marketer" communicates and works with organizational functions such as Sales, MarCom, and Corporate Marketing.

    3.3.   **Role Skill Set**
    The following set of skills, listed in alphabetical order, is essential to the "Product Marketer" role:
    - Abstraction Skills – Ability to comprehend and summarize conceptual ideas and notions that apply to the different stages of the product's marketing life cycle.
    - Analytical Skills – Ability to perform a risk-adjusted, cost-benefit analysis and evaluate market opportunities.

- <u>Marketing Skills</u> – Ability to select and apply the right marketing tools to given market scenarios, and execute marketing techniques, processes, and tasks.
- <u>Planning Skills</u> – Ability to develop and implement a product marketing process that generates awareness, differentiation, and demand for the product.
- <u>Psycho-social Skills</u> – Ability to understand, factor in, and consider the market's relevant emotions, beliefs, and behaviors in selecting marketing actions.

3.4.   Role Overview Table

The "Role Overview Table" provides the role's general profile and a list of its key characteristics.

Attributes/Role	"Product Marketer"
Alias	Product Marketing Manager
Expertise Type	Functional expertise
Expertise Focus	Marketing expert
Essential Function	Evaluate market opportunities and plan/guide marketing efforts
Professional Goal	Satisfied sales force
Primary Deliverables	Business Case, Market Plan
Support Deliverables	Value Documents, Positioning Statements
Internal Interfaces	Sales, MarCom, Corporate Marketing
External Interfaces	Vendors of marketing tools and services
Education	Graduate degree (BA, but often an MBA degree)
Mindset	Conceptual, probabilistic
Skill Set	*<Comment: See the skills listed in the "Role Skill Set" section.>*

<Comment: The "Role Overview Table" is by no means an unwavering recommendation or a precise depiction of either the role or the qualities the person assuming the role should possess, or must-have, to succeed at this role.>

4.   Product Architect Role Description

4.1.   Section Objective

This section describes the "Product Architect" role. The "Product Architect" has domain expertise in a particular technology or product type, from an engineering perspective. "Product Architecturing" is a discipline focused on the formation, structure, and design of a product.

4.2.   Role Overview

"Product Architect" is a tactical role owned by a product expert who creates a high-level design for the product. The "Product Architect" understands the market opportunity, interprets market requirements, and is well-versed in technology and development processes. The "Product Architect's" main task is to devise a functional solution to the market problem according to the market requirements that are outlined in the "Market Requirements Document" (MRD).

The primary deliverable of the "Product Architect" is the "Product Requirements Document" (PRD), which is a high-level description of the functional solution, its intended use, and the set of features it provides that address the market problem and satisfies needs. Through the PRD, the "Product Architect" articulates the product's architectural vision and structure and specifies the product's components and interfaces which create the features that the market requirements prescribe. The "Product Architect" contributes to other supporting documents, including the product's feature matrix, roadmap, and technical specification documents.

The prime goal of the "Product Architect" role is to have satisfied product developers. This means that the product's design and architecture are compatible with its current internal development processes and technologies. Consequently, the product's design and architecture conform to the development team's competencies, schedule, and technical quality demands.

The "Product Architect" must be able to communicate well with both external and internal organizations. External to the company, the "Product Architect" communicates and works with contract development firms, technology partners, and customers. Internally, the "Product Architect" communicates and works with organizational functions such as Engineering, Product Marketing, and Product Planning. The "Product Architect" also acts as a communication interface between the product planning team and the engineering team.

4.3. Role Skill Set

The following set of skills, listed in alphabetical order, is essential to the "Product Architect" role:

- <u>Business Skills</u> – Ability to comprehend the business context and market problem that drive the building of a product.
- <u>Conceptualization Skills</u> – Ability to create product architecture, and evaluate and foresee the applicability of diverse architectural designs relative to the product.
- <u>Engineering Skills</u> – Ability to advocate and relate to different product development methods and modeling techniques.
- <u>Leadership Skills</u> – Ability to rally and gain backing from internal stakeholders to build organizational support for the proposed architecture.
- <u>Mentoring Skills</u> – Ability to counsel teams and individuals to wholly understand and effectively implement the proposed architecture.
- <u>Technology Skills</u> – Ability to understand in-depth, analyze, and select current and emerging technologies pertinent to the product and company.
- <u>Visionary Skills</u> – Ability to create and articulate architectural and technical visions for the product.

4.4. Role Overview Table

The "Role Overview Table" provides the role's general profile and a list of its key characteristics.

Attributes/Role	"Product Architect"
Alias	Requirements Engineer, Requirements Manager, Solution Architect, Business Analyst, Systems Analyst
Expertise Type	Domain expertise
Expertise Focus	Product expert
Essential Function	Devise a functional solution
Professional Goal	Satisfied product developers
Primary Deliverables	Product Requirements Document (PRD)
Support Deliverables	Product Feature Matrix, Roadmap (contributory role)
Internal Interfaces	Engineering, Product Marketing, Product Planning
External Interfaces	Contract development firms, technology partners, customers
Education	Technical undergraduate degree (specific or diverse subjects)
Mindset	Technical, formalized, deterministic
Skill Set	*<Comment: See the skills listed in the "Role Skill Set" section.>*

<Comment: The "Role Overview Table" is by no means an unwavering recommendation or a precise depiction of either the role or the qualities the person assuming the role should possess, or must-have, to succeed at this role.>

5. Sales Engineer Role Description

    5.1.   Section Objective

    This section describes the "Sales Engineer" role. The "Sales Engineer" has domain expertise in a particular technology or product type, from a sales perspective. "Sales Engineering" is a discipline focused on a consultative style of interaction with customers to help them realize the value and functionality of a product.

    5.2.   Role Overview

    "Sales Engineer" is a tactical role owned by an advocacy expert primarily responsible for outbound product-centric activities, such as pre-sale support and product demonstrations. The "Sales Engineer", relying on their technical skills, helps customers understand how the product delivers the necessary value and functionality that address the customers' business or consumer problem. Another objective of the "Sales Engineer" is to provide critical input or feedback to the "Product Planner" regarding customer needs and problems. All this is accomplished via frequent on-site customer visits and public engagements at conferences and conventions.

    The "Sales Engineer" understands the business context and the market problem relative to the product, is well-versed in the product's internals and feature set, and is a consummate communicator.

    From a deliverables perspective, the "Sales Engineer" drives the making of the company and product presentations, product demo scripts, and product review guides. Other supporting documents that might be prepared include win/loss analysis questionnaires and reports, and marketing collateral.

The prime goal of the "Sales Engineer" role is to ensure that customers have adequate knowledge of the value that a product holds and an understanding of its functionality.

The "Sales Engineer" must be able to communicate well with both external and internal organizations. External to the company, the "Sales Engineer" communicates and works with customers, reviewers, analysts, and journalists. Internally, the "Sales Engineer" communicates and works with organizational functions such as Engineering, Product Marketing, and Product Planning.

<Comment: Sales engineers often operate under titles such as product evangelist, technical evangelist, technical sales support, pre-sale engineer, outbound product manager, or technical product manager; yet regardless of the title, they all perform a relatively similar set of tasks.>

5.3. Role Skill Set

The following set of skills, listed in alphabetical order, is essential to the "Sales Engineer" role:

- Business Skills – Ability to comprehend the business context and market problem that drive the building of a product.
- Interpersonal Skills – Ability to build strong rapport and relationships with customers to gain an in-depth understanding of customers' problems and needs.
- Interview Skills – Ability to interview customers to comprehensively understand their market problem.
- Language Skills – Ability to communicate, in written and verbal form, with diverse audiences, internal and external to the company, in a clear and comprehendible manner.
- Technology Skills – Ability to understand the technologies incorporated in the product or used in its assembly or manufacturing.

5.4. Role Overview Table

The "Role Overview Table" provides the role's general profile and a list of its key characteristics.

Attributes/Role	"Sales Engineer"
Alias	Product Evangelist, Technical Evangelist, Technical Sales Support, Pre-Sale Engineer, Outbound Product Manager, Technical Product Manager
Expertise Type	Domain expertise
Expertise Focus	Advocacy expert
Essential Function	Outbound product-centric activities, i.e., pre-sales support and product demonstrations
Professional Goal	Customer knowledge of product value and functionality
Primary Deliverables	Company and product presentations, product demo scripts, product review guides
Support Deliverables	Win/loss analysis questionnaires/reports, marketing collateral
Internal Interfaces	Engineering, Product Marketing, Product Planning
External Interfaces	Customers, reviewers, analysts, journalists
Education	Technical undergraduate degree (specific or diverse subjects)

Attributes/Role	"Sales Engineer"
Mindset	Technical, formalized, deterministic
Skill Set	*<Comment: See the skills listed in the "Role Skill Set" section.>*

<Comment: The "Role Overview Table" is by no means an unwavering recommendation or a precise depiction of either the role or the qualities the person assuming the role should possess, or must-have, to succeed at this role.>

6. **MarCom Manager Role Description**

   6.1. **Section Objective**

   This section describes the "MarCom Manager" role. The "MarCom Manager" has functional expertise in the discipline of marketing communications. "Marketing Communications" (MarCom) is a discipline that is focused on the application of a mix of media vehicles that support marketing objectives.

   6.2. **Role Overview**

   "MarCom Manager" is a tactical role owned by a media expert primarily responsible for creating interest and memorable presence through the conception and copywriting of all collateral material, advertising, direct response mail, web, and other types of communications media.

   The "MarCom Manager", relying on language, creative, and artistic skills, is primarily engaged in the art direction of the company's collateral documents and media deliverables. Other responsibilities include media placement and scheduling, campaign management and measurement, budgeting and budget tracking, and advertising management (conception, pricing, media placement, and scheduling).

   The prime goal of the "MarCom Manager" role is to ensure a consistent image and positioning in the target market, according to messages and directives provided by the "Product Marketer".

   The "MarCom Manager" must be able to communicate well with both external and internal organizations. External to the company, the "MarCom Manager" communicates and works with advertisement agencies, creative/design bureaus, and production houses. Internally, the "MarCom Manager" communicates and works with organizational functions such as Sales, Product Marketing, and Corporate Marketing.

   6.3. **Role Skill Set**

   The following set of skills, listed in alphabetical order, is essential to the "MarCom Manager" role:

   - <u>Budgeting Skills</u> – Ability to prepare and track a spending plan that will be used to fund the planned media activities.
   - <u>Creative Skills</u> – Ability to devise new forms of creative expression through symbols, ideas, and notions, in an original, novel, or unconventional way.

- <u>Cultural Skills</u> – Ability to perceive and realize how to adapt and create content compatible with the target market's local customs, nuances, norms, and behaviors.
- <u>Language Skills</u> – Ability to communicate, in both written and verbal form, with diverse audiences, internal and external to the company, in a clear and comprehendible manner.
- <u>Negotiation Skills</u> – Ability to perform a leadership role in the process of searching for an agreement that satisfies all parties which have competing interests.
- <u>Project Management Skills</u> – Ability to perform the overall planning and coordination of tasks, scheduling, and resource assignments to produce a deliverable.

6.4. Role Overview Table

The "Role Overview Table" provides the role's general profile and a list of its key characteristics.

Attributes/Role	"MarCom Manager"
Alias	Market Communications Manager
Expertise Type	Functional expertise
Expertise Focus	Media expert
Essential Function	Conception and copywriting of all collateral material
Professional Goal	Consistent image and positioning in the target market
Primary Deliverables	Art direction of collateral and media deliverables
Support Deliverables	Media placement and scheduling, campaign management and measurement, budgeting, budget tracking, advertising management
Internal Interfaces	Sales, Product Marketing, Corporate Marketing
External Interfaces	Advertisement agencies, creative/design bureaus, production houses
Education	Undergraduate degree (specific or diverse subjects)
Mindset	Artistic, imaginative, creative
Skill Set	*<Comment: See the skills listed in the "Role Skill Set" section.>*

<Comment: The "Role Overview Table" is by no means an unwavering recommendation or a precise depiction of either the role or the qualities the person assuming the role should possess, or must-have, to succeed at this role.>

7. Director of Products Role Description

7.1. Section Objective

This section describes the "Director of Products" role. The "Director of Products" has solid functional expertise in the product planning and product marketing disciplines, acute strategy formulation expertise, and a complete understanding of product management tools and processes.

7.2. Role Overview

"Director of Products" is a highly strategic and encompassing role owned by a strategy and process expert who leads the product management team by

providing overall product vision, product and market strategies, and team leadership.

The "Director of Products" is responsible for balancing corporate goals with long-term market trends and opportunities, and for directing, establishing, maintaining, and planning the overall policies and strategies for the product management department.

On the strategic level, this role formulates the company's product and market strategies and drives their implementation, while balancing corporate goals with long-term market trends and market opportunities.

This leadership position provides coaching and mentorship to the product management team members on the tactical level. It is responsible for furnishing them with resources, tools, and uniform processes to do their respective jobs. The "Director of Products" role creates and manages the overall product management process and oversees its effective execution.

From a deliverables perspective, the "Director of Products" directs, supports, and contributes primarily to making the product business case, market plan, and market requirements document (MRD). The "Director of Products" also guides and assists with formulating a product launch plan and the value documents.

The prime goal of the "Director of Products" role is to continuously oversee the successful formulation and execution of the product and market strategies and to achieve better consistency in the internal application of the product management discipline.

The "Director of Products" must be able to communicate well with both external and internal organizations. External to the company, the "Director of Products" communicates and works with customers and partners. Internally, the "Director of Products" communicates and works with organizational functions such as Sales, MarCom, Corporate Marketing, and Engineering.

7.3. Role Skill Set
The following set of skills, listed in alphabetical order, is essential to the "Director of Products" role:
- Analytical Skills – Ability to engage in creative problem solving and draw conclusions that orient towards correction and improvement.
- Business Skills – Ability to comprehend the business context and market opportunity that drives the building of a product.
- Decision Making Skills – Ability to make sound decisions by exercising analysis and resoluteness.
- Interpersonal Skills – Ability to build strong rapport and relationships with internal and external organizations.
- Leadership Skills – Ability to exercise guidance and influence within the product management team and the company to forge commitment and consensus.

- <u>Mentoring Skills</u> – Ability to counsel, assist, and share knowledge and experience with teams and individuals to facilitate improved job performance.
- <u>Process Skills</u> – Ability to develop and implement a structured product management process that promotes a more effective execution of product management procedures and operations.

7.4. <u>Role Overview Table</u>

The "Role Overview Table" provides the role's general profile and a list of its key characteristics.

Attributes/Role	"Director of Products"
Alias	Director of Product Management
Expertise Type	Functional and domain expertise
Expertise Focus	Strategy and process expert
Essential Function	Lead the product management team by providing overall product vision, product and market strategies, and team management
Professional Goal	• Continuously guide the successful formulation and execution of the product and market strategies • Achieve better consistency in the internal application of the product management discipline
Primary Deliverables	Business Case, Market Plan, Market Requirements Document
Support Deliverables	Product Launch Plan, Value Documents
Internal Interfaces	Sales, MarCom, Corporate Marketing, Engineering
External Interfaces	Customers, Partners
Education	Graduate degree (BA, but very often an MBA degree)
Mindset	Conceptual, formalized, creative
Skill Set	*<Comment: See the skills listed in the "Role Skill Set" section.>*

<Comment: The "Role Overview Table" is by no means an unwavering recommendation or a precise depiction of either the role or the qualities the person assuming the role should possess, or must-have, to succeed at this role.>