



**THE
RDCL TOOLKIT
FOR VISION-DRIVEN PRODUCTS**

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WHAT'S INSIDE



The Vision Discovery Worksheet

4-7

A simple “fill-in-the-blanks” worksheet to try out different ways of phrasing your vision. What’s most compelling? What resonates with you and your team?



The RDCL Strategy Canvas

8-11

A cross-functional strategy generation tool to help you develop multiple approaches to achieving your vision, and understand the potential impact on your customers, as well as across your company's marketing, design, engineering, and sales functions.



The Vision/Sustainability Test

12-15

A simple 2x2 matrix to help you rapidly evaluate different potential strategic approaches based on vision fit and business sustainability.



The Implementation Roadmap

COMING SOON

16-20

A set of roadmap templates designed to help you define the concrete activities, hypotheses, and metrics to achieve your strategic goals.

HOW TO USE THE TOOLKIT

1 Develop and iterate your vision

Using the **Vision Development Worksheet**, describe your vision for your product. The Toolkit comes with three Worksheets in total, so your business partner can complete one independently. Then, together you will create one final version. If you have more than two team members, it's OK to group up for the first part

Don't worry about polishing the wording of the vision at this stage — consider this the “source code” to your vision, which can later be “compiled” by your leadership and marketing teams to target different media and audiences.

2 Explore multiple strategic options

Using the **RDCL Strategy Canvas**, get creative and explore multiple potential avenues to achieve your vision over time. What real pain points might you solve? How might the product be designed? What capabilities could your company develop to deliver on your promise? How should the product be priced and sold?

The Toolkit comes with three RDCL Strategy Canvases so you can explore multiple (potentially conflicting) strategic approaches. How will you choose between them? Read on!

3 Narrow it down to a single strategy

Using one **Vision/Sustainability Test** page for each RDCL Strategy Canvas you filled out, transfer each RDCL strategy item to a quadrant in the 2x2 matrix. Consider how well the item fits your long-term vision from the Vision Discovery Worksheet, and whether the item makes your company more or less financially sustainable.

Once you're finished, compare the 2x2s against each other and choose the strategy that represents the best balance of vision fit and sustainability for your current situation.

4 Plan for execution and measurement

COMING SOON

Now that you've defined your strategy, use the **Implementation Roadmap** templates to begin laying out a tactical plan for achieving your goals. At this stage, it is helpful to collaborate with specialists in marketing, design, engineering, and sales to get down to the details.

Think about what activities must be done, and in which order. Also think about what impact you expect to see as the result of those activities, and how you might capture relevant metrics to demonstrate that impact.

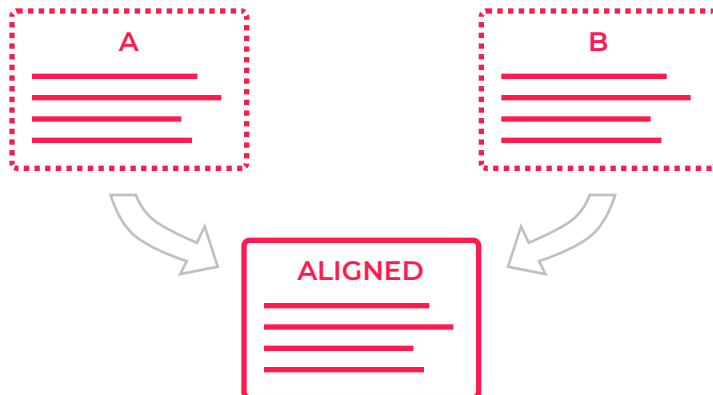


DEVELOP YOUR VISION

Section instructions

There are three **Vision Development Worksheets** in this section. The first two are meant to be completed by separate individuals or teams. When both individuals or teams have completed their own Vision Development Worksheets, compare notes and use the third Worksheet to capture a single “aligned” version of your vision to move forward with. Focus on big ideas over exact wording — you can always polish it later.

If you’re working alone, that’s OK too! Try to generate two separate versions of your vision on your own, then pick and choose the aspects of each that resonate most with you.



WHAT'S A “GOOD” VISION?

A “good” vision is not about you — it’s about the change you want to see in your corner of the world. A good vision brings your leadership, your team, and your customers into alignment. A great vision will meet all of these criteria:

It’s **PROBLEM-CENTERED**:

A good vision starts with a problem you want to see solved in the world. You should even be (a little bit) happy if someone else solves it!

It’s **SHARED BY CUSTOMERS**:

A good vision should be able to be shared between your team and your customers. “To be the world leader in...” is not a good vision, because your customers don’t care. They just want the problem to be solved!

It’s **CONCRETE**:

A good vision visualizes a concrete end state in which the problem is solved. Be as specific as you can about what that world looks like.

VISION DEVELOPMENT WORKSHEET

TEAM A

Today, when

customer segment

want to

desirable activity/outcome

they have to

current solution(s)

This is unacceptable,
because

shortcomings of current solutions

We envision a world where

shortcomings are resolved

We're bringing this
world about through

broad technology/approach

VISION DEVELOPMENT WORKSHEET

TEAM B

Today, when

customer segment

want to

desirable activity/outcome

they have to

current solution(s)

This is unacceptable,
because

shortcomings of current solutions

We envision a world where

shortcomings are resolved

We're bringing this
world about through

broad technology/approach

VISION DEVELOPMENT WORKSHEET

ALIGNED VISION

Today, when

customer segment

want to

desirable activity/outcome

they have to

current solution(s)

This is unacceptable,
because

shortcomings of current solutions

We envision a world where

shortcomings are resolved

We're bringing this
world about through

broad technology/approach



EXPLORE STRATEGIC OPTIONS

Section instructions

There are three **RDCL Strategy Canvases** in this section. Each one represents a different way for you to achieve your vision. For each Canvas, consider how you might approach each of the following aspects of your product strategy:



Real Pain Points: What validated problems will your product solve for your users or customers? Who has these problems, specifically?



Design: What will be the most important user-facing features or components of your product? What feelings will your product and brand convey?



Capabilities: How will you deliver on your user-facing product features? What technology, expertise, data, partnerships, or other capabilities must you develop?



Logistics: How will your product get into your customers' hands? How will you support it? How will people pay? Is there a subscription or upgrade model?



Now, Next, and Later: Often, your vision will be too big to be achieved in a single step. That's a good thing! If you find yourself with too much to do, you can consider how you might spread out part of your product strategy over time. The RDCL Strategy Canvas includes "Now", "Next", and "Later" columns to capture this optional time element if it makes sense for your situation.

"VALIDATED" = VERIFIED + VALUED

It's sometimes hard to tell what counts as a "real" pain point. A pain point is "real" (and thus potentially belongs on your Canvas if:

It's VERIFIED:

The pain has been confirmed to actually exist in your target population. User observation and interviewing are key tools for pain verification.

It's VALUED:

The pain is significant enough that people in your target population are willing to give something up (such as money or time) to see it solved. Customer surveys can help indicate willingness to pay, but the gold standard is having confirmed pre-sales in hand.

RDCL STRATEGY CANVAS

STRATEGY 1

 Now

 Next

 Later



Real Pain Points
Validated problems that your product will solve



Design
Key interface features, branding, voice & tone



Capabilities
Enabling technologies, patents, data, relationships



Logistics
Pricing, delivery, installation, support

VISION ACHIEVED!

RDCL STRATEGY CANVAS

STRATEGY 2



Now



Next



Later



Real Pain Points

Validated problems that your product will solve



Design

Key interface features, branding, voice & tone



Capabilities

Enabling technologies, patents, data, relationships



Logistics

Pricing, delivery, installation, support


VISION ACHIEVED!

RDCL STRATEGY CANVAS

STRATEGY 3

 Now

 Next

 Later



Real Pain Points
Validated problems that your product will solve



Design
Key interface features, branding, voice & tone

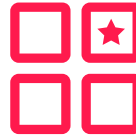


Capabilities
Enabling technologies, patents, data, relationships



Logistics
Pricing, delivery, installation, support

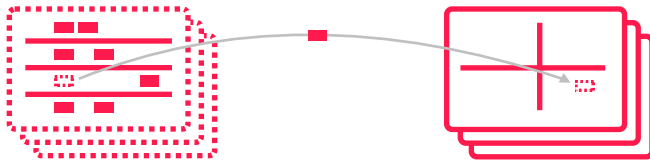
VISION ACHIEVED!



TEST AND SELECT A STRATEGY

Section instructions

There are three **Vision/Sustainability Test** sheets in this section. Each sheet is tied to one of the RDCL Strategy Canvases that you filled out in the previous step.



For each RDCL Strategy Canvas, go through each item you wrote down and move it over to the corresponding Vision/Sustainability Test sheet. Position it based on:

- ↕ **Vision Fit:** Would doing this move us closer or further from our vision? Use your final aligned Vision Discovery Worksheet from Step 1 as a guide.
- ↔ **Sustainability:** Would doing this help drive revenues up and/or push our costs down? Does this get us closer to financial sustainability?

Once you have completed this exercise for each RDCL Strategy Canvas, have a conversation with your team to determine which strategy is most appropriate for your current situation. Is it time to invest in the vision? Do you need to accumulate some “vision debt” to get through the next few quarters?

Remember, you should use this exercise to start conversations with your team, not end them!

VISION DEBT

The concept of “vision debt” is similar to the idea of “technical debt” in engineering — you hack together a quick solution that solves the problem at hand, but contributes to a shaky foundation. Too much technical debt, and your product becomes unreliable. Too much vision debt, and your product becomes directionless.

Good engineers keep track of their technical debt, only incurring it when necessary and paying it down over time. Do the same with your vision debt. You may have moments where you need to move further from your vision in order to achieve an intermediate goal. This is fine, as long as you take note of the fact that you’re accumulating vision debt, communicate it to your team, and make a plan to pay it back.

VISION/SUSTAINABILITY TEST

STRATEGY 1

Investing in the Vision

Good vision fit, but unsustainable. Lots of items in this quadrant may mean you need to raise funding if you don't have the cash on hand.

Home Run

Good vision fit and sustainable. If you're lucky enough to have lots of items in this quadrant, you've probably found a winning strategy.

Danger Zone!

Poor vision fit and unsustainable. Only accept items in this quadrant if they unlock valuable opportunities in the future.

Building Vision Debt

Poor vision fit, but sustainable. Items in this quadrant represent vision debt that will eventually have to be paid back.

VISION/SUSTAINABILITY TEST

STRATEGY 2

Investing in the Vision

Good vision fit, but unsustainable. Lots of items in this quadrant may mean you need to raise funding if you don't have the cash on hand.

Home Run

Good vision fit and sustainable. If you're lucky enough to have lots of items in this quadrant, you've probably found a winning strategy.

Danger Zone!

Poor vision fit and unsustainable. Only accept items in this quadrant if they unlock valuable opportunities in the future.

Building Vision Debt

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VISION/SUSTAINABILITY TEST

STRATEGY 3

Investing in the Vision

Good vision fit, but unsustainable. Lots of items in this quadrant may mean you need to raise funding if you don't have the cash on hand.

Home Run

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PLAN FOR IMPLEMENTATION

This section coming soon!