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NEWS

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Successfully Planning Localization Projects

By Andrew Jones, Senior Project Manager, Rubric

Write down the following four lines, take them to your computer monitor, and repeat them as your morning recitals:

1. Localization isn't just translation; translation is just part of localization.
2. Localization schedule estimates need to factor in all the elements of localization.
3. Localization cannot be rushed – risks need to be factored into a realistic schedule.
4. ALL your resources, in-house and outsourced, should be booked early and their buy-in to the schedule sought before you finalize it.

Localization is Not Just Translation

Localization is a critical aspect of any globalization cycle. In order for a product to sell into international markets, there is going to be a translation element involved. However, since localization often is the last factor in a global release strategy, too often the details of what this translation process will involve – particularly in terms of timescales and metrics – are very hazy at the early stages of planning, leading to a fraught end to a global release.

Localization is often confused with translation. Even the most savvy clients use the word *translate* when they mean *localize*. Translation is just one of the elements that will get you a version of your product in another language. Alarm bells should ring in your head every time you hear the question, "Can you

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March 2008 Event Review

Silicon Valley Secrets: The New Definition of Product Management

With Marty Cagan, Silicon Valley Product Group

By Susan Monroe

At the beginning of his presentation at the March SVPMA meeting, Marty Cagan noted that he had created the Silicon Valley Product Group because high-tech product management is misunderstood and undervalued across the industry.

If no one wants to buy your product, it makes no difference how good your team is. The product manager is the driver of excellence—the person whose job it is to "discover" the product and to give the engineers something "useful, usable, and feasible to build." Yet, according to industry pundits, significantly more than half of product releases fail. Cagan believes most releases are ill-conceived and companies waste many cycles on products that are neither useful nor usable.

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Feature Prioritization Using the Four Quadrant Matrix

A Simple Technique for Determining Where to Focus Development Efforts for the Highest Payoff

By Brian Lawley

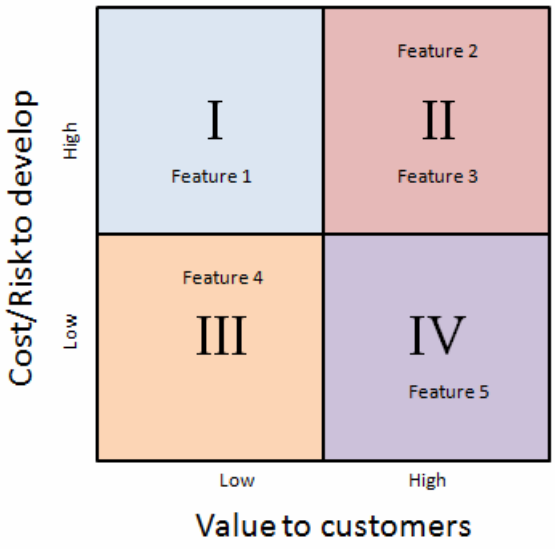
In previous articles, white papers and in my book, Expert Product Management (http://www.280group.com/expertproductmanagementbook.htm), I've covered how to use a feature prioritization matrix combined with techniques such as themes, golden features and timed releases to build out your product plans and determine what should be in each of your releases. Here I'll be covering a technique called the four quadrant matrix.

Many of you are probably familiar with the Boston Consulting Group (BCG) matrix (http://en.wikipedia.org/wiki/Bcg_matrix), which uses growth rates and relative market position to categorize products into cash cows, stars, dogs and question marks to determine where to invest your future resources. The four quadrant matrix uses a similar approach to help you determine where to invest you development resources to achieve maximum payoff.

The concept behind the four quadrant matrix is very simple. On the X axis you map value to the customer (which presumably correlates to increased revenues & drives customer satisfaction, upgrades and additional long-term sales). On the Y axis you put the cost/risk of developing the corresponding feature.

Using a ranking system (usually based on gut feel rather than hard quantitative data, though the more data you use the better) you can then put each of the features you are considering on the matrix to evaluate payoff versus costs.

Here's an example of the matrix:



Note: a template for this matrix is available in the 280 Group free templates folder (http://www.280group.com/280%20Group.zip).

Completing the matrix gives you several useful results:

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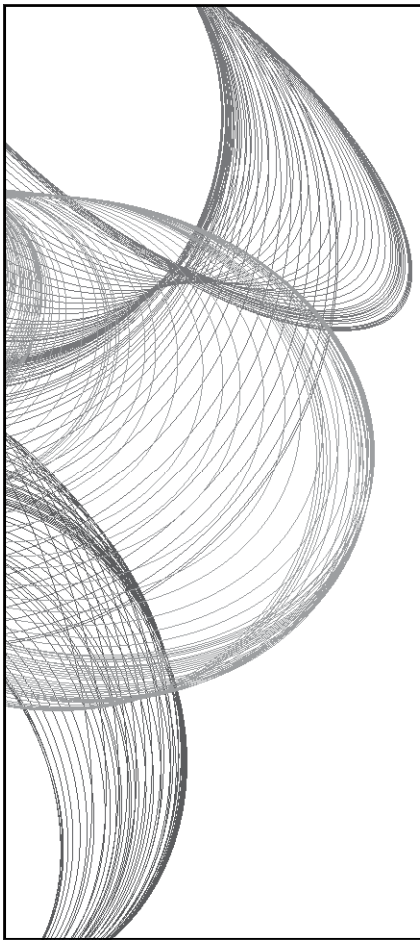
- You can virtually forget about all of the features in Quadrant I (unless they are a critical competitive necessity).
- You can focus on delivering the features in Quadrant IV.
- Features in Quadrant III can also likely either be discarded or noted as "Nice to Have but not critical" in your requirements documents and planning.
- Features in Quadrant II can be studied more thoroughly. Oftentimes these will be the features that provide true differentiation and a strategic competitive advantage in the long run. You'll want to be careful not to discard them due to the risk, but you will want to choose very carefully which you decide to make "Must Have's".

This is obviously a simple method and isn't without its flaws. However, when combined with the feature prioritization matrix (available on the 280 Group website for free and in the Product Roadmap Toolkit) and other techniques it can provide valuable additional insight about where to focus your efforts. It should also be noted that this can be a useful tool for both waterfall and agile development methods (though the risk in using this with Agile is that for teams short sprints you will almost always focus on Quadrant IV and Quadrant II will likely not get the investment that it needs.) ⌘

Brian Lawley is the CEO and Founder of the 280 Group (www.280group.com), a Product Management and Product Marketing services firm that provides consulting, contractors, training and templates. He is also the former President of the Silicon Valley Product Management Association and author of the book Expert Product Management.



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Book Review: Expert Product Management by Brian Lawley

As reviewed by Jeff Lash

Those new to product management often spend most of their time on a few areas -- researching market needs, developing business cases, writing requirements, monitoring development projects. Though these are indeed crucial aspects of the product manager role, there are many other responsibilities that often get overlooked. Not surprisingly, these are the areas for which there are often fewer resources available, so product managers may feel as if they have to "go it alone."

Luckily, Expert Product Management succinctly covers four crucial areas which can improve a product's success. Brian Lawley provides clear, practical advice on Product Roadmaps, Beta Programs, Product Launches, and Review Programs -- the value of any one of these sections alone can justify the reasonable price.

Each section begins with an explanation of the concept and its importance, then covers examples of different approaches and best practices. The writing style makes it easy to read from cover-to-cover and also easy to refer to as a reference. Don't let the size fool you -- at under 100 pages, this can easily be read on a short plane ride -- yet there is sufficient depth to the information contained within to make it practical and actionable.

The chapter on Product Roadmaps is especially comprehensive and useful. Brian describes six different types of roadmaps -- even experienced product managers will likely discover one they were not aware of here -- and presents an easy-to-follow eight step process for creating your own roadmap. Similar level of detail is provided in the other sections -- enough information that the reader can use it as a guide to implementing on the job, though not so much to make it laborious to read or hard to locate later for answers to specific questions.

If there is any flaw in the book, it is that the design of the book itself does not do enough to support the high-quality content. The text and graphics are clear and easy to read, yet a more compelling design could have enhanced the text even further. This is a minor quibble, though, since it is still a very useful resource regardless.

As the name implies, this book may not be the best complete introduction to those new to product management, though that is clearly not its intent. For experienced product managers who have mastered the basics and are looking to take their job to the next level, Expert Product Management is a highly recommended guide which can help already good product managers to better plan, create, and launch a successful new product. ⌘

Jeff Lash is a product manager, user experience designer, and vibraphone player based out of St. Louis, Missouri. He is the author of How To Be a Good Product Manager which can be accessed at http://www.goodproductmanager.com

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He links this problem directly to the product manager. The role may attract the wrong person, and the way it is viewed may be a set-up for failure. The three models used by most Silicon Valley companies are problematic from the outset. They exemplify the old definition of product management:

Market-Driven – The product manager or product marketing manager develops high-level requirements and dispatches them to engineering—bypassing detail and not making tough, but important decisions. Unfortunately, in this environment there's not much respect for the product manager, and as Cagan points out, "You'll never get an iPhone" out of it." Instead of building a product that solves real problems, the manager (and development) team end up bowing to the requests of a few important customers and creating "specials" to meet highly specific needs.

Two People, One Role – Product management is divided between a marketer who's responsible for high-level business requirements and a product manager who's responsible for low-level product requirements. Based on a flawed view of software that believes the two sets of requirements can be defined independently and without concern for the user experience, this role is particularly unrewarding. It almost never results in winning products.

One Person, Two Roles – Here, one person handles product management *and* product marketing. Each role is critical, but it's extremely rare to find someone who can do both jobs well—to say nothing of having the bandwidth necessary. Of course, this role hardly ever delivers anything great, and it doesn't scale as an organizational model.

The new definition of product management rests on understanding that every product needs a CEO.

The key reason so many products fail is that a great many things need to go well, and that requires leadership. The team's hard work goes for naught if the product manager doesn't define a winning product in the first place. The manager only succeeds if the product does. For that reason, the role is rightly viewed as a training ground for senior executive positions—and poor performers typically don't last long enough to rise to the top.

So what does a product manager need to be successful? According to Cagan, the three keys are:

Knowledge of the user – which can only be gained by engaging in frequent, deep customer interaction

Knowledge of the domain – and immersion in the market

Knowledge of the technology – the product manager doesn't need to write the code but must understand its limitations.

This knowledge must exist side-by-side with a laundry list of personal traits that include passion for the product, genuine smarts, an appetite for hard work, and great communication skills.

Cagan concluded with a brief review of the product manager's roles and responsibilities, which should be solidly based on the discovery of a great new product. Confusing them with product marketing or project management is a recipe for disaster. ⌘

Susan Monroe is principal of Written Right, a writing boutique that specializes in creating content for technology companies. A resident of the "upper" Silicon Valley, AKA San Mateo, and a veteran of marcom and PR agencies, she has had the privilege of working with a few great product managers.

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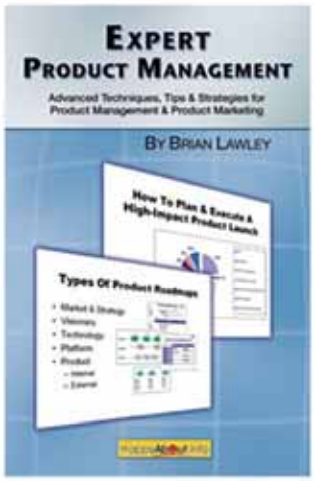

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get this translated into XX?" The danger is that the word *translation* simplifies the task too much.

I've recently worked on two website localizations for two different clients. Both clients came to me and said, "We are releasing our website on XX date in XX language; please can you translate and return the content by then?" The answer to such a question is always "yes." It is always possible to *translate* something quickly. However, if they'd asked, "Please can you *localize* this by XX date?" the answer would have been "no."

Why? Because when I asked, "How many stages will the review cycle have?" they admitted they didn't have anyone to review it. When I asked, "Will you provide a server for testing," they admitted they hadn't thought that the translation would need to be tested. And so on and so forth. When (not "if," but when) this situation arises, you have two choices: release a poor-quality localized version on the agreed release date, or delay the release date, potentially causing internal headaches and external embarrassment. Far better to get a localization schedule worked out, factoring in all the elements, and THEN decide your release-to-market date.

How Long Does Localization Take?

If I had a quid for every time I am asked, "How long will it take to translate," or "What metrics can I use to plan my schedule," I would not be writing this article. I'd be pleasantly retired, sipping margaritas on a beach in Cancun.

You may think, "Why do I need to know this? Why isn't the localization vendor planning my schedule for me?" Once you have selected a localization vendor, you will want them to put together a nuts-and-bolts schedule. Involve your localization vendor as early as possible in the cycle; getting their input and buy-in helps make this schedule realistic. But there are times when you may be asked for input into a global release schedule before you actually select your localization vendor. Or you may need to give a quick answer to an internal question – an answer that could be critical in a global release decision. So it's not a bad idea to have some loose concept for working out how long a localization schedule is going to take.

Metrics

Metric-based guidelines for how long tasks take are a useful starting point in planning. The problem with metrics is that there is a lot more to each individual task in the localization process than is apparent at first sight, and such metrics don't take into account necessary buffers. Chant once again … *localization is not just translation.*

For example, you may hear that an individual can translate about 2500 words a day. So if you have a documentation file with 5000 words to translate, it can be delivered in 2 days, right?

- Have you considered that it is not just a question of the translator sitting down immediately and typing 2500 words?
- Have you considered the time taken for the translator to research the material being translated, and

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to assemble essential glossaries and reference material before starting?

- Have you considered that the file may need to be prepared for translation so that it is in a format that the translators can work with?
- Have you considered that the translation needs to be proofread and edited as well?
- Have you considered that quality translators are always based in country and therefore there are time zones to be considered?

As you can see, the "translation" task alone – and we haven't even considered layout and graphic work that may or may not be needed as well – is actually a set of tasks with interdependencies, which defy simple metrics. A second problem with metrics is that they are effectively meaningless unless you have control over the number of resources that are going to be used. For example, with your 5000 words of documentation, 10 translators are going to complete it in much less time than one translator. However, it is likely that your localization vendor, and not you, will control the number of people working on your translation. Encouraging them to throw resources at the job to speed up the process is not really a wise move because it will also encourage them to compromise quality. Moreover, the sub-tasks involved in translation are not easily resolved with more translators. Can prepping the file for translation be speeded up by dividing it into 10 parts, having 10 people prep their little section, and then sticking it back together? Not really. If you plan your localization schedule with sub-tasks factored in, then not only will you feel in control of the schedule from the outset, but you will not be risking quality at the expense of speed.

So, rather than just adding a single task like "translation" to your estimate, break it down into the real elements involved. Break down tasks by asking yourself questions. Take software testing, for example. You know that the localized versions will need to be tested. Here are some questions to consider:

- Does the software take a long time to build?
- Do you have easy and reliable access to a testing server?
- Do you have a test script, or does one need to be written?
- Do you want the vendor to do a full test or just a smoke test?

Events Around Town

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Monday, May 5 from 5:30 - 7:30 p.m.
DLA Piper, 2000 University, East Palo Alto, CA
SVPMA members can pre-register for the discounted rate of $18, visit http://www.acteva.com/booking.cfm?bevaid=146081 by noon on Friday, May 2.

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Monday, May 12th: 5:30 - 7:30 pm
Pillsbury Winthrop Pittman & Shaw LLP, 2475 Hanover Street, Palo Alto, CA
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More info at: http://www.fountainblue.biz/

- How many platforms do you need to test on?
- How many internal groups will want to test the software?
- Have you factored in a regression test once bugs are fixed?

Each of these questions is probably going to lead to a task – and therefore time – on your schedule.

Factoring in Risks
When using global teams – which most localization project do – there are added, compounded complications and risks. It is possible that none of the risks will materialize, and often they don't, but it is worth creating schedule buffers in case they do.

For example, have you taken account of public holidays? Some countries take holidays more seriously than others, but in many countries certain festivals and

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holidays are sacrosanct. Have you taken into account servers going down, email problems? Sure, it happens to everyone from time to time, but it's not just your own email service you have to worry about – it is the email service of every translator, project manager, and software tester in the localization process. When you get a few words translated into Japanese, those words will actually travel all round the world several times, through any number of email systems, before they return to you in Japanese. Only one computer somewhere on the planet (perhaps in an "electricity optional" locale) needs to fail in order to break the chain and your localization schedule. Three words can end up taking two days to be returned to you, even if the typing of the words only took 30 seconds.

Most of the time these things don't happen. But when they do, it's better to be prepared. Sip some tea, and recite to yourself, *add buffer to the schedule for unexpected glitches.*

Booking All Necessary Resources Early

Internal project coordination

It is always good to involve the localization vendor as early in the scheduling process as possible, rather than handing them a predetermined schedule with zero flexibility. The vendor will have realistic feedback on what can be achieved. They should help you with the breakdown of tasks and think of questions and issues relating to the schedule. A good vendor will also pre-book the best resources to produce the best-quality end product.

You are likely to outsource much of the localization effort to a vendor. Don't fool yourself into thinking this means your staff will not be involved. At the very least you will need an internal contact who has time to liaise with external resources, who can answer or field their questions in a timely manner without delaying the project. Here are some questions to consider in this regard:

- If you are outsourcing testing of your product to external vendors, can the localized version be built and tested externally?
    - If yes, do you have someone who can explain and assist? Book them early and make sure they have the time to help. They won't necessarily need to be dedicated to this task and it might not take more than 10 minutes of their time. But if they are not available when needed, the entire localization schedule can be lost.
    - If no, do you have someone who can set up a staging server internally for testing, and who can provide any support during the testing?
- Do you have people available to fix bugs in a timely manner?
- Are you going to have your own quality assurance checks before the product is released?

If so, how long are you going to allow for this? Who is going to do them?

Internal reviewers

You've been asked by your marketing team to produce a version in a new language because they think it will sell well in that marketplace. It is critical that you get your product reviewed by an in-country representative of your company – or a local partner – so that you can be sure that it meets their preferences and corresponds to their marketing effort. Do you have anyone? Are they booked? These people need to be booked early and for a specific time period, before the localization is complete. Even a day's delay in review

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can throw an otherwise coherent schedule completely off track.

You need to consider how the new version is going to be assessed: does the marketing team have resources, in country, to review the localized version before it is released? Do they have capacity to liaise with linguists on preferred terminology? Do you need to book other types of external reviewers? Are you going to factor in the incorporation of end-user feedback once the product is released in the new market, and do you have the budget and a timescale for this?

These are all questions to consider at the beginning of a global release cycle, as the answers to these questions will impact the date when you realistically release to market with the best experience for the end-user. Remember that the end-user buying in their native language will be doing so for a reason – they will be expecting the highest-quality, most user-friendly experience in their own language.

Scheduling Will Be the End of Us All

Scheduling a localization effort can be tough, but it is a lot easier than keeping an under-planned project on schedule. Here are some parting points to add to your computer monitor:

- First of all and most importantly, never be tempted to think of localization as just translation. If you do, you will be thinking too simply.
- Try to plan localization before your release-to-market date, not the other way round.
- Allow a buffer into your plans, and think of each task as several sub-tasks.

Make sure you consider all your in-house resources needs as early as possible.

⌘

Andrew Jones is Senior Project Manager at Rubric, having worked for the company for the past 8 1/2 years. Educated at Oxford University, Andrew has helped a long list of clients, including Toshiba, Adobe, Computer Associates, Sonic Solutions, SumTotal Systems, Evergreen Solar, Bose and SuccessFactors. In addition to his work in localization, Andrew is Director of Music at "Shakespeare's Church", Stratford-upon-Avon, UK.

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