Step-by-Step Evaluation Funnel

Stage 1: Initial Triage & Strategic Alignment

Purpose: To quickly filter out issues that are irrelevant, out of scope, or duplicates, ensuring your efforts are focused on what truly matters to the business and your product's vision.

Methodologies:

- **Strategic Alignment Check (using OKRs):** Before anything else, ask: "Does this issue align with our company and product goals?" Your company's Objectives and Key Results (OKRs) are your north star. If an issue, no matter how passionately requested, doesn't contribute to achieving a key result, it's likely a distraction.
    - **How to use it:** Maintain a clear, accessible document of your current OKRs. For each incoming issue, map it to a specific objective. If you can't, it's a strong signal that it's not a priority right now.
- **Problem vs. Solution Analysis:** Stakeholders are experts in their problems, not necessarily in designing the best solutions. Your job is to separate the two.
    - **How to use it:** When a stakeholder says, "I need a CSV export button on the dashboard," you ask, "What problem would that solve for you? What would you do with that export?" You might discover the real need is to share data with a non-technical manager, and a scheduled email report could be a much better solution.

Stage 2: Qualitative Validation - Understanding the "Why"

Purpose: For issues that pass the initial triage, you need to develop a deep, empathetic understanding of the user's context and the pain points they are experiencing.

Methodologies:

- **The "5 Whys":** A simple yet powerful technique for getting to the root cause of a problem. By repeatedly asking "Why?", you move past the surface-level symptoms.
    - **How and when to use it:** Use this in conversations with stakeholders.
        - *Initial Problem:* "The user is asking for a password reset link on the login page."
        - *1. Why?* "Because they forget their password."
        - *2. Why?* "Because they have too many passwords to remember."
        - *3. Why?* "Because they use our app infrequently."
        - *4. Why?* "Because it's a tool for a specific quarterly task."
        - *5. Why? (Root Cause)* "Because there are no other regular touchpoints to keep them engaged." The solution might not be just a reset link, but a way to provide more continuous value.

- **Jobs-to-be-Done (JTBD) Interviews:** This framework focuses on the "job" a user is trying to "hire" your product to do. It's about understanding their ultimate goal and motivation.
    - **How and when to use it:** Conduct interviews with users who have recently "hired" or "fired" your product (or a competitor's). Ask questions that uncover the timeline of their decision-making process, the struggles they faced, and the outcomes they desired. This is invaluable for understanding the *real* value proposition of your product.
- **Customer Journey Mapping:** This is a visualization of the user's experience with your product or service, from initial awareness to long-term use.
    - **How and when to use it:** Create a customer journey map with your team to identify where the reported issue fits into the broader user experience. This helps to understand the emotional state of the user at that point and can reveal other related pain points or opportunities for improvement.

Stage 3: Quantitative Validation & Prioritization - Sizing the Opportunity

Purpose: To use data to measure the scale of the problem and to objectively prioritize it against other validated issues.

Framework	What it is	Pros	Cons	When it's best used
RICE	A scoring system: Reach x Impact x Confidence / Effort	Data-driven, reduces personal bias, forces a holistic view.	Can be time-consuming to gather data for each factor.	When you need a rigorous, data-informed approach for a large number of competing ideas.
ICE	A simplified scoring system: Impact x Confidence x Ease	Quick and easy to apply, good for initial prioritization.	Can be subjective, lacks the "Reach" component of RICE.	For early-stage products or teams that need a fast and simple way to get a directional sense of priorities.
Kano Model	Categorizes features based on their potential to satisfy customers: Basic, Performance, and Excitement.	Focuses on customer delight, helps to balance different types of features.	Can be complex to implement fully (requires user surveys), doesn't directly provide a prioritized list.	When you want to ensure a balanced product strategy that includes must-haves, performance improvements, and innovative features.

MoSCoW	Categorizes requirements into: Must-have, Should-have, Could-have, Won't-have (for this release).	Simple to understand, great for communicating priorities to stakeholders.	Can lead to everything being labeled a "Must-have," requires strong facilitation.	When working with fixed deadlines or releases, and you need to clearly define the scope with stakeholders.

2. Impact: How Much Will This Affect Each Person?

Core Concept: "Impact" aims to quantify the *degree* of influence your initiative will have on the individual user. While Reach measures *how many*, Impact measures *how much*. Will this change be a minor convenience or a game-changer for the user's workflow?

How to Measure It: Impact is the most qualitative part of the RICE score, so it's best measured on a standardized scale to ensure consistency across different projects.

- **The Question to Ask:** When a user encounters this change, how significant will the impact be on their goal or problem?
- **Standardized Scale (common practice):**
    - **3** = Massive Impact (e.g., a game-changing feature that directly impacts conversion or solves a major pain point)
    - **2** = High Impact (e.g., a significant improvement to a workflow, a "wow" feature)
    - **1** = Medium Impact (e.g., a noticeable improvement, but not a core differentiator)
    - **0.5** = Low Impact (e.g., a minor tweak or quality-of-life improvement)
    - **0.25** = Minimal Impact (e.g., a small aesthetic change)

Practical Example: Let's continue with our e-commerce ideas:

- **Idea A: Redesign the Checkout Button.** While many people will *see* it (high Reach), changing the button's color might only slightly improve the user experience. You might estimate the Impact as **0.5 (Low)**.
- **Idea B: Add Advanced Reporting for Power-Sellers.** For these 200 sellers, this feature could be transformative, saving them hours of manual work each week and directly helping them sell more. The Impact is **3 (Massive)**.

This component helps to balance out high-reach, low-value features with low-reach, high-value ones.

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3. Confidence: How Sure Are We About Our Estimates?

Core Concept: Confidence is your reality check. It forces you to acknowledge the uncertainty in your Reach and Impact estimates. A big idea based purely on a hunch is riskier than a smaller, well-researched one. This factor tempers enthusiasm with a healthy dose of skepticism.

How to Measure It: Confidence is expressed as a percentage. This allows you to communicate your level of certainty clearly.

- **The Question to Ask:** How much data and evidence do we have to support our estimates for Reach and Impact?
- **Standardized Scale:**
    - **100%** = High Confidence (You have quantitative data from user testing, market research, and analytics to back up your claims).
    - **80%** = Medium Confidence (You have qualitative user feedback and some analytics, but it's not a complete picture).
    - **50%** = Low Confidence (This is largely based on intuition or a single customer request. You have no hard data).
    - **<50%** = "Moonshot" (A pure guess or a wild idea).

Practical Example:

- **Idea A: Redesign the Checkout Button.** Your analytics clearly show the number of users (Reach). However, the Impact score is more of a design hypothesis. You might have run a small A/B test that showed a slight lift, so you could set your Confidence to **80%**.
- **Idea B: Add Advanced Reporting for Power-Sellers.** The Reach is certain (you know how many Power-Sellers you have). The Impact is based on interviews with just three of them. It seems massive, but the sample size is small. You might set your Confidence to **50%**.

Confidence is a crucial tool for promoting intellectual honesty and encouraging the team to seek out data before committing resources.

4. Effort: What's the Total Cost to Get This Done?

Core Concept: Effort represents the total amount of time and resources required from your team (product, design, engineering, QA) to bring an idea to life. It's the denominator in the RICE equation, meaning that high-effort projects will see their scores reduced, while low-effort projects will be boosted.

How to Measure It: Effort should be measured in units of "person-months" (or "person-weeks" for smaller projects). This captures the total work, not just the calendar time.

- **The Question to Ask:** What is the total estimated time this will take from all involved team members (design, development, testing)?

- **Estimation Unit:**
    - **Person-Month:** One person working on a project for a full month.
    - *Example:* If a project requires 1 designer for 2 weeks, 2 engineers for 4 weeks, and 1 QA tester for 1 week, the total effort is roughly (0.5 + 2 + 0.25) = 2.75 person-months.
    - **Simplified Scale:** Some teams use a T-shirt sizing (S, M, L, XL) or story points scale (1, 2, 3, 5, 8) and convert it to a numerical value. For instance: S=1, M=2, L=3, XL=5. The key is consistency.

Practical Example:

- **Idea A: Redesign the Checkout Button.** This is a small task. A designer needs a few hours, and an engineer needs maybe two days. The total effort is minimal. Let's estimate it as **0.5 person-months**.
- **Idea B: Add Advanced Reporting for Power-Sellers.** This is a major undertaking. It requires significant design work, complex backend logic for data aggregation, and a new frontend interface. The team estimates this will take **3 person-months** of work.

Putting It All Together: The Final Calculation

Now let's calculate the RICE scores for our two competing ideas.

Idea A: Redesign the Checkout Button

0.5(Effort)10,000(Reach)×0.5(Impact)×80%(Confidence)=0.54000=8000

Idea B: Add Advanced Reporting for Power-Sellers

3(Effort)200(Reach)×3(Impact)×50%(Confidence)=3300=100

Conclusion: Despite the "Advanced Reporting" feature feeling more substantial and impactful on an individual level, the RICE scoring model clearly indicates that the **Checkout Button Redesign is a much higher-priority initiative**. It provides a massive return on investment by reaching a huge number of users with a tiny amount of effort, even if the individual impact and confidence are lower.

This is the power of RICE: it forces a balanced perspective, preventing teams from getting bogged down in high-effort projects that serve only a few, or from prioritizing pet projects that lack data-backed confidence. It provides a clear, structured, and defensible method for building your product roadmap.