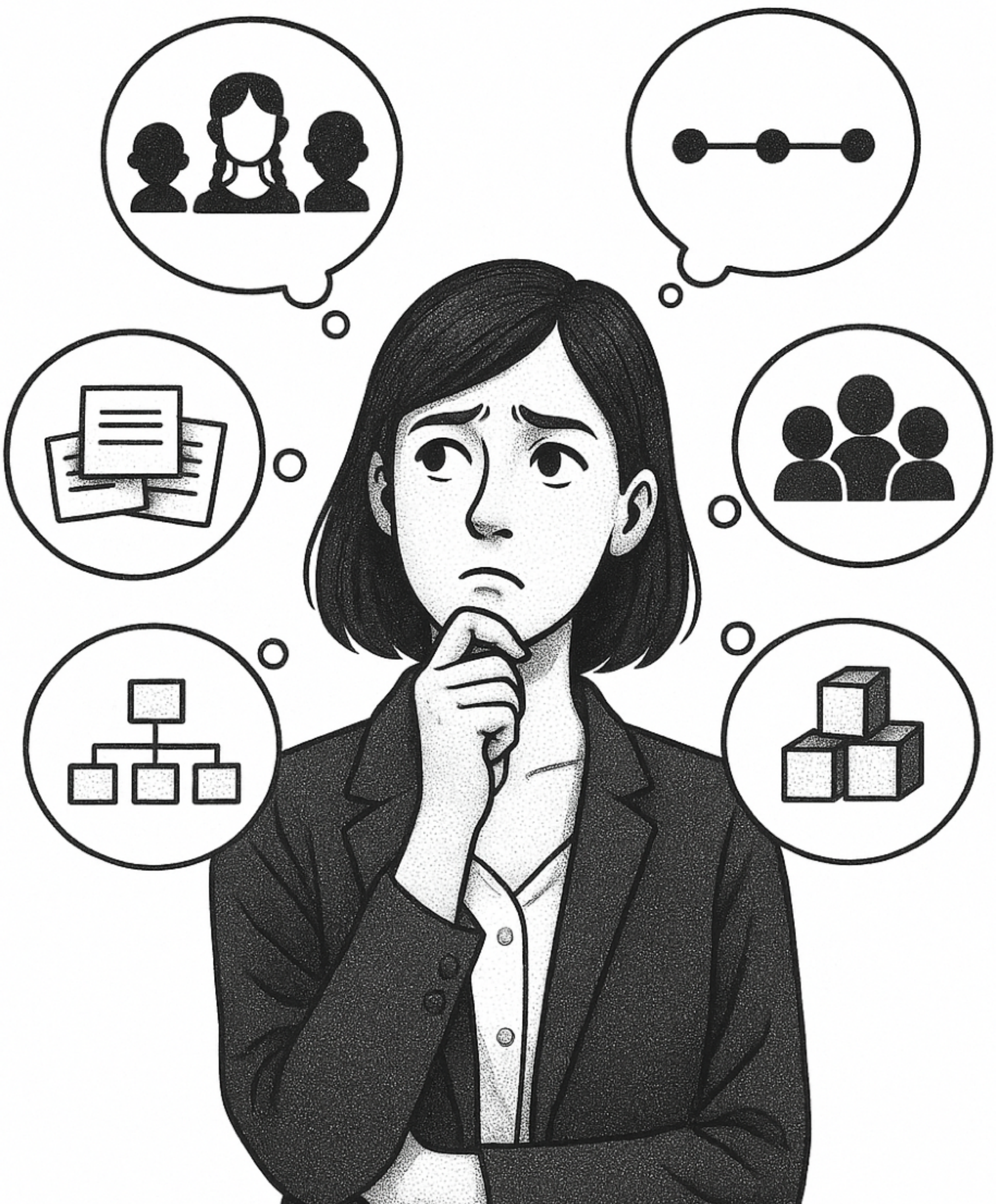
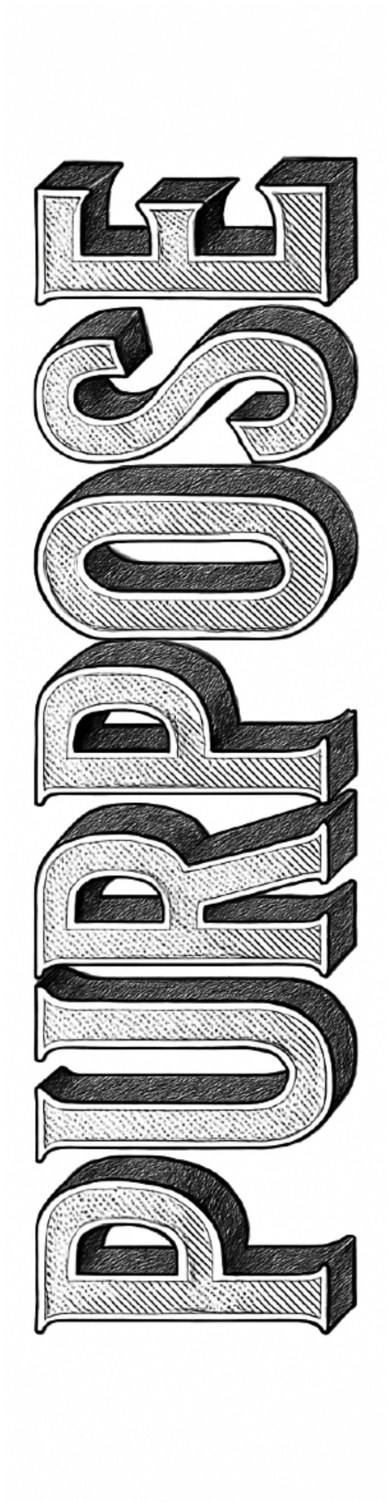
Alexander Kramer

PURPOSE

Project onboarding at ease




PURPOSE

1. Introduction

1.1 Why PURPOSE?

In many projects, I have experienced that new product owners, project managers, or even existing team members often ask themselves:

What exactly are we doing here?

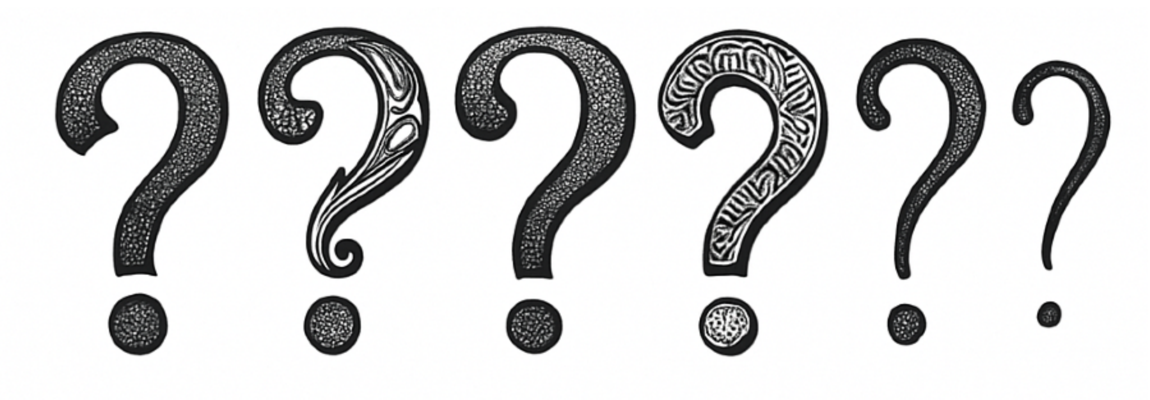
To quickly and thoroughly immerse oneself in an existing project—or to bring a new idea or feature stage into a structured framework—I developed the PURPOSE method.

1.2 Goal and Benefits of the Method

The PURPOSE method offers a compact, easy-to-remember structure to understand the core elements of a project and align everyone involved around a shared understanding. It supports project managers, product owners, and interdisciplinary teams in efficiently onboarding and making decisions based on transparency, priority, and purpose.

1.3 Who is this eBook for?

This guide is for product owners, project managers, and team leads who want to gain a fast yet thorough understanding of project goals, structures, and responsibilities. It also serves anyone who needs to quickly onboard into a running project or bring clarity to a complex environment.



2. **P** | Personas

2.1 Understanding Target Audiences

To enable targeted development, we must understand the needs of our target audience. We can only achieve this if we put ourselves in their shoes—understanding their daily lives and circumstances. This helps us identify pain points and optimize our products for more effective use and additional value.

To capture the diversity of a user group, it makes sense to identify shared traits and summarize them in a way that allows us to reduce the group to a single fictional representative. This fictional person is called a persona.

2.2 Developing and validating personas

For example, if more than 50% of your users own a dog, and that detail is relevant to your service, then your persona should reflect that. The same applies to demographics, location, and preferences. It's often useful to define multiple personas to explore contradictions and build strategies to address them.

You'll find many templates and tools online to create personas, but go beyond simple demographics. Consider their professional and private life, influencers, sources of information, values, daily routines, and whether they're driven by pragmatism, recognition, or security.

The goal isn't to reduce your perspective to just one persona. On the contrary, it can be helpful to develop multiple personas—as long as they're still based on the core characteristics of your target group. This helps uncover contradictions and create strategies to resolve them.

For example: one half of your audience wants a premium product and is fine with long delivery times, while the other expects a low-cost item with immediate availability. This insight can help shape product development—by diversifying your offering, focusing on a core target group (and deliberately ignoring others to strengthen brand positioning), or creating a sub-brand that fulfills the needs of the secondary audience.

Important to remember: You will never be able to please everyone. Personas also help when it comes to dealing with criticism from certain user groups or individuals with specific traits.
Ask yourself: Is the criticism coming from one of our personas—or not?
If not, then perhaps that feedback shouldn't carry too much weight in your decisions.

2.3 Practical Tools and Methods

There are countless templates, tools, and guides available for creating personas. However, one should not limit the focus to classic demographic features such as gender, age, or income. Far more insightful are qualitative factors like professional and personal environment, sources of information, daily routines, values, and attitudes:

- What influences the target audience's decisions?
- Where and how do they get their information?
- What does a typical day look like?
- What matters more to them: career or work-life balance, status or functionality?
- Do they act more emotionally or rationally?

Even simple market research methods can be helpful when developing initial personas. A low-barrier approach could be an informal street survey, for example:

- “What is particularly important to you in a product from category X?”
- “How much did you spend in this area last year?”
- “What media do you consume regularly?”

When combined with basic demographic information (age, gender, place of residence), this can already lead to well-founded hypotheses about the target group. For instance:

> *“Women aged 20–29 from rural areas spend above-average amounts on product X and place great importance on feature Y. Their preferred information source is channel Z.”*

Personas are certainly not a perfect tool. But in practice, you almost inevitably end up creating them. If you were marketing children’s toothbrushes, would you spend your marketing budget placing ads in a student magazine?
Or would you think about where to best reach your actual audience?

At that point, you’re already defining your persona.

3. **U** | Use Cases

3.1 From Problem to Solution

The PURPOSE method is not primarily designed to create a completely new concept for an undefined product. Rather, it aims to refine an existing concept or realign ongoing product development.

If there is no concrete product idea or vision yet, then a problem statement (or task definition) for the target group can serve as a basis for creating use cases.
For example: **“Users should be enabled to access service X via channel Y to achieve outcome Z.”** A more concrete version could be: “Our existing customers should be able to view the status of their order via an online portal, to reduce inquiries about processing status.”

From there, we can gather the use cases necessary to achieve this outcome.

Important: **At this stage, use cases should be considered on the epic level, not the story level.** So instead of: “Implement product X in permission system Y,” it's better to write: “Provide a unified login across all services.”

This is the moment to think big – details can be broken down later through the roadmap and prioritization steps.

If the PURPOSE method is used regularly, the question becomes:

- What has changed since the last time we defined use cases?
- Are we still on the right track? Then we’ve validated those points and can move forward.
- Do we even have the tools to analyze and understand the current and desired state (e.g. via tracking methods, surveys, FAQ evaluations from customer service)?
- Have new opportunities emerged due to market trends, competitors, or technology shifts?

By now, a list of use cases should be forming. But before these can be properly prioritized, we need to clarify a few framework conditions:

- Are there time constraints for certain services?

- Are there important dates or deadlines we must consider (e.g. holidays, trade shows, press releases, school breaks, expiring contracts, legal changes)?
- Do we already have a (development) team?
- Will that team change in the near future?

All project-related conditions should be collected. This point overlaps with prioritization and organization, because in the "magic triangle of project management," the three goals – Time, Cost, and Scope/Quality – are always interconnected.

If scope X with quality Y is expected to be ready by next month, the challenge is completely different than if we had three months for the same goal.

That's why we need the roadmap to guide our prioritization of scope, and the orga step to clarify the resources needed – or to adjust the roadmap and priorities to fit the resources available.

Once a sufficient number of use cases has been gathered, it becomes essential to understand the framework conditions for implementation – especially in terms of timing, resources, and external dependencies.

Here are a few guiding questions:

- Are there fixed deadlines or specific launch dates for certain services (e.g. trade shows, seasonal campaigns, regulatory changes)?
- What internal resources are available?
- Is there already a development team, or is that team expected to change in the near future?

These framework conditions are closely linked to other PURPOSE elements such as Prio (Prioritization), Orga (Organization), and Roadmap.
In line with the "magic triangle" of project management – consisting of time, cost, and scope/quality — these three dimensions are always interdependent.

A simple example:

If scope X with quality Y is expected to be delivered next month instead of in three months, the project will face entirely different demands – and therefore needs a different kind of planning (e.g. more focus on feasibility, minimum viable scope, or outsourcing in case of limited capacity).

3.2 Why is “Cost” not a component of the PURPOSE method?

Why doesn't the topic of costs appear explicitly in the PURPOSE method?

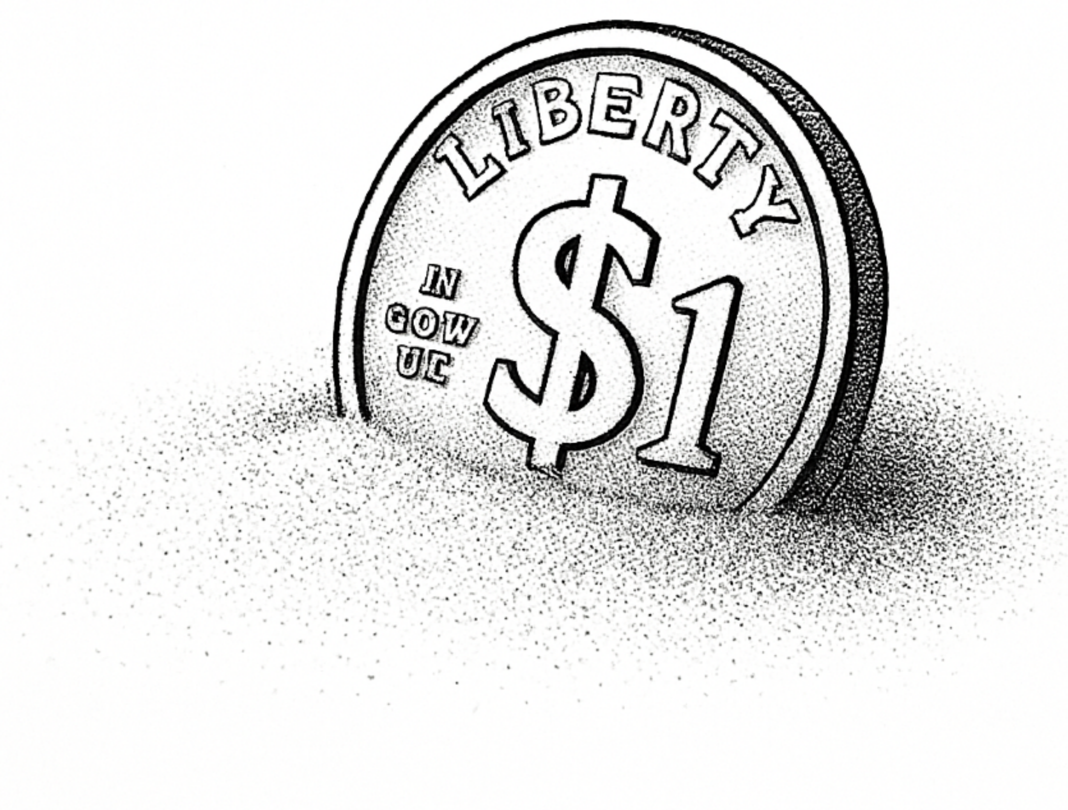
In many organizations, budget transparency is not intended or desired for all participants – due to confidentiality, internal role structures, or strategic communication concerns.

The PURPOSE method therefore deliberately avoids a dedicated “Cost” module to facilitate interdisciplinary collaboration – regardless of whether individual team members are allowed insight into financial matters.

At the same time, it’s clear that cost factors significantly influence project success.

That’s why at least one person involved in the process should have access to the necessary budget information and be able to flag unrealistic planning early on.

This allows open questions and uncertainties to be documented and followed up – without disrupting the shared work within the team.



4. **R** | Roadmap

4.1 Planning Despite Agility

“But we work agile – do we even need a roadmap?”

This question comes up often — especially in agile teams that intentionally rely on short-term planning and iterative processes. In truth, agility is not a contradiction to having a roadmap — rather, it’s an invitation to approach roadmaps more flexibly and dynamically.

A quick look back:
In 2020 – at the start of the COVID-19 pandemic – countless business plans became obsolete within weeks. Whether it was a coffee shop, a food delivery service, or a business travel app: the market shifted radically.

The companies that survived weren't the ones with the best plan or the clearest vision – They were the ones most able to adapt to rapidly changing conditions. Many had to temporarily adjust or even abandon their original goals and business models just to remain economically viable.

The coffee shop turned into a testing center.

The delivery service had to scale up within weeks – and later scale down just as quickly.

The travel app transformed into a platform for entry regulations, instead of offering high-end restaurant recommendations.

No matter how flexible the roadmap might have been – reality would’ve overtaken it. So what’s the point of a roadmap – and what are its limitations? In the case of COVID-19 and the forced flexibility that came with it, a roadmap could still help by creating clarity across the team or organization.

For example:

“Starting October 1st, we will open a test center at this location. We’ve secured an annual lease until September 30th of next year. If we want to extend our operations for another 6 months, we need to renew the contract by June 30th.
We need everyone to let us know by the end of next week whether they’re on board with this plan or not.”

In this case, the roadmap doesn't limit agility – It defines the framework within which agility can unfold.

The roadmap is heavily influenced by organizational structure – and that should always be kept in mind.

For example, if internal company policies specify, “All development work must be done in-house”, this affects both the organization (What skills are needed, and for how long?) and the roadmap (What does the current job market for these skills look like? How long will it realistically take to onboard and integrate this expertise into the team?).

So, it's not just about a product roadmap – but rather a skills roadmap, an event roadmap, a competitor roadmap, etc. Any event or factor that can (or must) be anticipated and incorporated into early planning helps deliver the best possible outcome.

4.2 **Taking Action Under Uncertainty**

Agility, in this context, means:

The ability to act under conditions of uncertainty.

A roadmap doesn’t help because it enforces rigid plans – It helps because it creates a shared starting point – one that can be consciously adapted or abandoned during moments of crisis.

Because even in agile environments, capacity planning, budget alignment, and external dependencies (like trade fairs, legal deadlines, or seasonal shifts) still need to be accounted for. Management and stakeholders often require planning frameworks in order to define strategic boundaries and communicate clear goals.

If planning is limited to short, two-week cycles, the bigger picture is easily lost – long-term developments can fall through the cracks, coordination efforts increase disproportionately, and day-to-day work often suffers due to a lack of structural orientation.
The result: decreased quality, lower efficiency, and a weakened product focus.

A roadmap provides balance here.

> It’s not a rigid schedule, but a living tool that helps align direction and adaptability.

5. **P** | Prio (Prioritization)

5.1 Criteria for Meaningful Decisions

Now that personas, use cases, and a timeframe have been defined, the next question is: Which use cases should be implemented, and in what order, within that timeframe?

Ideally, the spectrum of identified use cases is broad enough to fill – or even exceed – the available time window, at least on a thematic level.

It is explicitly encouraged to also include follow-up or adjacent tasks such as:

- Rollout planning
- Subsequent versions
- Support and maintenance processes
- Strategic extensions

These tasks are then prioritized, based on criteria that should ideally be defined beforehand (or during the initial PURPOSE kickoff session).
If decision-makers or evaluation criteria have not yet been defined, now is the time to establish them.

Possible prioritization criteria include:

- Value for the customer
- Value for the company (“the manufacturer”)
- Technical or organizational independence
- Resource availability and assignment
- High-visibility “quick wins”
- Time sensitivity (e.g., legal deadlines, product launches)
- Mandatory elements / “must-dos”

5.2 Methods for Prioritization

Even though it was originally designed for user stories, the INVEST model can be a useful framework for evaluating use cases as well:

- **Independent** – Not dependent on other teams, stories, or technical components
- **Negotiable** – Not fully predefined; open to discussion and input from the team
- **Valuable** – Clearly delivers added value
- **Estimable** – The effort can be reasonably estimated
- **Small** – Small enough to deliver value quickly
(“first the weather balloon, then the airplane, then the spaceship”)
- **Testable** – The outcome can be verified and measured

There’s often a strong temptation to work on everything at once, which makes prioritization difficult.
In such cases, structured methods can help – for example, a scoring matrix where each use case is rated against defined criteria.

Other useful techniques include:

Card Sorting – The team actively places tasks in order of importance or impact

Justification Requirement – Each priority decision must be backed by reasoning, encouraging clarity and reflection

User Involvement – Where appropriate, selected customers or user types can be included in the evaluation process

It's important to note that disruptive innovations are often not recognized or appreciated by users at first[1]. Such ideas can easily be overlooked in structured rating exercises – due to unfamiliarity, reluctance to change, or lack of context.

That’s why teams must consciously assess whether the **innovative potential of a concept is strong enough to justify initial resistance**[2].

5.3 From Use Case to MVP

Once the prioritized use cases have been defined, the next step is to break them down into actionable stories – in collaboration with developers, designers, and other stakeholders.

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[1] Disruption

[2] Change

This typically leads to the definition of an MVP (Minimum Viable Product), which can then be expanded iteratively.

It's important to view the MVP from two perspectives:

> External – What do users minimally need to gain real value?
>
> Internal – What do we need to effectively work with the resulting data, outcomes, or processes?

Only when both viewpoints are considered does the MVP become not just marketable, but also sustainable in the long term.
I like to call such a product an "MVP²" – a Minimum Viable Product that works both for the user and the internal processes.

A compelling example of why an MVP that ignores internal factors can cause problems is the digital BAföG student grant application in Germany.
A caseworker at the Regensburg Student Services office described the situation in 2024 as follows:

> *"Right now we're facing a huge increase in workload – because the application is digital, but the processing is not. In the past, applications came in by mail and we could just file them directly. Now everything has to be printed, sorted, and assigned manually.[3]"*

The lower barrier provided by the digital application led to a significant increase in applications. At the same time, internal processing became more complex and time-consuming, as clerks were still working with analog workflows – but now had to manage digital input on top of that.

The result? Longer processing times than under the previous, fully analog method.

An MVP² would have recognized that not only the application process, but also the internal downstream processing needed to be digitalized.

In this case, a better solution might have been to improve the dark processing of analog applications – meaning automated processing without manual intervention – and then digitally format the captured data for further use.

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[3] https://taz.de/Digitalisierung-beim-Bafoeg/!5979785/ (German)

6. **O** | Orga (Organization)

6.1 Planning Roles and Resources Effectively

Once it’s been defined who (persona), what (use cases), and when (roadmap) needs to be implemented, the next key question arises: By whom?

In well-established teams, the answer might seem obvious at first glance.
Still, it’s worthwhile to critically assess the current team structure and available resources:

- Does the team have the right mix of skills, availability, and budget efficiency?
- Do external experts need to be brought in – for specialized knowledge or short-term support?
- Are additional tools, plug-ins, libraries, or other resources required?
- Do other departments or external stakeholders need to be involved – such as marketing, legal, data protection, or IT security?

6.2 Dealing with Bottlenecks and Change

It is often in this stage that organizational limitations become visible – factors that can impact or restrict the originally planned execution.

A bottleneck in another department, limited system capacity, or a pending decision at management level – any of these can affect implementation.

That’s why planning at this point should be understood as an intention, not as a rigid mandate.

If it becomes clear during the PURPOSE process that certain use cases can’t move forward due to delays or blockers, these should be postponed.
In turn, other use cases from the pool can be moved forward to make the most of available resources.

6.3 Communication and Team Structure

Existing structures can't always be easily changed or dissolved in the short term.
Changes in the team – such as new role distributions, restructuring, or external additions – should therefore be **carefully communicated and explained.**
Most importantly: any change must be understandable for those involved and offer a clear added value.

Being open about expectations and perspectives helps maintain motivation within the team.
Good product or project managers not only focus on operational execution, but also keep an eye on the team's development and dynamics – including transitional phases or changes in personnel.

It's also important to note that not all team members are fully aware of their own strengths and weaknesses.
An innovative developer may not be great at writing clearly structured tickets.
A UX designer may not have deep knowledge of backend interfaces.
If team members don't have a realistic view of their capabilities, even team leads can struggle to determine whether the group has the right composition for the tasks at hand.

Especially in newly formed teams – and especially when leadership is also new – a getting-to-know-each-other phase should take place before the PURPOSE session.

Playful approaches can be helpful to explore both soft and hard skills – without turning the process into a stressful assessment.

Example:
Each team member creates a small "Pokémon-style card" in a shared Miro template, including:

- Name
- Core Skill + Strength Score (1–10)
- Personal Superpower

As the team lead or Scrum Master, this also gives you the opportunity to predefine certain skills or attributes you'd like to see in the team.

These might include classic competencies (like programming languages or backend/frontend preferences), but also softer traits such as a love for documentation, organizational talent, or a willingness to take on operational responsibility.

7. **S** | Stakeholder

7.1 Who Counts as a Stakeholder – and Why?

One often underestimated success factor in projects is the early and deliberate involvement of relevant stakeholders. Only when key parties are properly informed – for example, about missing tools, limited resources, or other impediments – can they actively support the project or help remove roadblocks.

A stakeholder who is unaware of challenges can't offer assistance or respond constructively when plans go off track.
The opposite is also true: experience shows that when potential obstacles are communicated openly and early, it not only fosters understanding – it often increases the willingness to help with pragmatic solutions.

But who exactly are stakeholders?

Originally, the term referred to internal employees who held a "stake" – i.e., a personal interest – in the project's success. A sales director, for example, has a clear interest in sales performance and should not only be informed about relevant marketing initiatives, but ideally involved early in the process.

Today, the term is interpreted more broadly:
Stakeholders are any individuals or groups who have an interest in the process or outcome of a project.
This includes not just managers and internal departments, but also customers, external partners, team members, or advisors.

Key questions in stakeholder management include:

- Who is affected by this initiative, development, or outcome?
- In what way is this person or group impacted?
- How can they contribute to the success – or failure – of the project?

Yes, stakeholders can also contribute to failure.

Especially when a project introduces disruptive or structural changes, it's important to consider people who might resist those changes.

This is particularly true when, for example, digitalizing processes leads to organizational restructuring or role changes that affect personnel.

7.2 RACI, Delegation Poker & Co.

A proven tool for structuring stakeholder responsibilities is a RACI diagram[4].

It helps assign project roles clearly and transparently:

- R – Responsible: Who is doing the actual work?
- A – Accountable: Who holds ultimate responsibility for the outcome?
- C – Consulted: Who needs to be consulted during planning and execution?
- I – Informed: Who should be kept up to date?

An alternative or complementary approach is using "Delegation Poker", which allows teams to define levels of involvement in a playful but structured way.

While these processes may seem time-consuming or bureaucratic at first, they pay off in the long run.
A clear stakeholder assignment helps avoid unpleasant surprises – such as someone asking in the middle of a project:

> *"Wait… did anyone actually talk to XY about this?"*

Such unexpected input can call existing plans into question or even derail them completely – especially if the person involved holds significant influence within the organizational hierarchy.

A RACI diagram not only provides clarity, but also offers protection. If it's established and documented at the start of a project who is involved in which role, it becomes much harder later to raise the objection: "No one ever asked me about this".

Particularly if that person had already agreed to an "Informed" role.

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[4] More details: asana.com/resources/roles-and-responsibilities

7.3 Transparently Involving Stakeholders

Even without a formal RACI framework, effective stakeholder management is possible – the key is to ensure clear and transparent communication:

- Who are the relevant stakeholders?
- How frequently and through which channels are they engaged or informed?
- Which formats and rhythms make sense – for example, a weekly status update with the team lead, a monthly review with the department, or a quarterly demo call with clients?

It's equally important to remember: Stakeholders change.

New colleagues, departmental restructuring, personnel bottlenecks, or shifts in resources all require regular review of the stakeholder landscape – and may provide important insights for the current project or future planning.

8. **E** | Engage!

8.1 Make Results Visible and Actionable

Throughout the PURPOSE method, a wide range of insights, requirements, and perspectives from different areas are gathered. Especially for colleagues who were not directly involved in the process, a common and justified question often arises afterward:

> *"What did the PURPOSE workshop actually achieve?"*

To ensure that all participants develop a shared understanding and pull in the same direction, a structured summary should be created and shared after the workshop or planning session. Ideally, this summary is written in clear, accessible language that communicates both the relevant content and the next steps transparently.

8.2 PURPOSE as a Structured Communication Sentence

A proven way to condense the results is by creating a single sentence that reflects all elements of the PURPOSE method in a compact, logical structure:

- Who (P) wants to do What (U)?
- When (R) do they need Which services or results (P)?
- How (O) do we organize ourselves – and Who (S) needs to be involved?

Here's an example from the automotive financing sector:

Our car dealers want to finalize contracts by the end of the year to secure their annual bonuses. To achieve this, they need a system by December that quickly and clearly displays the status of their submitted documents and contracts.

To implement this, we need a cross-functional team, supported by experts from billing and document processing.

The first ideation workshop is scheduled for calendar week X (led by Max Mustermann), and the resulting requirements should be turned into initial tickets for Sprint Y.

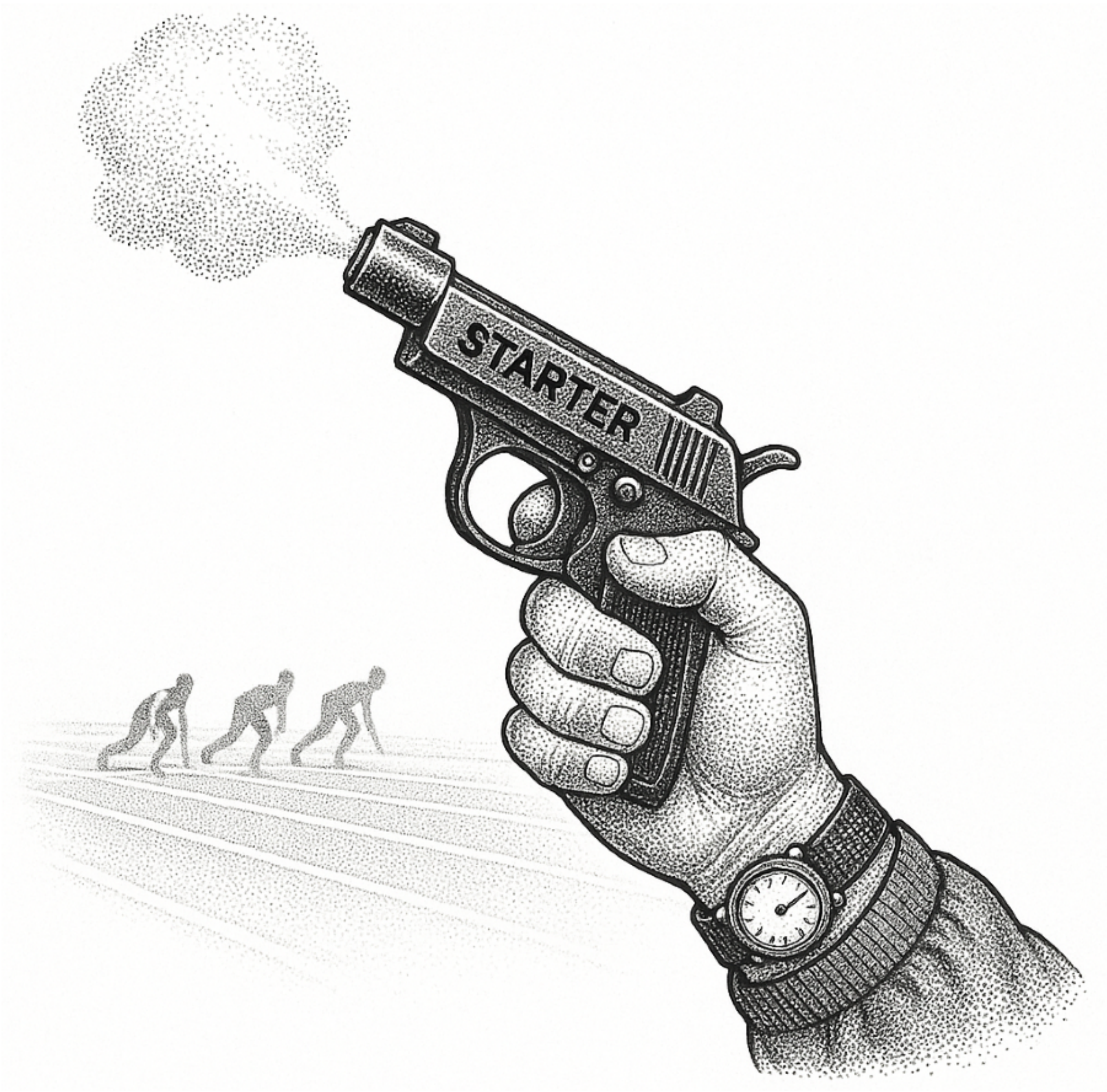
8.3 The Transition from Planning to Execution

Ideally, this structured summary is followed by a clear initial action: Who does what by when? This turns a simple recap into a statement of intent with a specific call to action – a clear and binding starting point for actual implementation.

This not only increases accountability within the team but also gives stakeholders and leadership a tangible reference point to track progress and allocate resources when necessary.

> *Engage therefore means: not just documenting insights – but making them actionable!*

Transparent communication, clear responsibilities, and a shared starting point ensure that the PURPOSE method doesn't end in a workshop, but actively leads into practice.



9. Appendix

9.1 Further Resources

Additional information on the topics:

Disruption:

https://www.forbes.com/sites/forbesfinancecouncil/2017/10/19/on-building-a-faster-horse-design-thinking-for-disruption/

Change:

https://medium.learningbyshipping.com/why-the-heck-can-t-we-change-our-product-d88533b5bc2d

MVP gone wrong (BAföG case - in German):

https://taz.de/Digitalisierung-beim-Bafoeg/!5979785/

RACI:

https://asana.com/de/resources/roles-and-responsibilities

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9.2 PURPOSE-Cheat Sheet

See next page

P – Personas

Who is the target audience?
What kind of life context, values, and needs do the users bring with them?

U – Use Cases

What do users want to accomplish?
What tasks and problems are they trying to solve?

R – Roadmap

When should What happen?
What milestones, timeframes, or external factors are relevant?

P – Prio (Prioritization)

What will be implemented – and When?
What criteria determine the focus?

O – Orga (Organization)

Who is responsible for What?
What resources, tools, and roles are needed?

S – Stakeholder

Who needs to be involved or informed?
Who has a stake in the process or outcome?

E – Engage

How do we make results actionable?
What follow-up actions do we derive – and who starts what, when?

PURPOSE Summary Statement for Communication and Workshop Results:

"Who (P) wants to do what (U)? When (R) do they need which services or outputs (P)? How (O) do we organize it – and who (S) needs to be involved?"

With a clear next step:

"What are the upcoming milestones and who is the contact person? (E)."

9.2 Copyright / Kontakt

Published November 2025.

I'm happy to discuss the contents and methods of the PURPOSE framework in more depth.

If you're interested or have questions, feel free to get in touch:

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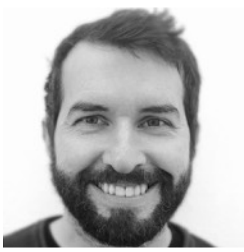
About the Author



Since studying in 2002, I have worked in various roles in product and brand communication — and, since 2007, also in product development.
For over ten years, I've been active in agile product development as a concept developer and product owner for a wide range of companies and products.

Based in Hamburg. Father of two.