

18) Relationship with Marketing & Sales (“M&S”)

General remarks

The Marketing & Sales (“M&S”) department (sometimes two separate departments) of a company takes care of **promoting and selling products**. M&S is therefore a **major stakeholder** in any project whose outcome is a “commercial” product or even a free-of-charge website (since such a site contributes to the company’s image, of which Marketing is usually the guarantor).

As the **primary interface** between the project team and M&S, **the PM** should ensure that M&S is involved at appropriate stages of projects of the kind mentioned above.

The **success of a project** is tied to the success of the resulting product, which generally requires **close and efficient cooperation between the PM and M&S**.

The PM may deal with several people in M&S, in particular with his counterpart, the **“product manager”**, with whom the PM should entertain a privileged relationship.

Some projects may actually be owned and/or sponsored by M&S, for example an online store or a corporate website. In that case, M&S may appoint a PM within its organization to deal with the PM in charge of project execution, to whom in some cases M&S may delegate the role of “overall PM”.

Involvement of M&S in the preliminary and preparation phases of a project

The idea leading to a project may originate within M&S or it may come from another source.

However that may be, M&S is usually involved in the **advisability study**, and is instrumental in helping the PM develop the **business case** for the project. Indeed, a product’s business model, pricing assumptions, sales projections, the budget required for promotion, etc. are usually not determined by the PM but provided by M&S.

M&S should also be involved in the **requirements specification process**, given its knowledge (in theory...) of the market, of competitors’ products and of user needs.

In particular, it is up to M&S to determine a product’s **business model**, to specify how the product will be **distributed** and, in the case of fee-based websites or online sales, what **payment methods/system** will be used.

M&S should define the various **versions of the product** needed to implement its marketing and sales strategy, for example multiple versions of a CD/DVD-ROM (“standard”, “deluxe”, demonstration versions...) or parts of a website (part free of charge, part subject to a fee).

M&S is also often responsible for providing a **graphic theme** or at least guidelines for the graphical user interface of a product.

Finally, the **deadline for the product launch** is often set by M&S (which sometimes leads to a negotiation between the PM and M&S during the project planning phase...).

In some situations, M&S may actually provide the PM with a preliminary requirements specification, which may be a simple and high-level **expression of needs**.

For the first version of the EHM, the Marketing department at Hachette had prepared a document that outlined the major features of the desired product, as a result of an in-depth analysis of the market and competition. The document was detailed enough to serve as a foundation for the feasibility study.

It is the PM's responsibility to transform requirements expressed by M&S into a detailed specification. This may involve several rounds of discussion between the PM and M&S. Once the requirements specification has been finalized, it should be officially approved by M&S (preferably in writing...).

Brainstorming sessions involving M&S representatives may be useful in the process of establishing requirements. The number of participants should be limited, for example to a dozen or so, otherwise the meeting may be difficult to manage and may be less fruitful than expected. Participants should be encouraged to express themselves freely and to voice any ideas they may think of, even the boldest and craziest.

The PM will then need to sort the contributions, make sense out of them and transform them into **realistic and workable propositions**, to be reviewed and approved by those who participated in the brainstorming effort.

In preparation for the first redesign and redevelopment of the EHM (for its third edition, to be dated "2000"), I had devised and written an extremely detailed questionnaire, which I asked twenty or so people, including many M&S representatives, to study with great care and to fill in. The questionnaire allowed respondents to criticize the previous two versions of the EHM in terms of its editorial, functional, user-interface and technical characteristics. It also allowed them to give their feedback on a number of proposals relating to new features. The consolidated results of the survey were used as input to the requirements specification for v3 of the EHM.

In preparation for the second redesign and redevelopment of the EHM (for its eighth edition, to be dated "2005"), I organized a series of brainstorming meetings with M&S people, selected members of the project team and representatives of the software development contractor. Involving developers was extremely beneficial since they were able to give immediate feedback concerning the feasibility of features suggested by other participants, in particular M&S people.

Involvement of M&S in the execution phase of a project

As a major stakeholder in a project, M&S naturally has a **right of inspection** as regards its execution. Appropriate M&S representatives should therefore be invited to important meetings, in particular those at which the PM reports progress to his management, as well as those concerning key project milestones.

The **product** being created should be **shown to M&S** at various stages of its development.

The PM may be tempted to not show alpha versions to M&S because they are naturally far from complete and may not perform properly. However, since **feedback at an early stage of product development is very useful**, the PM should not hesitate to show alpha versions. In order to reassure M&S as to the quality of future versions of the product, the PM should complement the demonstrations with an appropriate commentary and justification of the current "work in progress" state of the product.

The **user interface** of a product should be submitted to M&S for review before it is "frozen". In particular, if the guidelines for the graphical interface have been provided by M&S, compliance of the interface with such guidelines must be checked by M&S.

In case of doubt or conflicting opinions concerning user-interface elements (for example the colour of a banner or the look of an icon), M&S should in principle have the last word.

When the product is in its beta stage, it is usually the right time to present it to the **sales force**.

It is sometimes useful, even necessary, to deliver **product training** to selected M&S people who are likely to give **demonstrations** of the product. The PM should provide a **demonstration scenario**, a **summary description of the product** highlighting key selling points and benefits for the users, and a **"Questions & Answers (Q&A)"** document.

When the PM believes it is the appropriate time, he should have M&S volunteers participate in "free testing" of the product. Indeed, people with a "fresh eye" often discover bugs that testers within the project team may have overlooked.

Finally, M&S needs **information from the PM in order to prepare the launch of the product**. The PM must make sure that such information is communicated to M&S in a timely fashion, as scheduled in the Communications section of the project plan.

Customer Services

The Customer Services function (aka "Support", "Assistance", "Hotline"...) is often part of the M&S department in a company's organization. However that may be, it is essential that the persons who will be in charge of **supporting the new product** resulting from a project should be given **information** and possibly **training** on the product before it is released to customers.

"Hotliners" will also require **documentation** and a **"Q&A"** on the product, as well as **the product itself**, so that they can familiarize themselves with it before it is released. It is the PM's responsibility to make sure that Customer Services are provided with everything they need to do a good job.

It is very useful to have **hotliners** perform functional, technical and "free" **testing** of the beta version of a product. Indeed, hotliners have an excellent knowledge of how end users behave with products (for example, they are able to simulate "eccentric" usage of a product, which is liable to reveal bugs in unexpected places...). Hotliners are also familiar with product pitfalls in general, and they are usually prompt to identify any product defects.

Customer Services are also a **valuable source of information** after a product has been released, since they can relay **feedback from users** to the PM. Such information must be taken into account by the PM for new versions of the product.

It is advisable for a PM to spend time with hotliners on a regular basis, in order to become aware "in live mode" of problems encountered by users.

Cooperation between the PM and Customer Services is an essential factor in ensuring the quality of products under the PM's responsibility.

At Apple France, back in the years 1983-1984, the CEO required that each member of the Products team, which I was part of, should spend a whole day every month at the hotline, not as a simple observer but as an actual hotliner in direct contact with retailers and end users, which made the experience really useful and rewarding.

At Hachette, as Director of a Products division and PM for a number of projects, I systematically involved my Customer Services colleagues in the product testing process. I also spent time on a regular basis with the hotliners, listening to and sometimes participating in conversations with end users. And I carefully analyzed and acted upon the monthly reports issued by Customer Services. The close relationship I established with Customer Services was an essential factor in ensuring a high standard of quality for "my" products.

Product packaging

Some products need to be packaged for distribution to customers. For example, the packaging of a CD/DVD-ROM may include a plastic case or paper sleeve for the disk, a manual and a cardboard box.

M&S is generally responsible for **designing and creating** the various packaging elements. However, **text and illustrations** describing a product on its packaging are **usually provided by the PM**. If the PM is not asked for such elements, he should at least request to review the text and illustrations, in order to **make sure that product information is correct**.

The content of a product's **manual** is usually provided by the PM (or by another member of the project team), while M&S takes care of the page layout and printing.

In principle, **M&S should submit all packaging elements to the PM** for review and validation before passing them for press.

The same principle should apply to **press releases** and any other **communication material** (eg brochures, leaflets, adverts) concerning the product.

Websites

M&S may be responsible for certain elements of a website's content. Such elements may be delivered by M&S to the developer directly or through the PM. If there is a back office for the website (which is generally desirable), initial and updated content may be uploaded and published without any intervention on the part of the developer.

As guarantor of the overall quality of "his" product, **the PM should review all elements provided by M&S** and make sure that there are no semantic or syntactic mistakes.

Here is a non-exhaustive list of website content elements usually provided by M&S:

- logos and other graphic elements relating to the company's identity,
- home-page text and illustrations,
- company description and contacts,
- copyright and other legal information,
- privacy notice/policy,
- product prices,
- sales terms & conditions,
- text appearing on pages dealing with ordering and payment,
- holding pages for a provisional site.

Involvement of the PM in product promotion activities

M&S is in charge of product promotion and sales, but it usually needs **help from the PM** for some of its actions and events, given the PM's in-depth knowledge of the product. The PM (or another member of the project team designated by the PM) should therefore be prepared to take part in the following M&S activities (non-exhaustive list):

- communications/advertising agency briefings,
- press conferences,
- interviews (press, radio, TV, web),
- presentations to salespeople and commercial partners (eg resellers),
- presentations to prospects and customers,
- product demonstrations at exhibitions, etc.