5day.io

5day.io · Micro Case Study

B2B SaaS · MARKETING PLANNING

Marketing Lost Its Own Roadmap

A short study in a planning artifact that quietly stopped being true, and what it took to make the roadmap operational again for a B2B SaaS marketing team



INDUSTRY	COMPANY SIZE	MARKETING TEAM	RESULT
B2B SaaS	~200 people	6 people	Roadmap and actual work matched at every check-in, two quarters running

SECTION 01

The Problem

Coleen runs marketing at a mid-market SaaS company. Every quarter, she built a roadmap with four initiatives, agreed with leadership, presented as a slide.

It typically consisted a launch campaign, two pillar content pieces, a paid push, a partner webinar. It's a good roadmap. Nobody disputes it in at the start of the quarter.

By month 3 business review, leadership asked the question.

how's the roadmap tracking?

Coleen didn't have a clean answer. Two of the four initiatives had quietly been replaced, over several weeks, by whatever had shown up with a nearer deadline.

The roadmap wasn't wrong on the day she built it. It just stopped being the thing anyone was actually working from. The reality of marketing's day-to-day work was very different. That list and the roadmap slide drifted apart from the first week onward, with nothing forcing them to reconcile.

But the thing is, Coleen's team was working hard. They'd shipped a full quarter of work. It just wasn't reliably traceable back to the plan that was supposed to be governing it.

SECTION 02

The Diagnosis

✕ The Instinct in the Room

The instinct in the review room was to treat this as an execution problem. Leadership thought the team's not moving fast enough or not disciplined enough to stick to the plan. Both read as plausible, and both missed the real mechanism.

✓ What Was Actually Happening

The roadmap was a plan, rather than a tracking system. More like a snapshot of intent.

The actual operational reality of the team lived in a different place entirely, updated constantly, and nothing connected the two. Every time a request bumped a roadmap item, that decision happened in the operational system, invisible to the planning one.

Pushing the team to "stick to the roadmap" harder would never fix it. Roadmap was in a document that was never wired into where the work happened daily. This produced a roadmap that was incorrect with conviction.

SECTION 03

The solution

The team moved planning into 5day.io and made the roadmap the same system the work runs through.

RULE 01

The roadmap was now a board

The quarter's four initiatives lived as tracked items with owners and dates. And these were the same tracked items people are actually working from day to day. There was no separate "planning artifact" to keep in sync. If it's not reflected there, it's not the plan anymore.

RULE 02

Every deviation from the roadmap was visible

When a request bumped a roadmap item, that change was made against the roadmap itself, in view, on the date it happened. So it did not become a decision that quietly diverges and gets explained after the fact at the next business review.

SECTION 04

This is how the setup looked in 5day.io

Any project tool can hold a task list, that was never the constraint. What made this stick is that 5day.io let the roadmap function as the operating system for the work, instead of a periodic summary of it.

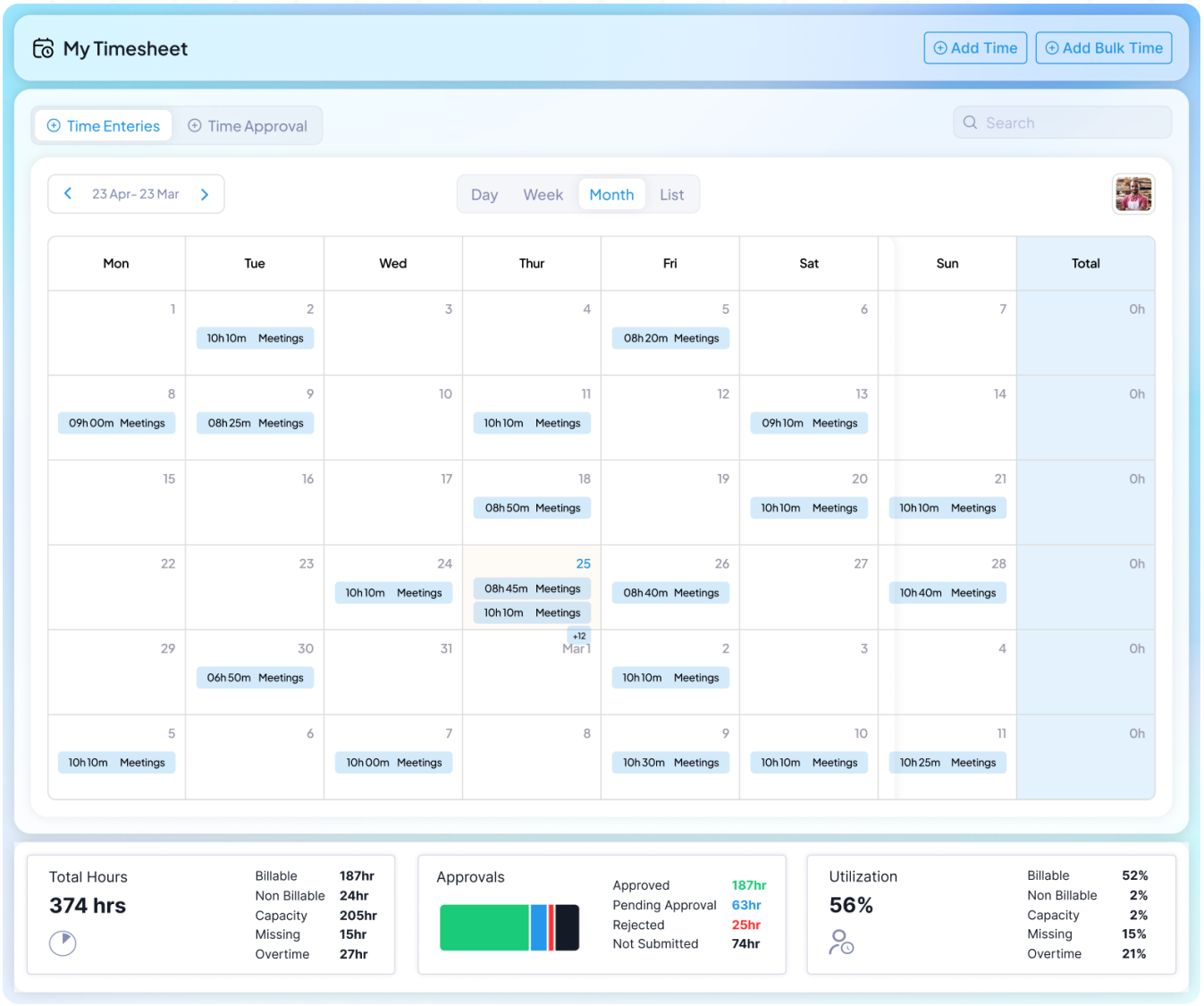
Here are four specific workflows they set up in 5day.io:

1. **A capacity view next to the roadmap**
2. **A dependency overlap when new work collided with a roadmap item**
3. **Owner reassignment to keep the roadmap intact**
4. **A change log on every roadmap item**

5day.io let the roadmap function as the operating system for the work, instead of a periodic summary of it.

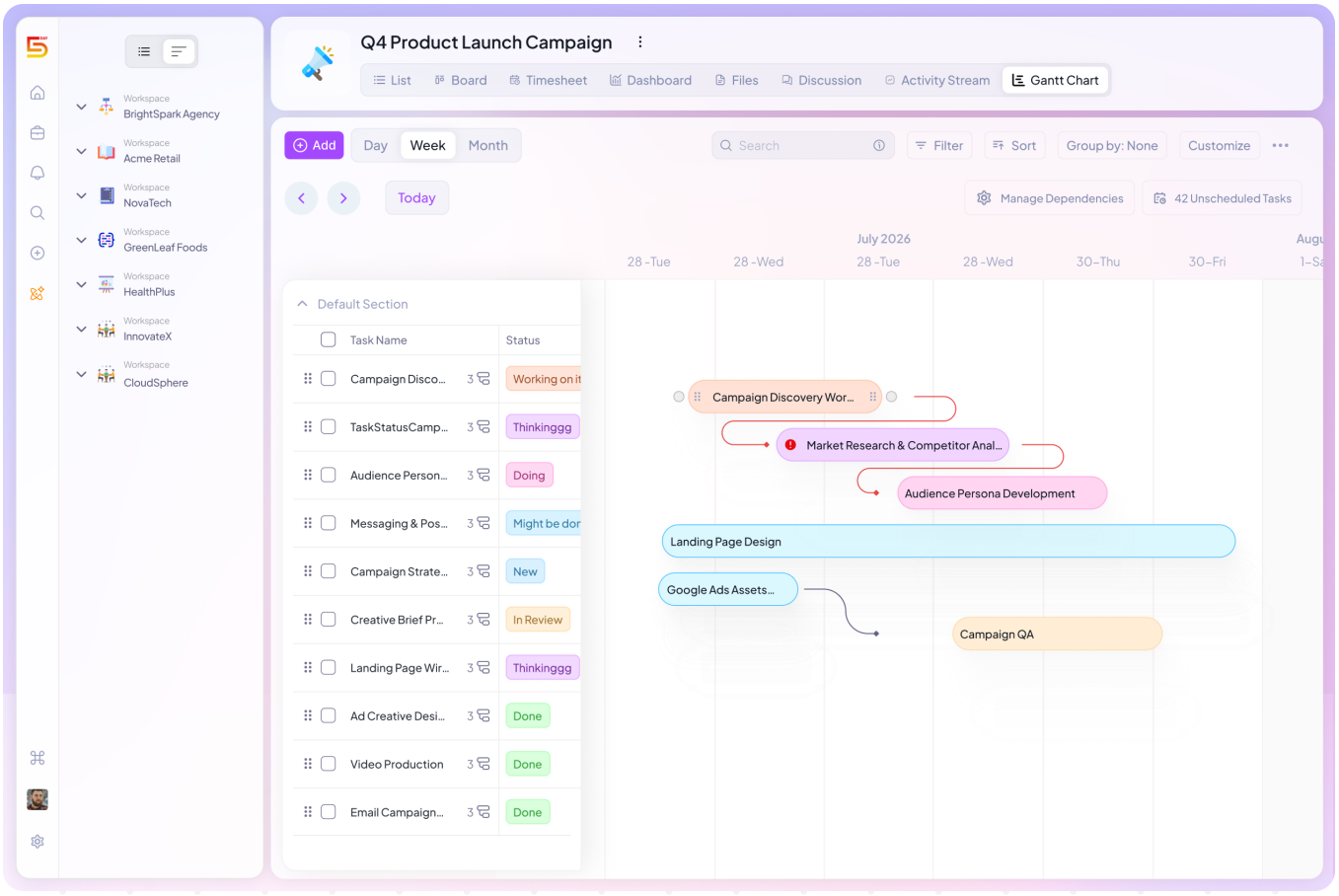
1 A capacity view next to the roadmap

Before approving a new request, the team could see what each person was already carrying against the quarter's initiatives. "Do we have room for this" was not a guess anymore. With the roadmap and the team's actual load are the same view, overcommitting by accident was no longer a norm.



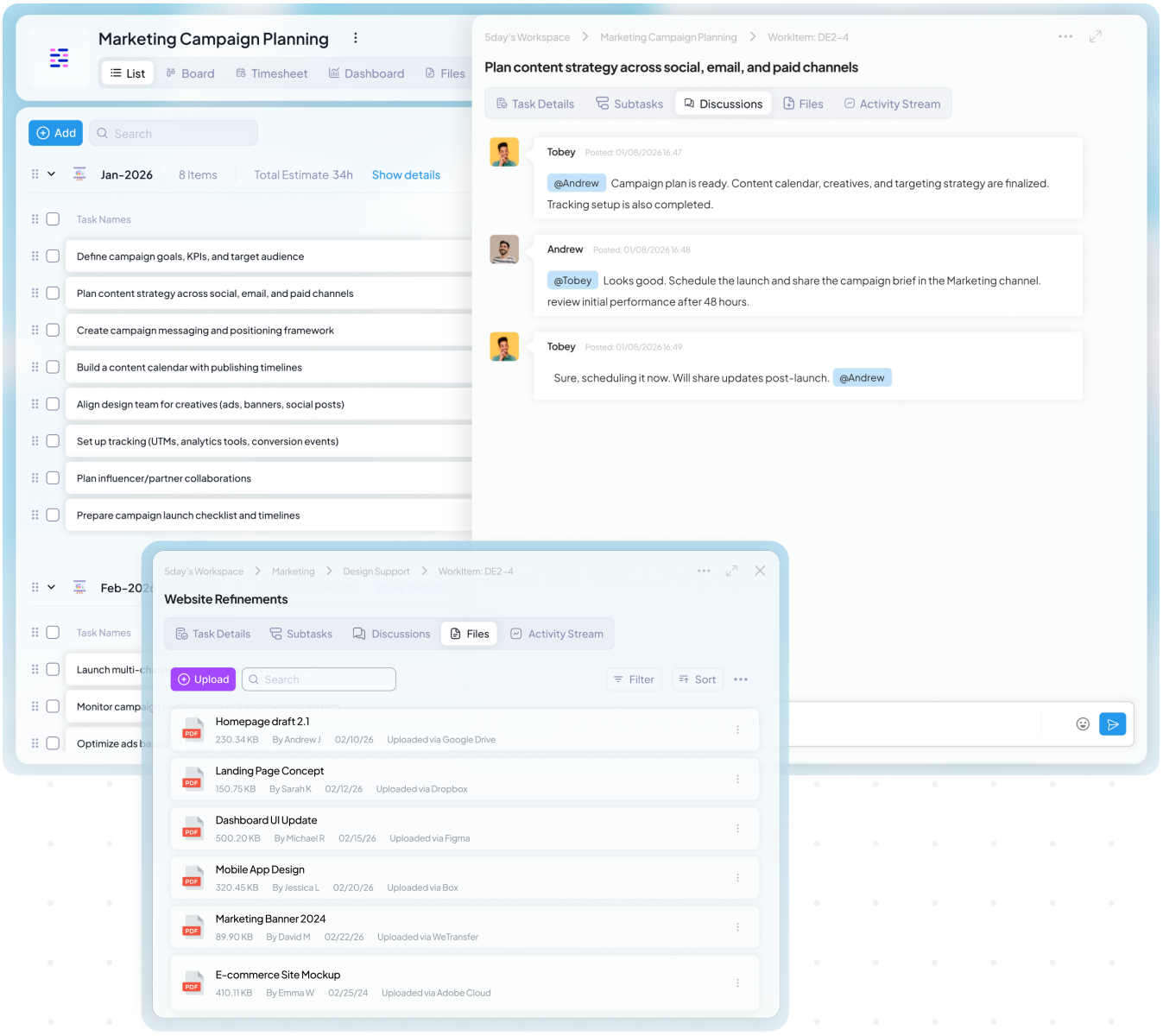
2 A dependency overlap when new work collided with a roadmap item

When an incoming request would eat time from a person or window tied to a roadmap initiative, it got flagged against that initiative before being accepted. The tradeoff always surfaced at decision time, instead of review.



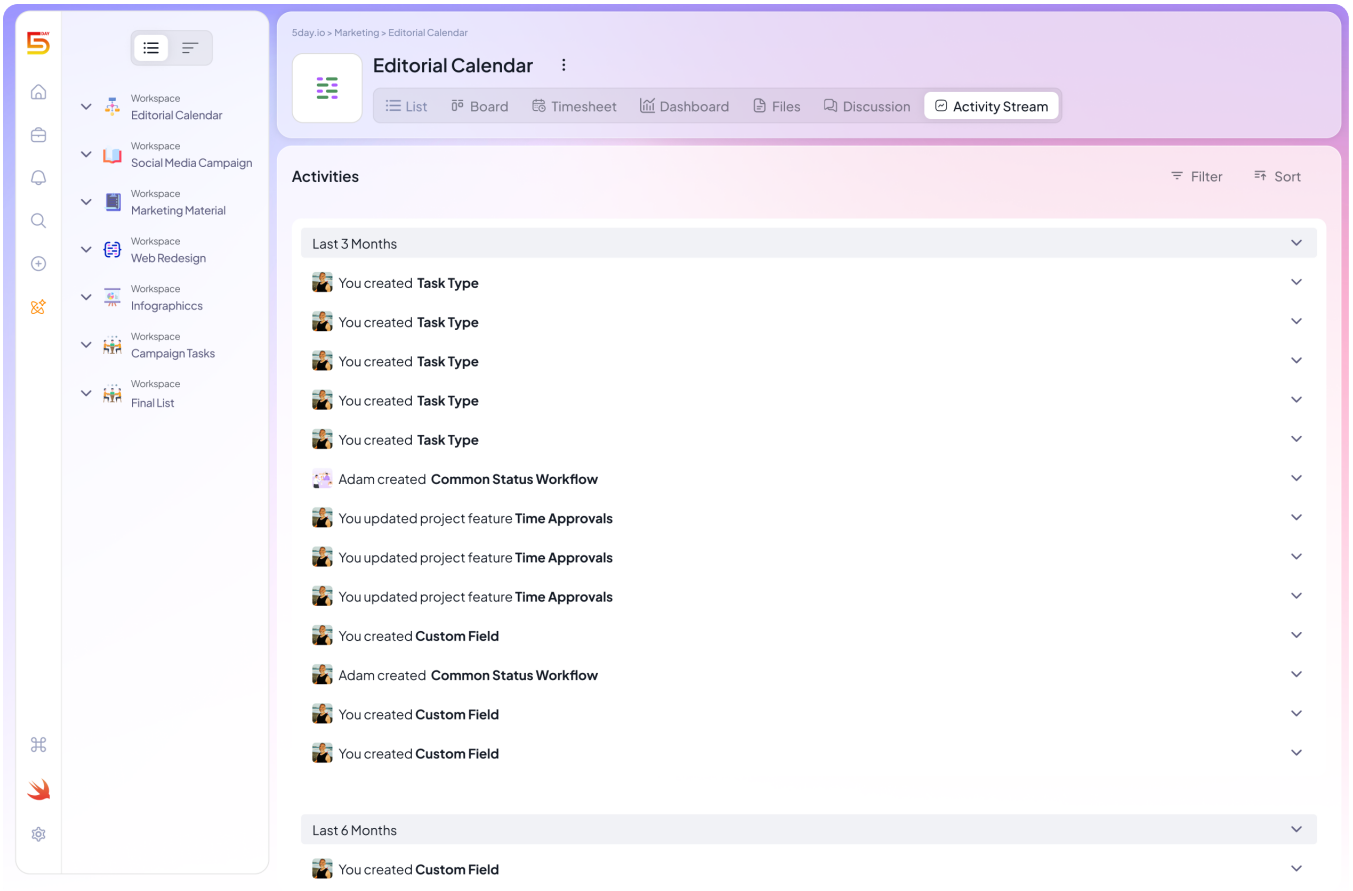
3 Owner reassignment to keep the roadmap intact

When someone left an initiative or picked it up mid-quarter, the handoff happened on the same tracked item. By simply adding them as an assignee, everything was transferred including the brief, history, discussion, and progress. This way, the initiative didn't quietly stall just because the person carrying it changed.



4 A change log on every roadmap item

Each initiative carried a visible history of what moved it and when, so every person on the new could keep up with priorities, and leadership would know how tasks kept moving throughout.



SECTION 05

The impact after implementing 5day.io

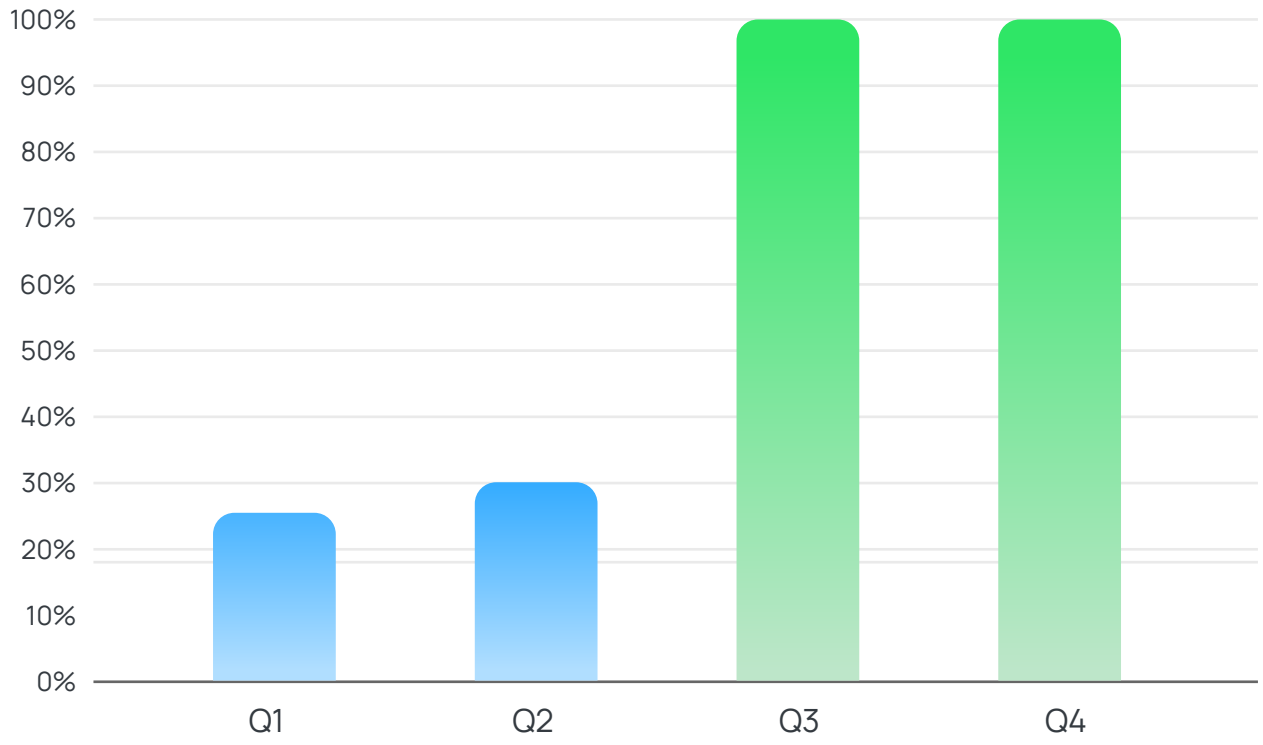
Planned
initiatives shipped on time

30% → 100%
Avg. launch delay

5.5 weeks → 0 weeks
Ad hoc requests

Untracked → 100%
Logged

This story is a composite drawn from patterns we see across marketing teams using 5day.io. Names, details, and figures are illustrative.



SECTION 06

What changed after implementing 5day.io and what didn't

Two quarters in: the roadmap presented at each business review matched what the team had been doing, item for item. It's worth being precise about what that means. Priorities still shifted constantly, and initiatives still sometimes got bumped. What changed is that every bump now happens on the roadmap, the plan stays true instead of quietly becoming fiction.

The "why doesn't marketing stick to the plan" conversation didn't come up again as there was no gap left between the plan and the record of what happened to it.

If the roadmap isn't where the work happens, it isn't a roadmap, it's a forecast. 5day.io keeps the plan and the work on the same system, so a shift in priorities updates the roadmap instead of quietly replacing it.

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