



Example Project Roadmap: "Nexus" CRM Platform Launch

Project Vision: To launch an intuitive and affordable Customer Relationship Management (CRM) platform for small businesses, enabling them to manage customer relationships and accelerate sales growth.

Key Business Goals:

- Achieve 1,000 paying customers within the first 6 months post-launch.
- Establish a foothold in the small business CRM market.
- Create a platform for future feature expansion.



NEXUS CRM PRODUCT ROADMAP

Timeline	Q1 Foundation & Beta Launch	Q2 Public Launch & Sales Tools	Q3 Data & Reporting	Q4 Expansion & Integration	SUCCESS METRICS (KPIs)
Status	● On Track	● On Track	● At Risk	○ Not Started	100+ Active Beta Users Positive Feedback on Cora Usability 500+ Paving Customers
Strategic Themes	Build the Core Platform (MVP) Establish a stable, usable foundation for all future work	Empower Sales Teams Provide tools that directly help users sell more	Unlock Business Insights Allow users to make data driven decisions.	Extend the Platform's Reach Meet users where they work and connect to other tools	
Key Features & Deliverables	Contact & Company Management	Visual Sales Pipeline	Core Sales Dashboard	iOS & Android Companion Apps	500+ Trial-to-Conversion Rate
Major Milestones	Basic Deal Tracking	Roll v.1.0 Launch	Lead Source Reporting	Zapier Integration	Mobile Apps v.0 Launch
Success Metrics (KPIs)	Internal Alpha Complete Invite-Only Beta Launch	Billing System Live Public v1.0 Launch	Reporting Module Launch	1,000+ App Downloads 10+ Public Zapier Templates	10+ Public Zapier Templates Created

Legend: ● On Track ● At Risk | ○ Off Track | ○ Not Started

How to Use This Example in Your Bootcamp: A Guide for Instructors

Use this example to highlight the key concepts from the study sheet. Ask your students these questions to facilitate discussion:

1. **Is this a Project Plan or a Roadmap? Why?**
 - **Answer:** It's a roadmap. It lacks detailed tasks, resource assignments, and specific dates (e.g., June 5th). It focuses on high-level themes, deliverables, and quarters.
2. **How does this roadmap connect to the "Focus on Value" principle (PMBOK® 7)?**

- **Answer:** Each theme is tied to a user benefit (e.g., "Empower Sales Teams," "Unlock Business Insights"). The success metrics (KPIs) are designed to measure the *value* delivered, not just the completion of work.
3. **Imagine you are presenting this to the project sponsor. What is the key message of Q3?**
- **Answer:** The key message is strategic: "In Q3, our focus is to move beyond just being a data-storage tool and provide real intelligence to our users through dashboards and reporting. This will make our product 'stickier' and more valuable."
4. **The status for Q3 is "At Risk (Dev Resources)." As the project manager, what does this roadmap empower you to do?**
- **Answer:** This is a classic PMP exam scenario! The roadmap is a communication tool to address this problem *proactively*. It allows you to go to leadership and say, "To deliver the critical 'Data & Reporting' theme as planned in Q3, we have a resource risk. We need to discuss options now to ensure we can deliver this value." It frames the conversation around strategic goals, not just a staffing shortage.
5. **How could you tailor this for a more Predictive environment?**
- **Answer:** The themes might be replaced with formal project phases (e.g., "Phase 1: Core System," "Phase 2: Advanced Modules"). The milestones would be more rigid, representing phase-gate approvals. The timeline would be presented with more confidence, though still at a high level.
6. **Where does this fit in the Agile planning onion?**
- **Answer:** This sits right between the high-level **Vision** ("Become the best CRM for small businesses") and the more detailed **Release Plan** (which would break down Q1 into specific releases with a backlog of features).
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