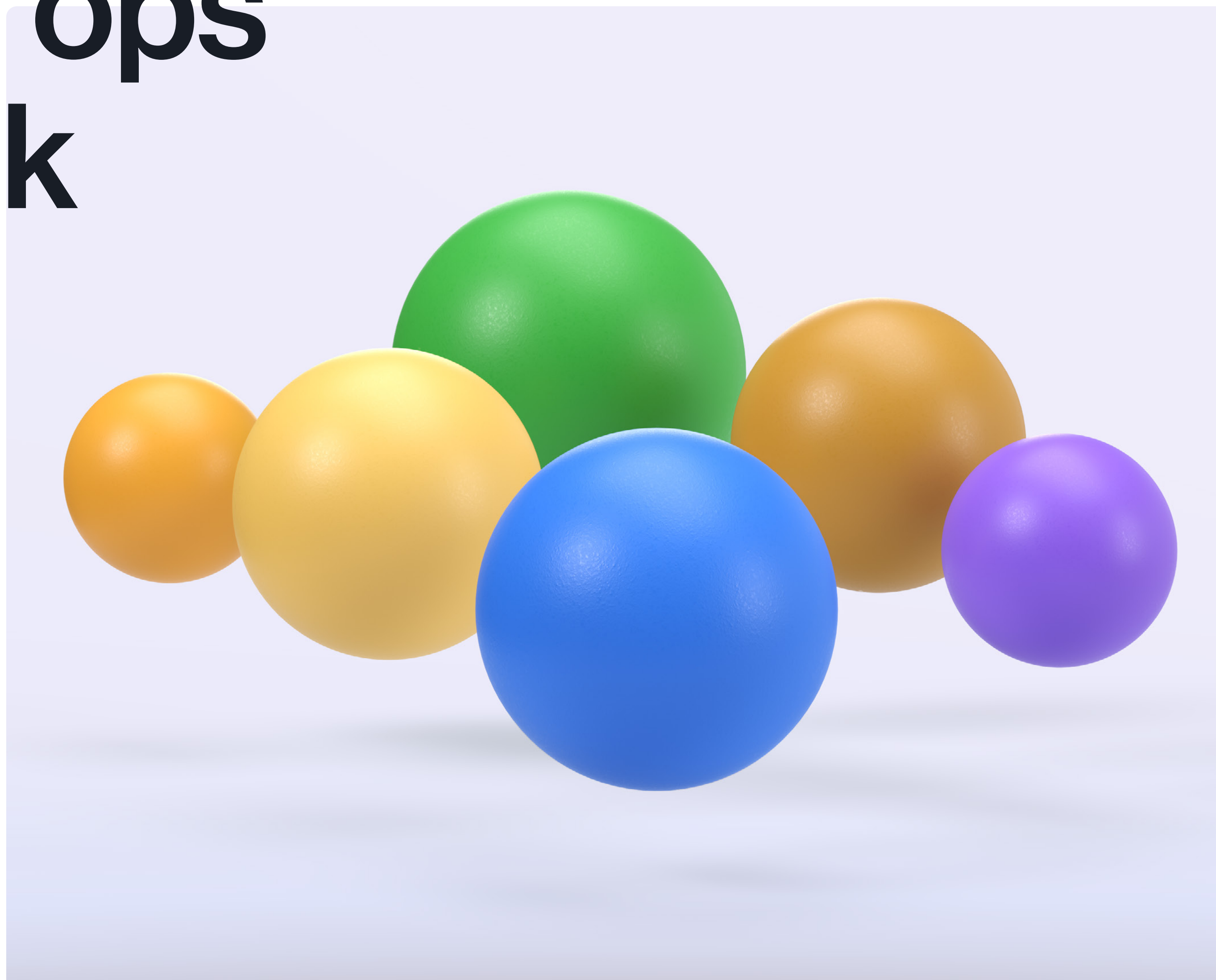
Airtable product ops playbook

Taking your product from concept to launch



Airtable

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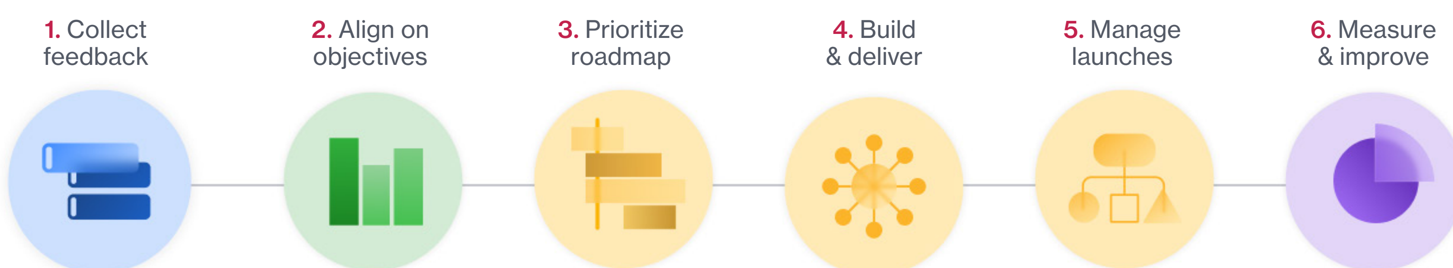
Introduction

Every year, tens of thousands of new products are introduced to the market—and many of them miss the mark. Three big reasons products fail to live up to expectations? Inaccessible customer insights, misaligned strategy, and inability to measure impact.

And that's exactly where Airtable can help.

From centralizing product feedback to measuring and evaluating results, there are a slew of operational subprocesses, tasks, and actions that make up the product development lifecycle. The success of a product depends on whether the teams responsible for that work are aligned. As shown in the graphic below, the product development lifecycle can be broken into **six distinct stages**:



Product teams use Airtable to stay aligned from concept through market release, and to keep their customers front and center at every stage of the product development lifecycle. When you have a single source of truth in Airtable, you can keep all functions aligned and working as one team—so you can turn insights into user-centric products that customers love.

In this playbook, we'll explore ways you can use Airtable to streamline and unify operations for each stage of the product development lifecycle. It captures how some of the world's most innovative product teams are using Airtable. Of course, these aren't the only ways to leverage Airtable. **Fully flexible and effortlessly customizable, Airtable is built to adapt to your unique workflows and business requirements—not the other way around.**

This playbook will share best practices and tactics for optimizing the product development lifecycle with Airtable. If you want to dive deeper into the technical aspects for using Airtable during any specific stage, just click through to the in-depth guide at the end of any stage summary.

Before you begin

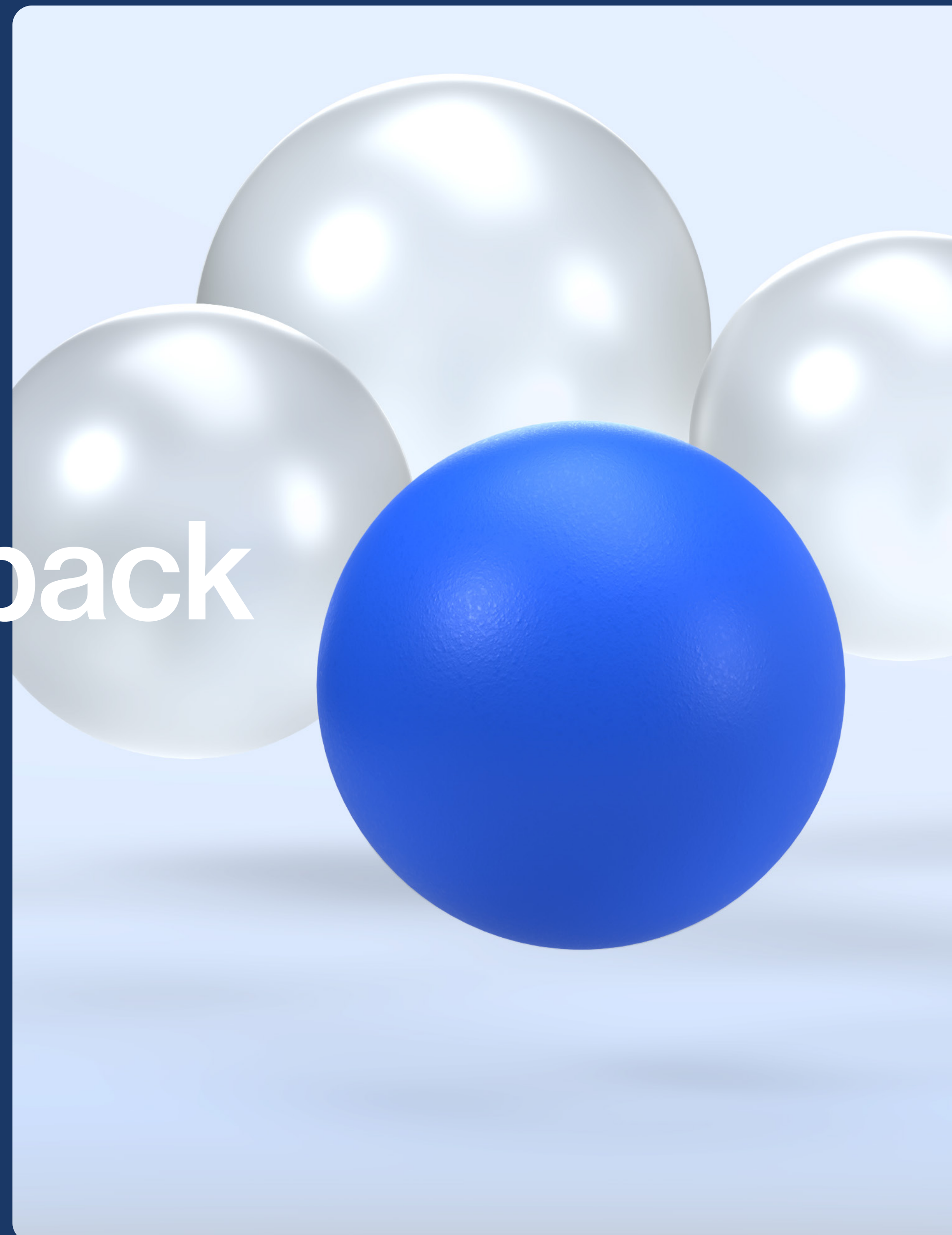
To get the most out of this playbook, we highly recommend having a basic understanding of important Airtable terms and concepts. You can get a quick crash course here.

Learning any new technology usually makes so much more sense when you can see it in action. So if you're a visual learner, we suggest you follow along on the sample product ops bases we've created! You can explore the sample bases we've created, and guidance on how to use them in this walkthrough.

Now, let's get rolling.

Stage 1:

Centralizing and analyzing product feedback



It takes months (or years) of hard work to get a product into the hands of eager customers. But for that work to be productive, you have to know what customers want in the first place by collecting product feedback.

Product feedback comes from many different places: user research, Customer Advisory Boards (CABs), ticketing systems like Zendesk, CRMs like Salesforce, and the list goes on. Airtable makes it easy for product teams to centralize product feedback in one place. **You'll spend less time searching for information, and guessing which features to prioritize—and more time building and shipping products your customers will love.**

Here's how to build a comprehensive product feedback process in Airtable:

Start tracking customer feedback

1. Create a centralized repository of feedback for your product development team. You can do this by creating a "Feedback" table within your team's Airtable base.

2. Identify the information you need to track so that you can determine the fields—from customer contact information to the feedback itself—that you'll want to add to your base.

Learn more

Centralize feedback across sources and teams

3. Gather and input feedback into your hub by directly importing existing feedback with just a few clicks, or utilizing Airtable forms to collect internal and external feedback on an ongoing basis.

4. Use pre-built integrations to connect customer insights across third-party tools, like Zendesk, Salesforce, and Typeform. Or build your own custom integration.

5. Link customer feedback to specific product initiatives and owners, so you know what feedback you're already actioning on, and what might be new.

Learn more

Analyze and take action on feedback

6. Surface customer feedback trends with reporting apps that can be installed from the Airtable Marketplace. Use them to uncover valuable insights, like the number of times a customer has requested a particular feature, or feedback themes by ARR.

7. If you have a lot of feedback to parse, prioritize it using Airtable's custom interfaces that allow your team to quickly tag, categorize, and score individual feedback.

8. Automate manual tasks—like alerting Engineering via Slack when a high-profile customer reports a bug—to accelerate feedback triage.

Learn more

Centralizing your external and internal feedback with Airtable creates a solid foundation so teams can stay focused on the needs of the customer. And when your organization scales, Airtable can grow with you—integrations let you connect your third-party tools so all of your feedback can live in one place.

Want to dive deeper into these steps for centralizing product feedback in Airtable?

Check out the detailed walkthrough for this stage.

Read more

Stage 2:

Setting and aligning on product objectives

Product ops is an all-hands-on-deck discipline, requiring input from product managers, designers, and more. And when each team has in its own projects and goals, it's easy to lose sight of company strategy.

By setting clear objectives, you can keep every team working toward the same strategic goals. With Airtable, you can organize and distribute your objectives—whether you use the OKR framework or another objective-setting structure.

You can build an objective tracking system, link objectives to specific initiatives, and organize information in a way that makes sense to different stakeholders—all in one place.

Here's how to get started with product objective planning in Airtable:

Start planning product objectives

1. Define your objectives and the criteria you'll use to track them. Creating an "OKRs" table in your Airtable base can help each team track performance against key results specific to their product area.

2. Identify the specific projects (or features) that will help your team achieve those objectives. Link projects to their corresponding objectives to track your progress.

Learn more

Manage product objectives across multiple teams

3. Centralize objectives for maximum visibility while still allowing teams to design their own unique workflows around those OKRs. To organize your objectives in Airtable, consider a tops-down model where objectives are managed centrally by product ops, and then used to shape plans for individual product teams.

Learn more

Report on progress toward product objectives

4. Once objectives are defined and locked, use your base to share regular progress updates against them. Automate OKR status updates to stakeholders, visualize OKR progress over time with reporting apps, or create custom, interactive insights dashboards.

Learn more

By setting your objectives in Airtable, you can develop a single source of truth to let your organization cross the finish line before you know it—together.

Want to dive deeper into these steps for centralizing product feedback in Airtable?

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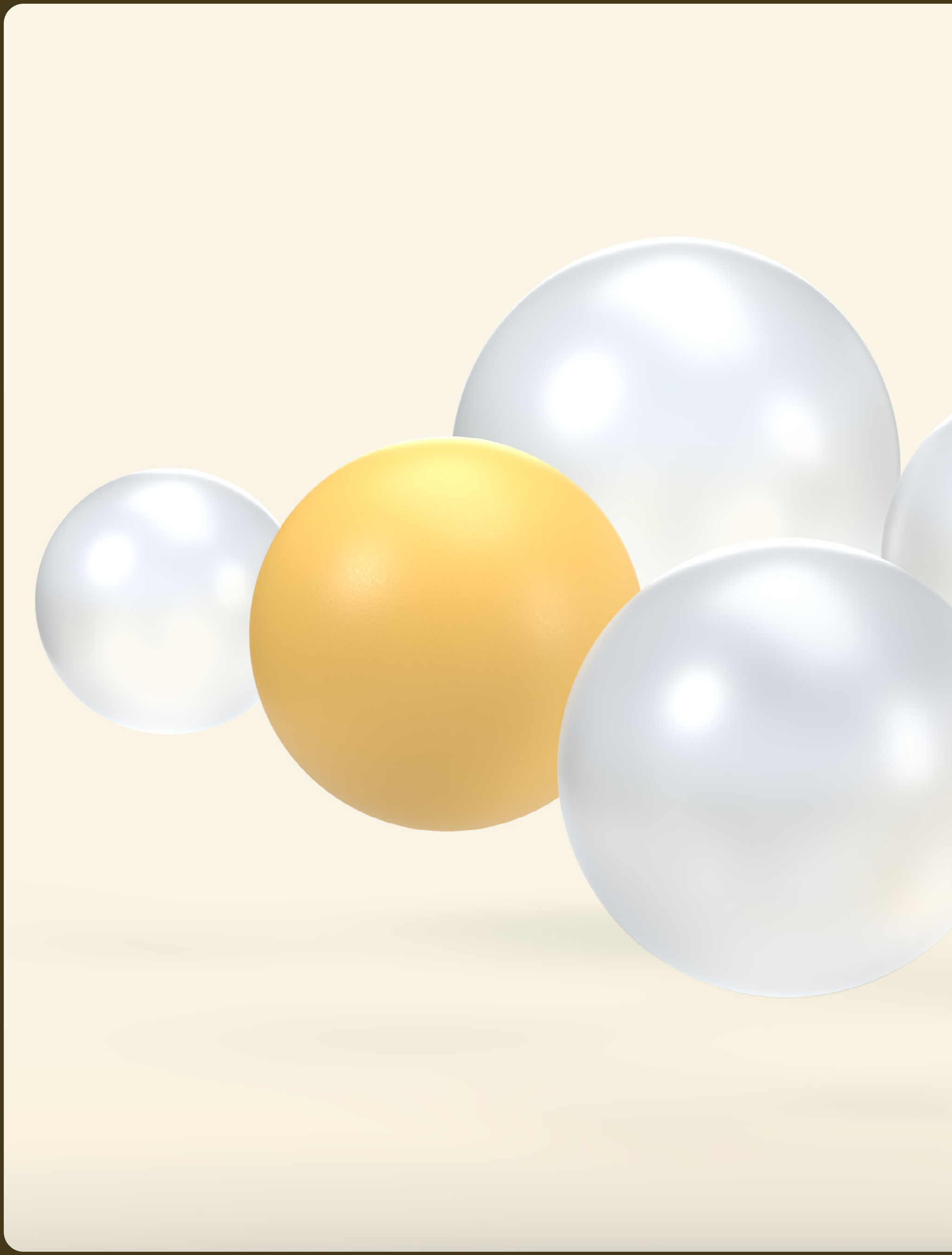
Read more

Stage 3:

Prioritizing product roadmaps

After capturing feedback and setting objectives, the time has come for product ops teams to act. We're talking about identifying priorities, divvying up assignments, and connecting your team to the company's strategy. To get it all done, you need a strong product roadmap.

Manage every aspect of your roadmap in Airtable, from linking initiatives to OKRs, to assigning work directly to engineers—and then monitor progress and insights holistically in the same place.



Get started building your roadmap in Airtable with these steps:

Start prioritizing your roadmap

1. Define what a "project" means for your team, and what details are critical to capture. Creating a "Projects" table in your Airtable base can help you prioritize planned features, as well as visualize calendars of key dates.

2. Prioritize future work by "scoring" it. Whether you use the MoSCoW Method, Kano Model, or some other prioritization framework, Airtable can help you calculate a priority score for each project based on the details you provide.

3. Associate roadmap items with other key information in Airtable to unlock deeper insights. For example, link projects to the key results they'll drive, or to the customer feedback they're addressing.

Learn more

Bring your team into your roadmap

4. Make your roadmap easily accessible to key stakeholders by creating custom views that help everyone visualize the roadmap in a way that's most useful to them.

5. Flexibility is vital in product ops—so it's important to be able to change dates and details as the need arises. Use Airtable's custom views and reporting apps to understand each team member's availability and visualize how your team's work is unfolding over time.

6. Connect your work with your engineering team's tool stack. Integrate Airtable with JIRA, for example, to associate Jira tasks with each feature or project.

Learn more

Build an organization-wide roadmap

7. Align your entire organization around one source of truth by centralizing roadmap information across teams. This keeps information structured for global reporting, while enabling team-level autonomy for day-to-day project workflows.

8. Give teams an easy way to get their ideas on the roadmap. Create a form in Airtable that stakeholders can use to suggest new projects for consideration.

9. Prioritize features based on customer and revenue impact. Syncing information from Salesforce into Airtable and associating it with planned features or customer feedback, for example, can help you quickly understand the potential revenue impact.

Learn more

With this foundation in place, you can easily scale up and get your entire organization aligned around a universal product roadmap.

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Read more

Stage 4:

Tracking ongoing product delivery

So, you've done the hard work of collecting feedback, setting objectives, and crafting a detailed roadmap? Now, it's time to do the thing—build and launch your product.

Your team can store and update all of your tasks in one database: Airtable. By keeping everyone on the same page, you can concentrate on what matters most—shipping great products out to customers.

Here are some best practices for using Airtable to build your project plans, allocate resources, manage delivery, and share updates:

Get started with sprints and delivery management

1. To manage sprints and ongoing delivery, first define the information you need to collect for each project, like project name, projected ship date, and project stakeholders.

2. Context is key—especially when you start sending out assignments (and deadlines) for an upcoming launch. Use Airtable to relay additional project information and requirements that might live in different documents.

Learn more

Manage resource allocation, sprints, and ongoing delivery

3. Visualize every task across your team to understand resource allocation for sprint planning purposes. Use Airtable's different view types to visualize tasks in a number of ways: by sprint, project, status, and more.

4. Use automations to streamline custom workflows and manage product delivery between stages. Automating review and approval reminders, for example, can help keep work on track.

5. Collect and curate information on sprint status, as well as current sprint commitments and updates. Create a custom interface in Airtable to curate smaller subsets of information for stakeholders and solicit updates from task owners.

Learn more

Keep your whole organization informed and on track

6. To drive reviews in the product delivery process, dedicate a table to check-ins, or any key product delivery milestones you use.

7. Information overload can slow things down. Speed up the process by creating relevant, custom interfaces for each product feature, or each team member's projects.

8. Cut down manual tasks by using automations in the review process. For example, create an automation that sends a Slack message to alert designers when an asset's status has been marked as "needs approval" in Airtable.

9. Share automated progress updates with team leads, stakeholders, and leadership about project updates.

Learn more

By standardizing the processes around your launch, product teams can focus on building and shipping high-quality products that customers will love. And by implementing these best practices to track project delivery in Airtable, everyone can be kept in the loop on project status—without having to ask for updates.

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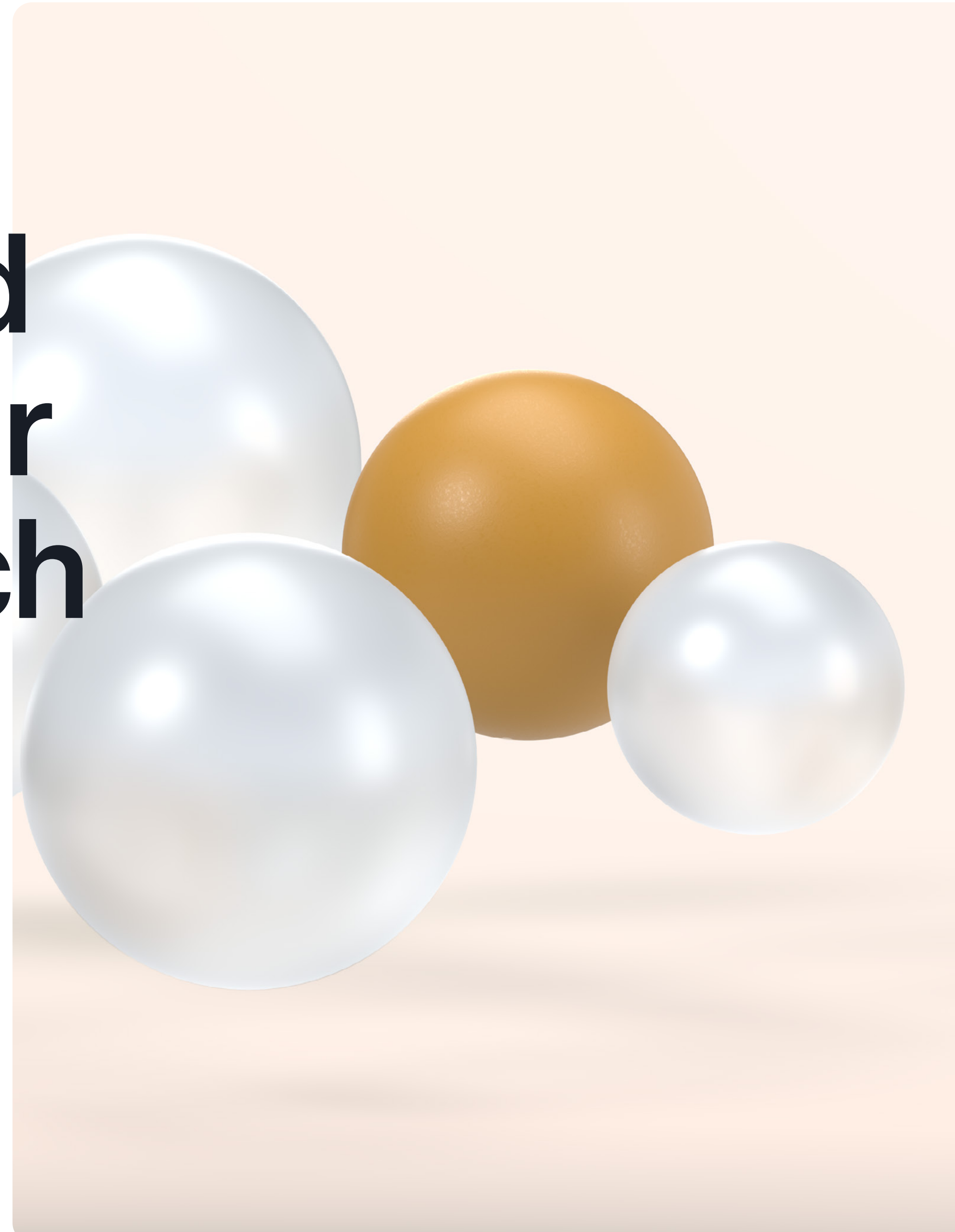
Stage 5:

Managing and reviewing your product launch



Launch day means more than just pushing a button. Reviews need to be documented, last-minute tasks need to be coordinated, and of course, you have to prep to collect feedback after launch.

When teams are scrambling to the finish, it's easy for misalignment to creep in. That is, unless your teams have access to the same information, updated in real time. **Airtable has the flexibility to hold all of the information your team needs in one place—OKRs, roadmaps, sprint tasks, and the like—so stakeholders can stay on the same page.**

Here are some best practices for using Airtable to manage and review your product launch:

Get started managing a product launch

1. To keep everything organized on launch day, your marketing and design teams need to consolidate launch materials. Create a "Launch Assets" table to track it in a central place.

2. See all the assets related to your product launch, from blogs to support documentation. From understanding the status of each asset, to when they'll go live, use views to parse your launch data in different ways.

3. Keep launch reviews on track by automatically soliciting feedback ahead of review meetings. For example, automatically send a Slack message directing to a feedback form in Airtable when certain conditions are met.

Learn more

Drive product launch retrospectives

4. Once you launch, it's time to start capturing feedback. There are a few ways to streamline this in Airtable, but one way to get retrospective feedback across cross-functional product teams is by creating a separate "Retrospectives" table.

5. Collect feedback ahead of a retrospective meeting using an Airtable form, surfacing feedback trends using reporting apps available in the Airtable Marketplace.

Learn more

Scale launch management across the organization

6. To scale launch assets across the organization, sync the "Projects" table from your centralized product ops base with each team's individual bases. For example, sync to the support team base for support documentation, or the content team base for relevant blogs.

7. To manage a release spanning multiple features, consider adding an "Assets/ Materials" table to your Airtable base. That allows you to easily view and manage all of the associated launch materials for each feature.

8. Make the long-awaited launch day as smooth as possible by using Airtable's custom interfaces to create a "run of show" docket that will keep everyone aligned around what's happening.

Learn more

Product launches involve so much more than just day-of logistics. They require clear, company-wide communication. When you implement the workflows above in Airtable, you can get your product out the door on time and make sure teams learn from the process.

Want to dive deeper into these steps for centralizing product feedback in Airtable?

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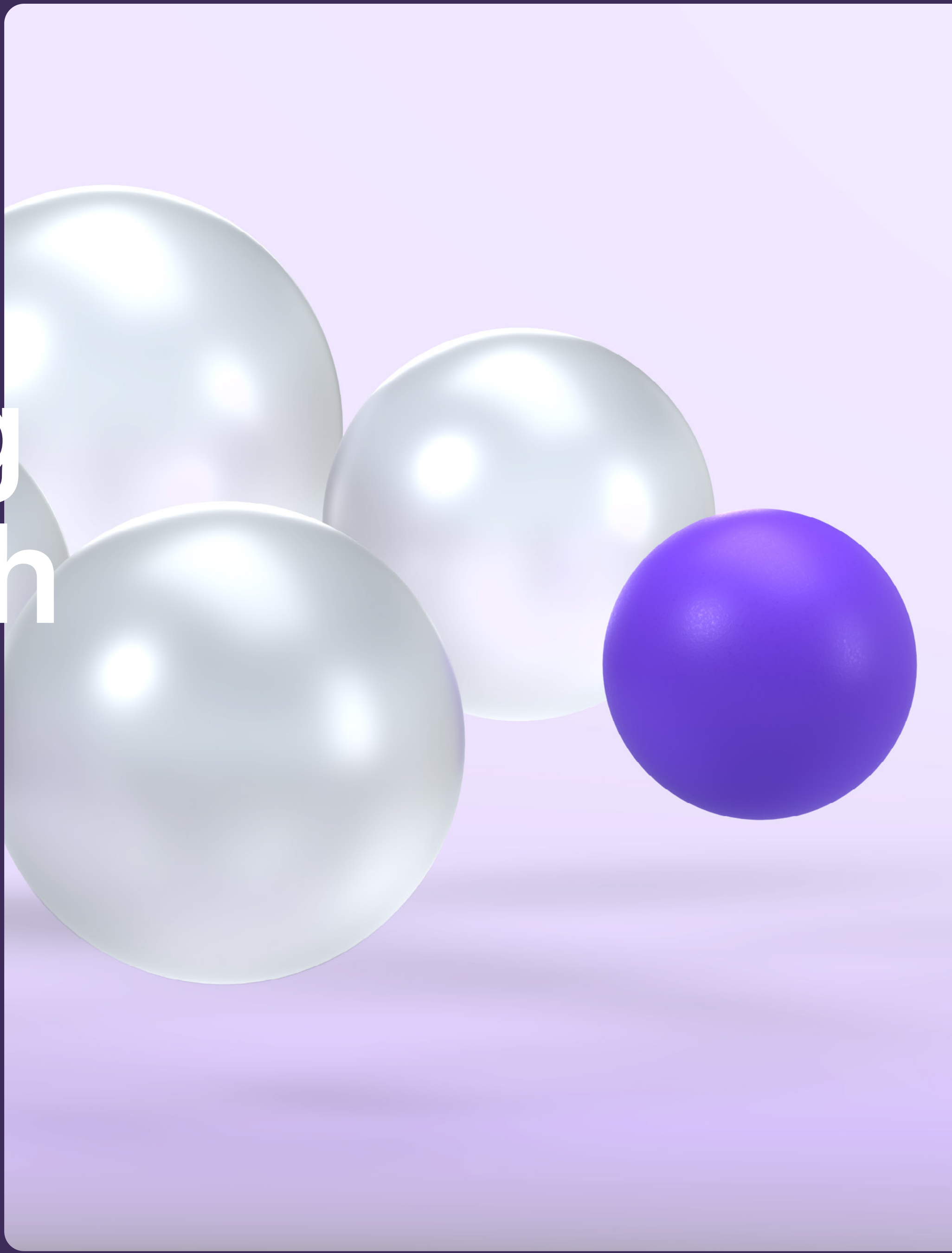
Read more

Stage 6:

Measuring and improving on your launch



So you pulled off your product launch, and you've reached the last stage—measuring your performance and making adjustments.

Learning from, and improving your processes is much easier when you have everything in one place. **By centralizing your data and metrics, you can easily uncover insights—insights you can use when you plan your next product launch.**

Here are a few best practices for using Airtable to reflect on and identify opportunities for improvement in your product ops processes:

Get started reporting results

1. Proactively mitigate project risks throughout the launch process by using reporting tools in Airtable to visualize work progress. For example, track progress on your bill of materials completion to prevent launch delays, or track the progress of OKR completion throughout the quarter so you can take proactive action if OKRs start slipping.

2. Manage overall product ops health by comparing planned to actual results after a launch. Calculate performance metrics in Airtable—around launch dates, OKR goals, and execution accuracy—to help refine future timelines and resource allocation.

3. Aggregate insights across the product lifecycle, creating real-time dashboards customized for the needs of various stakeholders.

Learn more

Understand the business impact of your product

4. To measure the product's impact on your business, start by aggregating metrics at a feature level. From the "Projects" table in your Airtable base, you can create a holistic picture of feature awareness, customer adoption, and impact for any given feature.

5. To understand product impact at a company level, create an executive-level dashboard that surfaces insights like NPS over time and impacted customer ARR. Custom interfaces help leadership and cross-functional partners easily access the data they care about—without having to dig deep into your Airtable base.

Learn more

By following these steps, you'll be able to get the insights your team needs to measure and improve on your processes, allowing you to:

- Reduce time spent manually curating insights on product delivery and results
- Understand product execution accuracy and improve estimation
- Improve customer satisfaction metrics (e.g. CSAT, NPS, CES)
- Increase staff productivity and engagement across the entire engineering, product, and design (EPD) team

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Read more

Redefining the pace of product innovation

Congratulations! You now know how to develop insights-driven roadmaps, deliver new products to market efficiently, and align your work with broader business objectives—all from within Airtable.

When you implement these best practices in Airtable, you'll find that alignment is possible, and taking repetitive tasks off everyone's plates is attainable. Centralizing your product ops process keeps everyone on the same page so you can work together towards your launch—and then start all over again, with even more insight at your disposal.

While these tips will get you started, don't forget that your base is meant to adapt to your product workflows—not the other way around. No matter your team's size, needs, or workflow requirements, having a flexible, fully customizable product ops solution will help you accelerate the pace of innovation and build world-class products that your customers will love.

About Airtable

Airtable is an app platform that enables teams to build workflows that modernize their business processes. More than 250,000 organizations, including more than half of the Fortune 1000, use Airtable’s visual, flexible tools to customize workflows that meet their exact needs, whether they’re creating blockbuster movies, designing running shoes, distributing life-saving vaccines, or anything in between. To learn more, visit airtable.com.

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