

How Toast elevates roadmapping and collaboration with Jira Product Discovery

Explore how a growing restaurant platform serves over 130,000 restaurants and expands, revolutionizing product roadmaps with modern change enablement strategies.



Running a restaurant today is no easy feat. But fortunately, with the help of Toast, some of your favorite eateries can keep their doors open in the midst of small margins and rising costs.

Toast offers an all-in-one platform “built for restaurants by restaurant people.” They provide SaaS and fintech solutions such as point of sale (POS), online ordering, team management, payments, and more to help over 130,000 restaurants run and grow their businesses with zero downtime.

To achieve this, Toast requires a massive R&D organization to help its growing number of users at scale. With nearly 150 product teams composed of managers, engineers, and designers who need to work cross-functionally with business, financial, and technical teams, “lockstep is critical.”

Introducing Toast's Product Operations team

Toast's Product Operations team supports all of Toast's product teams to build in a scalable and efficient way. Led by Director of Product Operations, Julia Klein, the team runs sophisticated workflows in Jira to manage the ever-growing demands across product teams.

The core principles of Toast's Product Operations team:



Serve product teams first



Drive plans using insights



Foster cross-functionality with product teams



Don't ask for work unless there are tools to make it easier



Test, learn, iterate



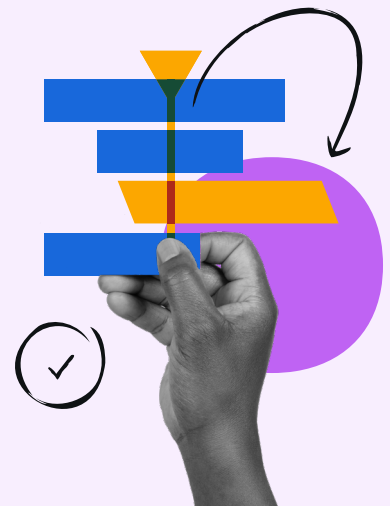
Show your work

Julie Klein
DIRECTOR OF PRODUCT
OPERATIONS, TOAST

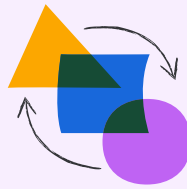
Building consistency with product roadmaps

In 2024, Klein and team conducted a retrospective of their product development lifecycle with the goal of “identifying areas we could focus on that would have the highest leverage on the organization. Where we can make the biggest impact for not only our product teams, but also our cross-functional partners.”

The first place the team chose to go deep was roadmaps. According to Klein, product roadmaps were “at the root of so many of our collaboration and communication challenges. When teams don't have a reliable way to know what's coming, everything else just gets harder.”



Toast's mechanism development cycle for product roadmaps



1. Validate problem
2. Validate solution
3. Validate scale (then launch and enable)

First, they start with a challenge or opportunity, then do research and find pain points for their customers. Then, they develop a set of hypotheses before planning how they will conduct testing to validate their solutions at a small scale to gain a foundation of confidence. From there, they scale up, go to launch, and figure out how to drive and deepen adoption.

Klein's team kicked off their research by interviewing over 20 Product leaders and partners to streamline roadmapping and make it more transparent. They found 4 consistent challenges to solve:

1	2	3	4
Their tools and processes at the time didn't scale	Leaders and partner teams lacked visibility	Duplicative roadmap artifacts quickly became stale	Product Managers wanted more structure and consistency

After gathering these insights from their stakeholders, Klein and team hypothesized 3 steps to building stronger product roadmaps:

Hypothesis #1: Quarterly roadmap reviews will establish a regular planning heartbeat

Hypothesis #2: Product teams will adopt Jira Product Discovery to create a single source of truth for all roadmaps

Hypothesis #3: Connecting Jira Product Discovery into planning and communication rituals will build stickiness and drive adoption

Quarterly roadmap reviews

Klein and team started these roadmap reviews by testing them at the product line level through 30-minute sessions across 20 product lines with their senior R&D leadership. After nearly 3 days in a row of meetings, each product leader walked through their high-level plans.

Their initial focus was on “breadth, not depth” to give a high-level view of work happening across the organization. By focusing on goals, goal progression, and work review in a brief amount of time, Klein's team was able to have leadership highlight the most important things they believed teams were working on.



“

We wanted to introduce what we felt was a simple but repeatable mechanism for our product leaders. And we felt it was important to introduce it at the most senior levels of the organization.”

Julie Klein, Director of Product Operations, Toast

These quarterly roadmap reviews have since helped Klein’s team receive up-to-date feedback and consistently tweak their template to fit the organization’s evolving needs at scale.



Adopting a centralized product roadmap tool: Jira Product Discovery

It’s no secret that teams can feel apprehensive about adopting new tools. According to Klein, other “roadmap tools are always so complicated,” so her team was definitely more hesitant to get excited before adoption.

That’s when Klein set out to prove it was the right fit by building a “ground swell of support.” She started with a bottom-up approach: one-on-one consultations. In these consultations, she examined each respective roadmap, no matter its condition.

Klein and team then took each of the roadmaps from the array of initial tools and built them in Jira Product Discovery. This bypassed the adoption hurdle of having each stakeholder manually upload their roadmaps and gave them more bandwidth to explore Jira Product Discovery.

Defining the information architecture for Jira Product Discovery

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“

We did this for literally dozens of teams, and the feedback was clear: people really liked Jira Product Discovery. They liked it a lot, but they just needed more guidance on how to use it. That was our signal that we should keep going.”

Julie Klein, Director of Product Operations, Toast

To streamline the adoption process, Klein decided to take a step back and define the information architecture for implementing Jira Product Discovery. With nearly 150 product teams, it was important that they structured their projects within the tools in a way that was consistent and scalable.

Klein and team then set up projects at the product line level with standardized views for each respective team and locked down permissions to prevent changes: one high-level leadership view, one list view, and one sandbox section for customization. This allows leaders to scan different projects to see work with the same structure to get up to speed faster.

Klein knew it was critical to have a shared taxonomy of how teams were able to discuss work:

R&D priority for R&D alignment (example: <i>strategic priority</i>)	Problem/opportunity for business alignment (example: <i>increase x, serve y customer segment, improve z</i>)	Context: the “what” for team alignment (example: <i>idea summary, description, owner, LOE</i>)	Operational data for team alignment (example: <i>launch dates, GTM info, delivery tracking</i>)
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Enabling higher-level roadmap “rollups”

With Jira Product Discovery **roadmaps**, Klein and team were able to connect all their different projects together. According to Klein, “what would have been a very manual exercise of stitching together different team roadmaps is now possible with structured data across all our plans.”

Driving adoption

Now that Klein had proved that teams liked Jira Product Discovery and that they could use it in their workflows, that’s when she came up with a 3-part adoption plan:

- 1. Educate teams** with an enablement hub in Confluence to complement Jira Product Discovery’s documentation, plus an enablement tour consisting of a dozen dedicated sessions with product teams.
- 2. Integrate with the existing workflows:** meet people where they are with their current rituals and be mindful of the amount of change you’re driving.
- 3. Ritualize the cycle** of connecting with leadership quarterly and, in turn, updating product roadmaps across teams.

“

It’s pretty exciting. We can now create roadmaps at the line of business level and at the priority level. It’s kind of amazing, actually.”

Julie Klein, Director of Product Operations, Toast



Toast's lessons learned: building a roadmaps playbook

After successfully building a new roadmapping system across her product teams, Klein offers 5 lessons for building roadmaps with Jira Product Discovery:

1

Treat your roadmaps like a product:

Listen, test, and tweak, just like with product bets

2

Change is hard:

Scaling new processes in a large organization takes smart change management

3

Product Managers crave clear expectations:

Set the bar for what good looks like

4

Motivation matters:

Figure out what the incentives are in your organization

5

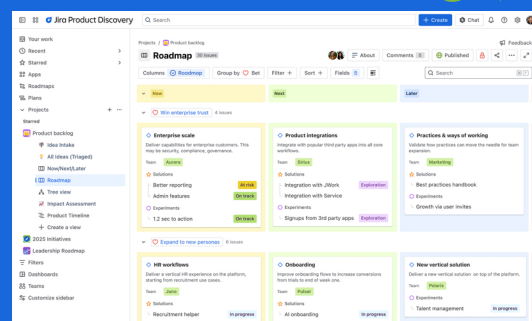
Make it stick: Build rituals that drive adoption

Jira Product Discovery: a modern solution for product teams

Jira Product Discovery is the optimal solution for product teams looking to improve ideation and planning workflows. It allows teams to capture and prioritize ideas, integrate customer feedback, and align stakeholders within a familiar Jira environment.

Try it free

The learnings in this white paper are based on a session presented at Atlassian's Team '25 conference. [You can check out this session and others on demand.](#)



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