THE
RDCL TOOLKIT
FOR VISION-DRIVEN PRODUCTS

v3.0.0
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WHAT'S INSIDE

The Vision Worksheet

Use once every several years (or less)

Define your product vision using a simple "fill-in-the-blanks" worksheet. You'll learn what makes a good vision, and lay the groundwork for your product strategy.

The RDCL Strategy Canvas

Use every 6-12 months

Build out your cross-functional product strategy by evaluating key risk factors and defining your "RDCL": Real Pain Points, Design, Capabilities, and Logistics. You'll learn how to evaluate trade-offs between vision fit and business sustainability, and come up with a strategy to achieve your vision.

The Strategic Roadmap

Use and update every 3-6 months (or more)

Visualize your strategic milestones across time, and assign them to initiatives centered around the right teams and individuals. This isn't your standard product roadmap — it can also include sales, marketing, customer support, and other teams to ensure alignment across all contributors.

The Execution & Measurement Model

Use and update every month (or more)

Finally, collaborate with your managers and functional area team leaders to break down your strategic goals into concrete activities and measurable outcomes. Each metric is tied to a specific hypothesis of change — no hand-waving allowed! This results in a detailed execution plan, guiding your team toward achieving the vision and building a truly radical product.

DEFINE YOUR VISION

DEFINE YOUR VISION

INSTRUCTIONS

There are three **Vision 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.
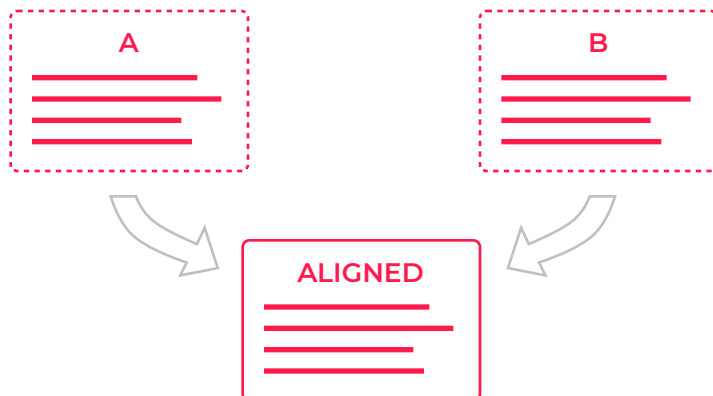
WHAT'S A "GOOD" VISION?

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 WORKSHEET

TEAM A

Today, when _____
customer/user 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

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VISION WORKSHEET

TEAM B

Today, when

customer/user 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 WORKSHEET

ALIGNED VISION

Today, when _____

customer/user 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

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PART 2

DEVELOP YOUR STRATEGY

DEVELOP YOUR STRATEGY

SECTION CONTENTS

SUSTAINABILITY ANALYSIS

Perform a high-level **Sustainability Analysis**, surveying your most significant product risks and coming up with a "Sustainability Statement".

RDCL STRATEGY CANVAS

Generate multiple strategic options using the **RDCL Strategy Canvas**, covering a wide range of potential ways forward for your product

VISION/SUSTAINABILITY TEST

Evaluate the potential impact of each strategy using the **Vision/ Sustainability Test**, and pick one strategy to pursue.

When you are finished with this section, you should have decided upon one strategy that best balances vision fit with sustainability.

If you can't find a viable strategy, you may have set yourself a vision that you cannot realistically achieve. If so, you may wish to re-evaluate your vision and try aiming at something more achievable. You can always evolve your vision in the future once your initial vision has been realized.

SUSTAINABILITY ANALYSIS

INSTRUCTIONS

Start by identifying all the risks your product currently faces on the **Risk Survey** sheet. Consider the following types of risk:

Technology Risk: The risk of failing to develop new technology or operational systems critical to your product's key value proposition.

Legal/Regulatory Risk: The risk of being shut down or prevented from operating due to legal injunction or regulatory issues.

Financial Risk: The risk of running out of liquid cash to pay employees and suppliers.

Personnel Risk: The risk that you are unable to hire or retain key personnel.

Stakeholder Risk: The risk that an influential stakeholder in your product (e.g. a sponsoring executive) decides to shut down further work.

Then, work with your team to identify the one or two greatest risk factors to your product's continued existence. Capture the details of that risk on the **Sustainability Statement** sheet, and think through what events or activities might cause your risk to increase or decrease.

WHY WORRY ABOUT SUSTAINABILITY?

In addition to having the right Vision, you also need to consider what factors influence your Sustainability as you pursue that vision, so you survive long enough to get there. Sustainability asks the pesky practical questions around "Do you have enough food and water to survive this journey? Do you have a crew? Is your boat structurally sound?"

Just like you need a common Vision for the team to follow, you need to have a common definition of Sustainability so your team is evaluating decisions the same way you are. This helps ensure that everyone is aligned with the end goal in a way that **helps you survive long enough to achieve that goal**.

SUSTAINABILITY ANALYSIS

RISK SURVEY

Technology Risk

Legal/Regulatory Risk

Financial Risk

Personnel Risk

Stakeholder Risk

SUSTAINABILITY ANALYSIS

SUSTAINABILITY STATEMENT

Currently, the greatest risk to our product's existence is that

_____

greatest risk

If this happens, we won't be able to continue operating because

_____

consequence(s) of risk

This risk will most likely come true if

_____

factors that increase/amplify risk

Some factors that could help us mitigate the risk are

_____

factors that decrease/mitigate risk

THE RDCL STRATEGY CANVAS

INSTRUCTIONS

Use the **RDCL Strategy Canvas** to guide you in identifying the "RDCL" components of your product strategy:

Real Pain Points: What validated problems will your product solve for your users or customers?

Design: What will be the most important outward-facing parts of your product? What experience and emotions will your product and brand convey?

Capabilities: How will you deliver on the promises made by your product's design? What technology, expertise, data, partnerships, or other capabilities must you develop? Ideally these should be unique and hard-to-copy.

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?

Try to create at least two or three different potential strategic approaches, with different combinations of R, D, C, and L.

Before you continue on to the Vision/Sustainability Test, do one final check to ensure that no strategy contains any internal contradictions — e.g. a "Design" element based on a "Capability" you have decided not to develop for this strategy option.

DESIGN: INTERFACE AND IDENTITY

There are two ways of looking at design: the **interface** (how the product will be used), and the **identity** (how the product will be perceived).

In the Design row of your RDCL Strategy Canvas, you should consider both your product's user-facing features (**interface**), as well as how it should look, feel, and sound (**identity**).

It's a common misconception that the identity of a product has no real impact on its underlying functionality. In fact, research indicates that by matching your product's identity to your users' desires and expectations, you can create a connection with your users that can outweigh usability problems and other functional limitations.

Plan to build both interface and identity design decisions into your product strategy from the beginning. If you don't, your product will still have an interface and an identity — they just won't be intentionally designed!

RDCL STRATEGY CANVAS

STRATEGY 1

STRATEGY

REAL PAIN POINTS
Validated problems or desires that your product addresses

LOGISTICS
Last mile and beyond (pricing, delivery, installation, support)

SUPPORT

USAGE

DESIGN
Product Interface (exposed functionality) and Identity (tone, look and feel)

DELIVERY

FEATURES

CAPABILITIES
Enabling assets (technology, content, data, relationships, expertise)

OPERATIONS

RDCL STRATEGY CANVAS

STRATEGY 2

REAL PAIN POINTS
Validated problems or desires that your product addresses

LOGISTICS
Last mile and beyond (pricing, delivery, installation, support)

SUPPORT

USAGE

DESIGN
Product Interface (exposed functionality) and Identity (tone, look and feel)

DELIVERY

FEATURES

CAPABILITIES
Enabling assets (technology, content, data, relationships, expertise)

OPERATIONS

RDCL STRATEGY CANVAS

STRATEGY 3

REAL PAIN POINTS
Validated problems or desires that your product addresses

LOGISTICS
Last mile and beyond (pricing, delivery, installation, support)

SUPPORT

USAGE

DESIGN
Product Interface (exposed functionality) and Identity (tone, look and feel)

DELIVERY

FEATURES

CAPABILITIES
Enabling assets (technology, content, data, relationships, expertise)

OPERATIONS

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THE VISION/SUSTAINABILITY TEST

INSTRUCTIONS

Now that you have a **Vision**, a **Sustainability Statement**, and multiple potential **RDCL Strategy** options, it's time to evaluate which strategy you should pursue.

Take each RDCL Strategy Canvas you've generated, and evaluate each of its R, D, C, and L components based on:

Vision Fit: Would doing this move you closer to your vision, or further away?

Sustainability: Would doing this mitigate your risks identified in your Sustainability Statement, or would it amplify them?

Using a separate **Vision/Sustainability Test** sheet for each strategy, position each component of your RDCL Strategy in the appropriate quadrant. For example, a Design decision that would reduce your risk while taking you further from your vision (at least in the short term) would go in the bottom right ("Vision Debt") quadrant.

Once you're finished, you should understand the vision and sustainability impact of each potential strategy. Now for the hard part: choosing one. For this, there is no simple answer. Choose the strategy that you judge to be the best balance of risk exposure and vision fit. Gather input from across your organization, weigh your options, and make the call.

WHERE DOES EACH RDCL ITEM GO?

GOOD VISION FIT

WORSENS SUSTAINABILITY

IMPROVES SUSTAINABILITY

VISION INVESTMENT

Good vision fit, but unsustainable. Be careful! Having many items in this quadrant may mean you're exposed to excessive risk.

IDEAL

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!

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

VISION DEBT

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

POOR VISION FIT

VISION/SUSTAINABILITY TEST

STRATEGY 1

GOOD VISION FIT

INVESTING IN THE VISION

IDEAL

WORSENS SUSTAINABILITY

IMPROVES SUSTAINABILITY

DANGER!

BUILDING VISION DEBT

POOR VISION FIT

VISION/SUSTAINABILITY TEST

STRATEGY 2

STRATEGY

GOOD VISION FIT

INVESTING IN THE VISION

IDEAL

WORSENS SUSTAINABILITY

IMPROVES SUSTAINABILITY

DANGER!

BUILDING VISION DEBT

POOR VISION FIT

VISION/SUSTAINABILITY TEST

STRATEGY 3

GOOD VISION FIT

INVESTING IN THE VISION

IDEAL

WORSENS SUSTAINABILITY

IMPROVES SUSTAINABILITY

DANGER!

BUILDING VISION DEBT

POOR VISION FIT
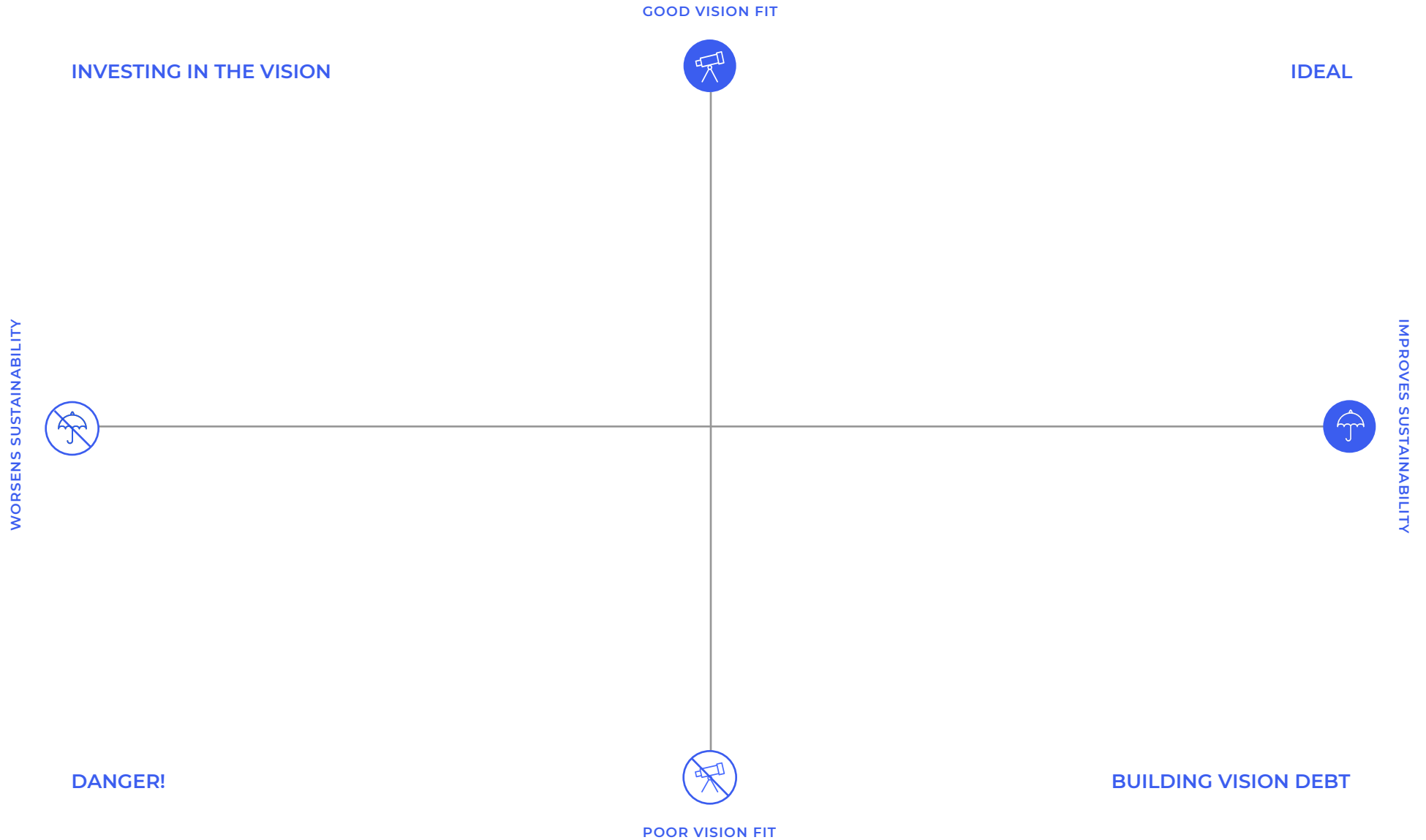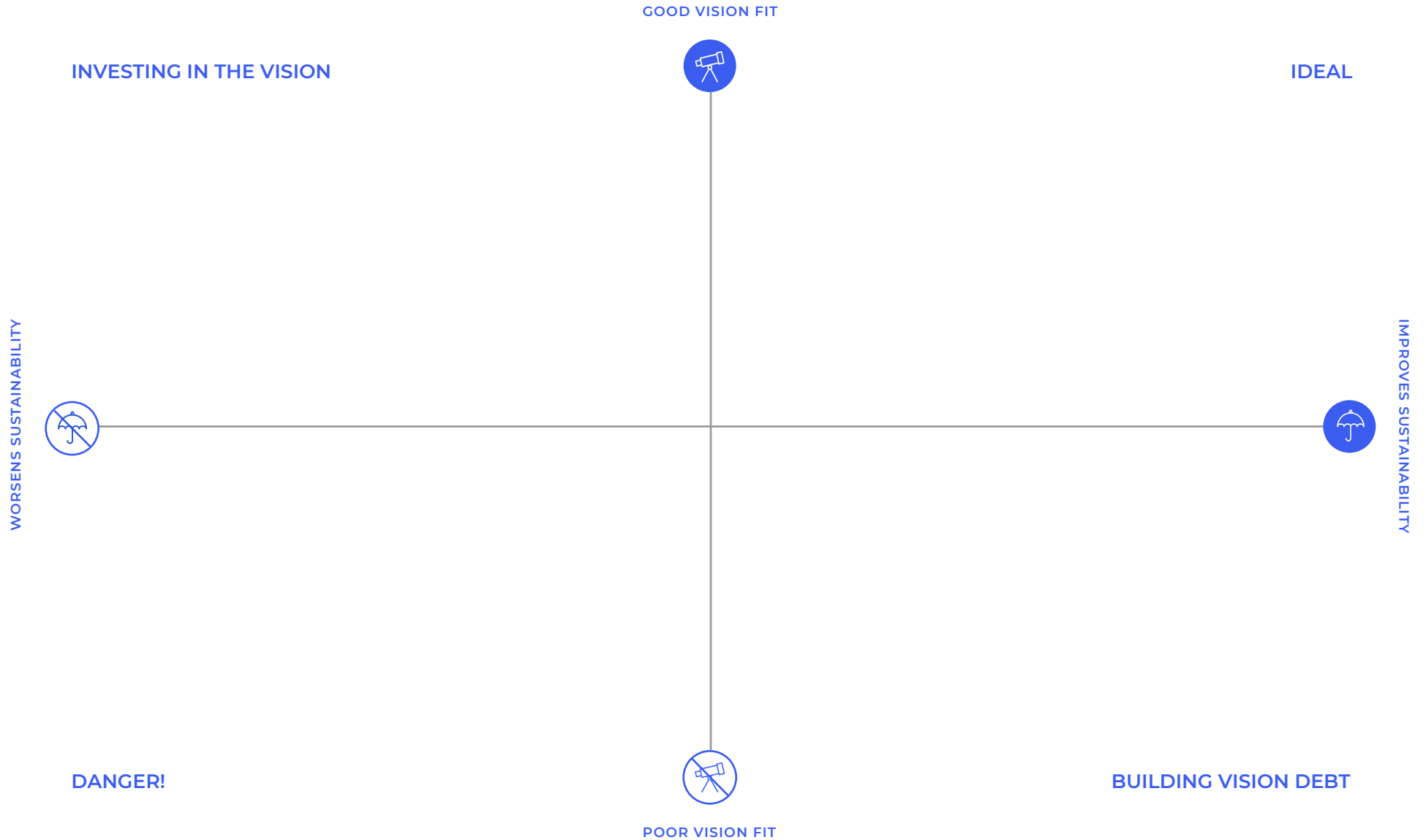
CREATE YOUR ROADMAP

CREATE YOUR ROADMAP

INSTRUCTIONS

Group together items in your chosen RDCL Strategy Canvas into **"Initiatives"** and assign them to specific responsible individuals and teams. Some examples of common Initiatives and their usual associated teams are:

Initiative	Team
Pricing Strategy	VP Marketing + CFO
Customer Outreach	Head of UX + Head of Sales
Technology Development	Engineering
Product Design	Design + Engineering
Branding	Marketing + Copywriter

Once your Initiatives have been assigned, identify key milestones for each. A milestone represents a concrete step toward achieving the Initiative as a whole. Use the past tense to help visualize the milestone as a concrete moment in time, such as: "Initial product launched to 100 pre-sales customers."

Use the **Now, Next,** and **Later** columns to capture your future milestones over the appropriate timeline. In a large enterprise with long development cycles, "Now" may represent the next several quarters. For a smaller startup, "Now" may be a matter of a few months, or even weeks.

As you evaluate your Integrated Roadmap, ensure that the timelines make sense across all Initiatives and responsible teams. This is your opportunity to align and coordinate different teams to help them execute most effectively on your RDCL strategy.

WHAT IF I'M NOT SURE WHAT MILESTONES WE SHOULD SET?

That's OK! Your Integrated Roadmap is a high-level view of the expected milestones needed to achieve your strategic goals **based on your knowledge at the time**. As you go about achieving these milestones, you are likely to learn new things, run into unexpected roadblocks, and develop a deeper understanding of the issues.

While your vision should **never** fundamentally change, and your strategy should evolve only with great deliberation, your roadmap needs to respond to changing conditions. **You should plan to revisit the Integrated Roadmap on a regular basis**.

We recommend revisiting your Integrated Roadmap once every two or three months — or even more often, if there are major uncertainties in your planned milestones.

STRATEGIC ROADMAP

INITIATIVES (FROM RDCL CANVAS)	RESPONSIBLE TEAMS & INDIVIDUALS	MILESTONES		
		Now ___ TIMELINE	Next ___ TIMELINE	Later ___ TIMELINE

EXECUTE AND MEASURE

EXECUTE AND MEASURE

INSTRUCTIONS

It's time to translate your milestones from your Integrated Roadmap into measurable **activities**, **hypotheses**, and **expected results**. This is the final step toward developing an actionable, vision-driven product plan.

First, transfer your Now, Next, and Later milestones from your Integrated Roadmap to the **Execution Model**, using one Execution Model page per Initiative in your Integrated Roadmap. Each of these Initiatives should be clearly assigned to a responsible individual or team. Then, for each set of milestones, discuss and answer the following questions:

Activities: What actions do we think this team need to take to achieve these milestones within the expected timeframe?

Hypotheses: What is the expected result of our activities? How, specifically, will these activities lead to the milestone being achieved?

Key Metrics: What can we measure to ensure that our hypothesis is correct, and that our activities are having the desired impact?

For Key Metrics, **favor leading metrics over trailing ones** — that is, try to seek measurements that will show success or failure as early as possible, so you can test your hypotheses and adjust your planned activities if necessary.

DON'T WORK IN A VACUUM!

Among all of the exercises in this Toolkit, the Execution Model is the most important to collaborate on with the rest of your team. **Do not try to complete this exercise without involving the individuals named on the top of each page**.

This is not just important for getting buy-in. You need the input of individuals with deep, domain-specific implementation knowledge to understand how certain activities will help achieve the product strategy goals, as well as to identify which leading metrics are most likely to predict success.

Congratulations! You've completed one iteration of the Radical Toolkit, and have brought your product and team closer to being truly vision-driven.

Remember to revisit each of these exercises on a periodic basis to ensure you are still on track. Recommended usage frequency for each can be found on the **What's Inside** page of this toolkit.

EXECUTION MODEL

INITIATIVE:

RESPONSIBLE TEAM / INDIVIDUAL:

| ROADMAP MILESTONES	☑— ☑— ACTIVITIES What do we need to do?	⦵ HYPOTHESES What is the expected result?	◇ KEY METRICS How will we know we are on track?
🕐 **Now** _____ TIMELINE			
📅 **Next** _____ TIMELINE			
🌅 **Later** _____ TIMELINE			

EXECUTION MODEL

INITIATIVE: _____

RESPONSIBLE TEAM / INDIVIDUAL: _____

ROADMAP MILESTONES	☑— ☑— ACTIVITIES What do we need to do?	? HYPOTHESES What is the expected result?	KEY METRICS How will we know we are on track?
🕐 Now _____ TIMELINE			
🗓 Next _____ TIMELINE			
🌅 Later _____ TIMELINE			

EXECUTION MODEL

INITIATIVE: _____

RESPONSIBLE TEAM / INDIVIDUAL: _____

ROADMAP MILESTONES	☑— ☑— ACTIVITIES What do we need to do?	? HYPOTHESES What is the expected result?	📏 KEY METRICS How will we know we are on track?
🕐 **Now** _____ TIMELINE			
📅 **Next** _____ TIMELINE			
🌅 **Later** _____ TIMELINE			