# PRODUCT LAUNCH ROADMAP

## PRODUCTION TRACK

### PREP WORK

#### Survey Your Target Market

Speak with 50-100 people about your product idea and price point. Use online surveys, focus groups, one-on-one conversations, and sites like Canny to collect feedback.

#### Perform Competitive Research

Search for all the competitors in your space. Brainstorm about how to improve on their offerings and put your own spin on what they do well! Get template here.

#### Create A Design Brief

Create a one-page document that overviews your product design. Use this to communicate with potential factories and partners. Get template here.

#### Secure Reference Samples

It's helpful for factories and design partners to have physical examples of what you want to make. Most people use competitor's samples for this purpose.

#### Set Up A Sourcing Research Spreadsheet

Set up a document to track your outreach to factories and suppliers. Get template here.

### DEVELOPMENT

#### Choose Materials

Make a list of all the materials needed for your product. Source materials to sample with yourself, or request help with sourcing from the person/company making your prototypes.

#### Find A Development Partner

Find a design professional who can help bring your ideas to life. See tips here. Some people choose to work with a factory who offers design services, others opt for a freelance designer; go with whoever has the most design experience with your specific product type.

#### Make 1st Prototype

Make a working prototype of your product. This stage will likely involve pattern-making, tooling and other design-related tasks. "Dummy" materials are okay.

### Test Prototype

Use, wear, and wash your prototype to check for weaknesses in the design or materials. Revise as needed.

### Make Final Prototype

Finalize your design and material choices. This prototype might not be "perfect", but should be at least 90% of the way there. (You can fine tune it with your production factory).

### Coordinate Labeling

What information legally needs to go on your label? Create artwork for your product labels. See list of label suppliers here.

### Coordinate Packaging

How will you package your finished product? Research packaging solutions and design artwork as needed. See list of packaging suppliers here.

### Create A Tech Pack

Use a tech pack to keep all of your important design details in one place and easily transfer info to factories. Fiverr has affordable options and techpacks.co is a great resource.

## SOURCING

### Choose Production Location

Decide where in the world you will produce your product. Check competitors at similar price points or direction.

### Source Production Factory

Interview potential factories who can make your product. Thoroughly vet partners to choose the best one. Get sourcing tips here and browse our factory lists here.

### Source Materials

Will your main factory source and order all materials, labels and packaging for production? If not, find independent sources for these items.

### Negotiate Pricing & Minimums

Do you need a lower price? Or a lower minimum order to get started? Negotiate with factory as needed.

### Identity HST Code

Will you be importing your product? Look up the tariff code associated with your product category here.

## PRE-PRODUCTION

### Submit Purchase Order

Create a formal purchase order and send to your factory. Get template here.

### Make Pre-Production Samples

These samples should be PERFECT before proceeding. Greenlight production in writing to avoid mishaps. [Get template here.](#)

### Carry Out Product Testing

Do you need formal testing performed on your product? [UL](#) and [Intertek](#) offer testing services. The [CPSC website](#) outlines what you are obligated to do (many categories do not have testing mandates).

### Make A Quality Control Plan

Will you be on-site for production? If not, consider hiring a quality control agent. [See list of QC inspection companies here](#).

### Choose A Shipping Partner

Ask your factory for suggestions about how to ship your finished goods. If shipping internationally, you'll need what's called a freight forwarder. [See a list of forwarders here](#).

## PRODUCTION

### Pay Deposit to Start Order

Your deposit should be no more than 50% of the total invoice.

### Establish Timeline

Confirm the timing of the order with your factory.

### Plan For Quality Control

Plan your QC checks in advance. On the day of the inspection, [use a checklist to stay organized](#).

### Negotiate Quality Issues

Request that imperfect product be repaired, replaced, or refunded.

### Pay Final Balance

Once the goods have been inspected, pay your factory the final balance.

## POST-PRODUCTION

### Give Feedback To Your Factory

Share feedback about the order process in order to improve future production runs.

## BUSINESS TRACK

## STAY ORGANIZED

### Set Up A File Management System

It's important to store important files like PO's, tech packs, and product photos in an organized fashion. [Google Drive](#) is free and easy to use.

### Set Up A Supplier Contact Database

Create an easy-to-reference contact sheet of all the players in your supply chain. Get template here.

### Keep Track Of "Materials On Hand"

Create a document that allows you to keep track of your 'materials on hand', such as how much fabric and zippers you have left-over after your production run is complete. Get template here.

### Know The Timing Of Your Supply Chain

To avoid delays, it's important you outline the lead time of each component and process required to make your product. See a sample diagram here.

## LEGAL

### Choose A Business Structure

What type of business structure will you use? Most people start as a sole proprietor or LLC.

### Secure A Seller's Permit/Resale Certificate

You'll need this to collect sales tax. Some material wholesalers also require it to place an order.

### Protect Your Intellectual Property

Will you trademark your logo and/or product name? Does your product design quality for a patent? Here is a list of legal professionals for various budgets.

### Consider Product Insurance

Product liability insurance protects you in the event that someone injures themselves using your product. Certain product categories are more likely to want it (i.e. a baby carrier)

## FINANCIALS

### Create a Budget

Make a list of everything you'll need to spend to get your product off the ground. Get template here.

### Identify Your Funding Method

How much are you comfortable investing in this venture? Do you need to raise or borrow money?

### Open A Business Bank Account

Keep your spending organized with a separate business account.

### Choose An Accounting Software

How will you keep track of your income and expenses? Set up an accounting system, either in a simple spreadsheet or using an online platform like Quickbooks.

## COSTS & PRICING

### Itemize Your Costs

Create a line item list of every cost involved in making your product. Get template here.

### Set Retail and Wholesale Prices

What will you price your product for? If you plan to sell to stores, you'll also need to establish wholesale pricing.

### Project Sales & Evaluate Profitability

Do some basic calculations with your cost breakdown and pricing... can you make money at 100 units? 1,000 units? 10,000 units?

## FULFILLMENT

### Choose A Fulfillment Solution

How will you ship your product to customers? You can DIY it or use one of these fulfillment centers.

### Choose Shipping Materials

Will you ship in plain boxes or envelopes? Or opt for a branded version? Vendors like Packlane and Ecoenclose offer customized boxes and mailers. See a list of suppliers here.

# BRANDING & MARKETING TRACK

## FUNDAMENTALS

### Come Up With A Formal Name

What will you name your business? Poll friends and family on choices or use a site like Pickfu.

### Secure Domain Names

Secure all domain names that directly relate to your business name.

### Secure Social Media Channels

Secure all social media channels that directly relate to your business name.

## BRAND IDENTITY

### Create A Mood Board

Put together images, words and colors that represent what you want your brand to "feel" like. Creative Market offers templates.

### Find A Graphic Designer

Search for a design professional who can help bring your brand to life. We have a list of designers to accomodate all budgets here.

### Design Logo & Brand Assets

Design a logo and your "identity standards" (i.e. font, color palate etc).

## MESSAGING

### Set Tone

What are the words that describe your 'brand voice'?

### Create Brand One-Liner

What is a clear, concise one-line description of your brand?

### Identify The Problem

Come up with a single sentence description of the problem your product solves

### Outline The Benefits

Write out 3-6 benefits that customers will experience when using your product.

*We recommend reading the book 'Building A Storybrand' to help you develop messaging that SELLS.*

## PHOTOGRAPHY

### Create A Shot List

Make a list of all the photos you'll need to sell your product. This will include "on white" still product images, and lifestyle images with models (if applicable). See sample shot list here.

### Find A Photographer

Search for a photographer who fits your style and budget. We have a list of photographers here.

### Plan & Execute Photoshoot

What is needed to have a successful shoot? Think through the location, outfits, props etc.

### Retouch & Resize Photos

You don't always need to shoot every color of each product. It's possible to retouch different colors onto a single image. Flatworld Solutions does affordable retouching. If you need to resize images for your website or other uses, use this free tool.

## WEBSITE

### Choose An Ecommerce Platform

What platform will you use to host your ecommerce store? We recommend Shopify or WooCommerce.

### Create Your Site Architecture

Create an outline of all the pages on your site. Write out the basic functionality and content for each page. See example here.

### Find A Web Designer & Developer

Who will help you build out your site? (Even if you're using a template, you may need help). Get a quote based on your site architecture. We have a list of developers for various budgets here.

### Gather Site Assets

Gather images and write out website copy. (Hint: Your copy should reflect your work in the Messaging section!). You can find a list of copywriters here.

### Upload Inventory To Website

Set up product listings, including images, prices, descriptions and product weights (used to calculate shipping costs)

### Edit Shipping & Delivery Email Templates

Most sites come with pre-built notifications such as order and delivery confirmation. Edit these templates to "make them your own".

### Set Up Sales Tax Collection

Make sure the sales tax settings are accurate. Also, look online for where you need to file sales tax (paid quarterly) and bookmark this page.

### Set Up Lead Magnet & Automated Sales Funnels

Encourage people to sign up for your mailing list by offering a purchase incentive on your website (ex: "Join our list and get 10% off your first order!:). Providers like Klaviyo and Convertkit make email marketing easy to manage. Create an automated sales funnel to nurture your relationship with prospective customers.

### Enable Upsell Features (optional)

Will you email customers who abandon their cart? Upsell add-on products at check out? Many features and apps exist to help you maximize sales.

### Connect With Your Fulfillment Center (optional)

If using a 3rd party fulfillment provider, you'll need to connect the back end of their platform with your ecommerce store for automated fulfillment.

### Test & Proofread Site

Once your site is up, go through each page and test all links and buttons. Place a test order and check email notifications.

### Set Up Analytics

You need to be able to track traffic sources to your site. Your ecommerce store should offer basic analytics and you can use Google Analytics for more in-depth analysis.

### Perform SEO

Search engine optimizing your site will help you rank higher in search results. The HOTH offers budget-friendly SEO help.

# SET UP OTHER SELLING CHANNELS

### Amazon

Selling on Amazon offers access to a big audience but may open you up to copycats. Advertising can help boost your sales.

### Etsy

Is your product Made in the USA in small quantities? You may qualify to sell on Etsy.

### Wholesale

Will you sell to retailers and boutiques? You'll need a line sheet and/or catalog to present your offering.

### Drop Shipping

Many online marketplaces will list your product if you agree to ship directly to the customer. Instead of buying inventory, they pay you when an order is placed.

### Direct Sales

Will you be selling in-person at events or pop-ups? Brainstorm creative ways to showcase your product and accept credit card payments on the go with a tool like Square.

# CREATE A LAUNCH PLAN

Most people choose 2-3 marketing strategies to focus on heavily when they launch. Some people DIY all their marketing, while others hire help. See a list of marketing pros for hire here.

### Friends and Family Pre-Sale

Offer your network special pricing or incentives for supporting the launch of your business.

### Social Media - Organic Content

Choose 1-2 social media channels and start generating content. Engage with your target demographic to grow your following.

### Social Media - Paid Ads

Run pay-per-click ads on the social media channel(s) of your choice.

### Influencers

Ask influencers to promote your product by offering free product or pay-per-post compensation.

### Google Ads/Google Shopping

Set up pay-per-click ads on Google and list your products so that they show up under the Google Shopping tab.

### Affiliates

Ask other companies or individuals to promote your product in exchange for commission. You can use a software like Affiliately to create unique "affiliate links" track sales.

## Host Events

Plan selling events on your own or in conjunction with retail stores or other businesses who would take a portion of sales. Use Square to collect in-person payments.

## Public Relations

Hire a PR expert or send your own pitches to blogs, magazines and TV shows. Here is a sample pitch template.

## Guest Blogging

Write guest posts for blogs with a similar readership to your target market. Here is a sample pitch template.

## Wholesale Outreach

Hit the pavement and ask retailers to carry your line. Scaling Retail and Retail MBA teach you the ropes of getting in stores. Brandboom and EnvoyB2B offer tools to attract retailers.

## Trade Shows

Secure exhibit space at trade shows to reach lots of buyers at once.This option is best for people with multiple products in their line. See a list of trade shows here.

## Crowdfunding

Crowdfunding is a great way to create buzz and even pre-sell your products to cover manufacturing costs. The Crowdfunding Factory is a good resource for running a successful campaign.

# Congrats!

You've made it to the end of the checklist.

Whether you're reading this through for the first time or putting the finishing touches on your launch, remember - we're rooting for you each step of the way!

Don't hesitate to reach out to me with questions - liz@learntomakeaproduct.com



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