



# Guide to Creating a Customer Journey Vision

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## Context

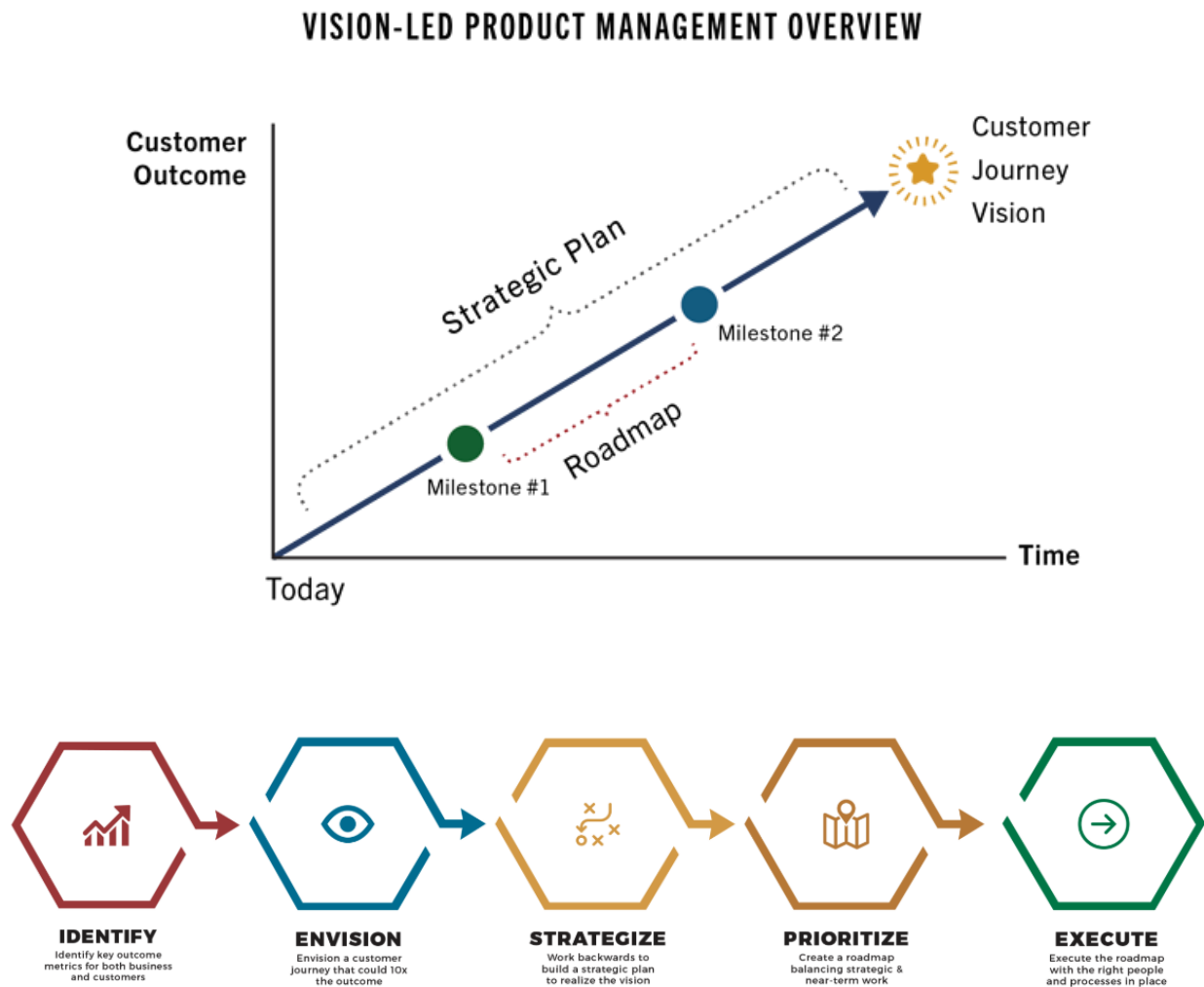
At [Prodify](#), we believe that consistently delivering meaningful outcomes requires a deep understanding of your customer's definition of success. Combine a bold customer-centric vision with a practical execution strategy, and you have a recipe that reveals product development priorities and the pathway to innovation.

We bring C-level expertise and work as product coaches/advisors, consultants and recruiters to help teams become more product-driven in order to deliver on those outcomes. Paired with our services, clients get access to the Prodify Library in an effort to help clients accelerate the time to produce product deliverables. This guide to creating a customer journey vision is one example of what is included in our library.

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# Overview



## 1. Create [Customer Outcome KPI Pyramids](#)

Use the outcome KPI pyramid worksheet to create these and copy them here.

## 2. Identify Market Trends

Use the Prodify market trends guide to document 2-3 relevant market trends that will affect your buyers / users in the next 3-5 years. Doing this will help you think

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about what your customer's world will look like in a few years so your vision meets their future needs, not just today's needs.

### 3. Determine Competitive Differentiation

[Prioritize and research competitors](#), then use [the Kano model worksheet](#) to determine a differentiation strategy. Doing this will ensure your customer journey vision includes your competitive differentiation as you explain why your customers will continue to / start using your product in the future.

### 4. Envision a 10x [Customer Journey](#)



Use the worksheet below to jot down notes and then create a draft of your comic strip using the template below. Don't forget about market trends and competitive differentiation as you craft your journey!

Notes

Chapter	Key Considerations	Envisioned Journey Notes
<b>Trigger</b>	<ul style="list-style-type: none"><li>When did she realize the current solution isn't cutting it?</li><li>How did she know it was time to look for alternatives?</li></ul>	
<b>Discovery</b>	<ul style="list-style-type: none"><li>Where did she go first to discover new products?</li></ul>	

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	<ul style="list-style-type: none"> <li>• What questions might she have as she discovers a new product?</li> </ul>	
<b>Evaluation</b>	<ul style="list-style-type: none"> <li>• What factors will she use to evaluate new products? (reference your Kano model if available)</li> <li>• What questions might she have as she evaluates a new product?</li> <li>• How will she decide if she wants to try your product?</li> </ul>	
<b>Trial</b>	<ul style="list-style-type: none"> <li>• What might stop her from trying your product?</li> <li>• How will she decide whether to keep using the product?</li> </ul>	
<b>Usage</b>	<ul style="list-style-type: none"> <li>• What triggers her to come back to your product?</li> <li>• What would get her excited enough to tell others about your product?</li> </ul>	
<b>Switching</b>	<ul style="list-style-type: none"> <li>• Why might she stop using your product?</li> <li>• What could you do to keep her as a customer?</li> </ul>	

## Helpful Hints

### Author your own customer journey

- Start by choosing a time horizon. We typically suggest 3 - 5 years. It's important to decide and align on this time horizon because what people expect 10 years from now might be drastically different than what they imagine 5 years from now.
- You can create a vision for a single product or portfolio (single is way easier)
- Be sure to cover all six chapters
  - Trigger
  - Discovery
  - Evaluation
  - Trial
  - Usage

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- o Switching
- As you think about each chapter, consider what's going through the customer or user's head and why she might keep going to the next chapter (you might even want to show some of their thinking in thought bubbles to be explicit)
- The simpler the better: bullets and stick figures work great
- It's OK if you struggle to put this down, that's the point!

### Observe yourself as you go through the process

- Take a mental note of what was challenging to author vs. what was obvious
- Ask yourself some important questions
  - o Are you sure about the problem/concern your customers are facing?
  - o Are you confident in how that translates to expectations/desires?
  - o What does your product really need to do to satisfy customers?
- Follow-up
  - o Where does your product fall short?
  - o Would others in your organization have described this differently?

### Document any assumptions you're making

- Think about these types of assumptions you're making along the way:
  - o Persona: who is our target customer / user and how sure are we they're the right group to go after?
  - o Key outcome: for each persona, what's the key outcome they seek, and how sure are we that's how **they** would express what they're trying to accomplish and why it's so urgent / important?
  - o Chapters: which chapters are you not sure about? (we find often the discovery and evaluation ones require making some assumptions)
- For each assumption, fill out a table like this to document next steps and create a customer discovery backlog

Assumption	Confidence	Next Steps

### Comic Strip Template

Trigger	Scene description _____	Scene description _____	Scene description _____
Discovery	Scene description _____	Scene description _____	Scene description _____

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<b>Evaluation</b>	<i>Scene description</i> _____	<i>Scene description</i> _____	<i>Scene description</i> _____
<b>Trial</b>	<i>Scene description</i> _____	<i>Scene description</i> _____	<i>Scene description</i> _____
<b>Usage</b>	<i>Scene description</i> _____	<i>Scene description</i> _____	<i>Scene description</i> _____
<b>Switching</b>	<i>Scene description</i> _____	<i>Scene description</i> _____	<i>Scene description</i> _____

## Mockups

For every chapter in your comic strip, sketch at least one mockup to show the screen(s) the customer interacts with in that chapter. Doing so will help bring your vision to life, especially with designers and engineers.

## 5. Work Backwards to Identify a [Strategic Plan](#)

Reference the [Prodify Guide to Strategic Product Planning](#).

## 6. [Create Roadmap](#)

Use the [roadmap template](#) to split your product development capacity between strategic progress towards the vision, near-term optimizations / feedback requests and product hygiene / technical stability. For strategic progress features, use the example tickets template to break the work up into alpha, beta and general availability releases using storymapping and by defining exit criteria for each phase.

# Chuckwagon Example

## Background

Chuckwagon is a fake company made up by Ben and Rajesh to make cooking at home more enjoyable and less stressful. The product automatically plans a weekly menu of meals for users and orders the groceries needed to make those meals with a single click. There's an optional service to have a chef come make the recipes. The

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idea came from Rajesh's own household experiences with two working parents and two young toddlers.

## Relevant Market Trends and Data

1. Consumers are switching to online grocery shopping. [In 2017, Americans spent about \\$14.2B in online grocery sales, and that number is expected to rise to \\$30B by 2021.](#) Grocery stores see this, as evidenced by recent acquisitions: [Target bought Shipt](#), and [HEB bought Favor](#). [As people stay home due to COVID, there has been a surge in grocery delivery.](#)
2. Consumers are also using meal kit delivery services more. [Revenue from these services is expected to grow to \\$10B by 2020.](#) Due to COVID, [Monthly meal-kit sales doubled through mid-April, year-over-year, at roughly \\$100 million, during which Blue Apron shares rallied 400%.](#)
3. Combined, these two trends point to the underlying problem: consumers want to spend less time preparing meals.
4. Demand for personal chefs is on the rise. [Growth is expected at higher rates than other occupations.](#)

## Stakeholder Jobs to be Done

### Consumer

Job to Be Done	Current Solution	Current Solution Weaknesses
Decide what to eat for a meal	Plan in advance (ex. every Sunday)	<ul style="list-style-type: none"><li>• Planning takes a lot of time</li><li>• Frustrating - no one knows what they want to eat 2 days later</li></ul>
	Leave it to luck (ex. AllRecipes Dinner Spinner)	<ul style="list-style-type: none"><li>• Might not have ingredients in house to make whatever comes up</li></ul>
	Use a recipe app like Tasty or Food Network	<ul style="list-style-type: none"><li>• Choice overload - so many recipes!</li></ul>
	Use a meal planning app like Mealime	<ul style="list-style-type: none"><li>• Still have to take time to choose meals</li></ul>

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	See what's possible based on what's in the fridge	<ul style="list-style-type: none"> <li>• Sometimes the possibilities are really limited</li> <li>• Even worse, sometimes there are NO possibilities</li> </ul>
	Use meal kit delivery service (ex. Blue Apron)	<ul style="list-style-type: none"> <li>• Limited choices</li> <li>• Expensive</li> <li>• Not always great for kids</li> </ul>
	Give up - eat out	<ul style="list-style-type: none"> <li>• Expensive</li> </ul>
Make a grocery list	Pen and paper	<ul style="list-style-type: none"> <li>• Hard for spouse to add things once you've left the house for store</li> <li>• Not great for the environment</li> <li>• Inventory nightmare: what do I already have?</li> </ul>
	Use an app like <a href="#">PlanToEat</a>	<ul style="list-style-type: none"> <li>• Not always integrated with meal planning (except Mealime)</li> <li>• Inventory nightmare: what do I already have?</li> </ul>
	All in my head	<ul style="list-style-type: none"> <li>• Easy to forget something</li> <li>• Inventory nightmare: what do I already have?</li> </ul>
Buy groceries	Go to the store	<ul style="list-style-type: none"> <li>• Takes too long</li> <li>• Store is crowded (ex. no room for my cart!)</li> </ul>
	Use curbside pickup	<ul style="list-style-type: none"> <li>• Takes time to order online/through app</li> </ul>
	Use grocery delivery service like Instacart	<ul style="list-style-type: none"> <li>• Sometimes they can't find what you ordered (or claim it's unavailable), meaning</li> </ul>

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		<p>you still have to go to the store if it's urgent</p> <ul style="list-style-type: none"> <li>• Expensive</li> </ul>
Cook meal	Do it myself	<ul style="list-style-type: none"> <li>• Monotonous - feels like I'm always in the kitchen</li> <li>• Stressful - everyone's hungry / limited time window to do this</li> <li>• Time consuming</li> <li>• Food doesn't always turn out that great (over/under cooked, etc)</li> </ul>
	Buy pre-made meals and warm them up (ex. Snap Kitchen or HEB pre-made raw meals)	<ul style="list-style-type: none"> <li>• Food doesn't always look/taste that fresh</li> </ul>
	Hire a personal chef	<ul style="list-style-type: none"> <li>• Hard to find one</li> <li>• Expensive</li> </ul>
	Give up - order takeout	<ul style="list-style-type: none"> <li>• Still have to decide what to get</li> </ul>
	Give up - eat out	<ul style="list-style-type: none"> <li>• Still have to decide where to go</li> <li>• Long waits at some places</li> <li>• Expensive</li> </ul>

## Grocery Store Exec

Job to Be Done	Current Solution	Current Solution Weaknesses
Grow revenue	Advertise more	<ul style="list-style-type: none"> <li>• Hard to track ROI</li> </ul>
	Use larger carts	<ul style="list-style-type: none"> <li>• Hard to switch carts out across all stores</li> </ul>
	Use loss leaders	<ul style="list-style-type: none"> <li>• Cut into margins</li> </ul>
	Offer free in-store samples	<ul style="list-style-type: none"> <li>• Expensive</li> <li>• Health code concerns</li> <li>• Operational</li> </ul>

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		complexity - scheduling, setting up, etc.
Cut costs	Consolidate retail locations	<ul style="list-style-type: none"> <li>May lose unloyal customers</li> </ul>

## Instacart Exec

Job to Be Done	Current Solution	Current Solution Weaknesses
Grow revenue	Direct mail	<ul style="list-style-type: none"> <li>Expensive</li> <li>Hard to track read rates</li> </ul>
	Referral bonuses	<ul style="list-style-type: none"> <li>Only so many friends and family people can refer</li> </ul>
	Bigger order sizes	<ul style="list-style-type: none"> <li>Hard to know what else to try to sell users</li> </ul>
Cut costs	Fewer staff in stores	<ul style="list-style-type: none"> <li>Hard to optimize given geographic distribution of user base</li> </ul>

## Recipe Creators

Job to Be Done	Current Solution	Current Solution Weaknesses
Make money from recipes	Sell ads	<ul style="list-style-type: none"> <li>Limited exposure - still need people to download the app</li> </ul>
	<a href="#">Chicory</a>	<ul style="list-style-type: none"> <li>Limited reach: only works with certain recipe sites</li> </ul>

## Personal Chefs

Job to Be Done	Current Solution	Current Solution Weaknesses
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Get more clients	Yelp	<ul style="list-style-type: none"> <li>Initially, one bad customer review can thwart my growth</li> <li>Awkwardness of having to ask clients for payment each time</li> </ul>
	<a href="#">Hire A Chef</a>	<ul style="list-style-type: none"> <li>Limited reach</li> </ul>

## Personal Trainers

Job to Be Done	Current Solution	Current Solution Weaknesses
Get client to eat healthier	Curated recipe lists	<ul style="list-style-type: none"> <li>Hard to get clients to actually use them</li> </ul>
	<a href="#">8fit</a>	<ul style="list-style-type: none"> <li>Limited reach</li> </ul>

## Customer Experience Vision and Strategy to Achieve It

### Vision Options

Consumer Job to be Done	Solution	Option 1: Just Shop	Option 2: Just Cook	Option 3: Restaurant at Home
Decide what to eat	Auto-populate weekly meal menu, personalize over time using machine learning and meal ratings	✓	✓	✓
Make a grocery list	Auto-populate a grocery list based on weekly menu, and tailored based on existing ingredients on hand from previously-made meals		✓	✓
Buy groceries	Integrate with all grocery delivery services and offer a discount that comes with bulk pricing negotiated with partners		✓	✓

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Cook meal	Send a personal chef to customer's house to cook a meal and prepare future meals to be warmed up easily			✓
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## Recommended Option: Just Cook with Upsell to Restaurant at Home

### Customers' Success KPIs

Consumers will measure success based on a few main factors:

1. Time saved in planning / preparing meals compared to current solution(s)
2. Household satisfaction with meal planning, preparation and taste
3. How stressed they feel about meal planning and preparation

### Rationale

Just Shop isn't differentiated enough - there are lots of meal planning solutions out there. Just Cook is unique because there aren't any products that integrate the meal planning with grocery delivery services yet. See the table below for competitive positioning using the [Kano model](#), which helps categorize features as must-haves, performance factors, and delighters.

Category	Feature	Chuckwago n	Instacar t	Tasty
Must Have	Great recipes	✓	✓	✓
	Grocery delivery	✓	✓	
Performan ce	Time needed to plan meals	Low	Mediu m	High
	Time needed to get groceries	Low	Low	High
	Variety of recipes	✓		✓
Delighter	In home chef	✓		
	Collaborative menu planning	✓		

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## Risks

An existing product like [Mealime](#) partners with a grocery delivery service like Instacart and beats us to it. Or Instacart adds a meal planning feature to their product.

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## Customer Journey Vision

### Visual

### Polished



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Draft

<p>Trigger</p>	<p>Sharon sits down to plan weekly family meals.</p> 	<p>She looks through cookbooks.</p> 	<p>And on Pinterest. She's upset it's taking so much time.</p> 
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Discovery	<p>She seeks a link on Pinterest for a meal-planning app.</p> <hr/> 	<p>She reads how another mom meal plans in 10 minutes.</p> <hr/> 	<p>She's thinks about getting back all that free time!</p> <hr/> 
Evaluation	<p>Sharon visits the Chuckwagon site.</p> <hr/> 	<p>She reads about the features.</p> <hr/> 	<p>Then looks at App Store reviews.</p> <hr/> 
Trial	<p>She downloads and builds household profile.</p> <hr/> 	<p>She gets a good-looking meal plan right after downloading!</p> <hr/> 	<p>She tries again next week and decides to pay for the service.</p> <hr/> 
Usage	<p>Sharon rates meals and gets better meal plans.</p> <hr/> 	<p>She tries grocery delivery and loves how much time it saves.</p> <hr/> 	<p>She tries a chef for a special meal and loved that too.</p> <hr/> 
Switching	<p>Sharon goes on vacation for 3 weeks.</p> <hr/> 	<p>Nisha from Chuckwagon emails her to see if everything's OK.</p> <hr/> 	<p>Sharon confirms it's all good and starts using app again after vacation.</p> <hr/> 

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## Story

Imagine a world where instead of spending hours meal planning and grocery shopping you instead get a personalized weekly meal plan and the groceries needed to make those meals delivered to your front door. Let's look at an example of what life would be like.

Meet Ryan. He's a startup product guy who's worked at a few startups and is now advising startups full time. Ryan has two young kids and recently moved back to Austin, at which point he and his wife bought their first house ever.

Ryan's wife, Sharon, does most of the cooking in the house but it's stressful and time consuming. Every Sunday morning, she spends an hour or two thumbing through cookbooks and Pinterest to plan what meals to make for the upcoming week. She then makes a grocery list for those meals, goes to the grocery store (usually with one kid) and then spends 2-3 hours on Sunday afternoon prepping for the meals for the week (cutting vegetables, making marinades, etc). Then, every weekday between 5 and 6 pm, she cooks dinner after working from 8-5. And oh by the way, she wakes up at 6:00 every morning to make the kids breakfast and pack their lunches for school. It's a lot on her shoulders, and she feels it.

One Sunday morning, Sharon is **not** feeling up to the task of planning this week's meals or grocery shopping. She Googles "meal planning apps" and sees a mommy blog article whose headline reads "How I Meal Plan and Grocery Shop for the Week in 10 Minutes." She taps it and reads about how a new app called Chuckwagon automatically creates a weekly meal menu for the author based on her family's food preferences, and with a single click, she can have the groceries delivered to make those meals. Sharon is intrigued, so checks out the Chuckwagon app in the App Store, sees 100 5-star reviews, some amazing videos and screenshots and decides this must be legit. She downloads the app and opens it.

She starts using the app by building a profile of the people in her house - herself, Ryan, Dominic and Ella. For each person, she can specify his/her age and any food preferences/allergies, and when she's done, she taps on the "Plan My Meals" button and is amazed: 3 seconds later, she sees a calendar for the next week, and each day has the picture and title of what looks like a delicious dinner and a rating next to each meal. On each meal, she sees an option to replace it with something else and taps on one of them to see what it does. She's prompted with a question on why she wanted to replace the meal. She sees a few options like "didn't look good", "didn't sound good", "don't like an ingredient" and taps on one to see what it does. Instantly

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a new meal is chosen for that day, and the app notes that her preferences will be used to make better choices for future meals. At the bottom, she sees a button to order the groceries needed for this week's meals via Instacart (with a 20% off coupon too!) and the option to share the calendar of meals with someone. She shares it with Ryan via text to see what he thinks about the menu.

Ryan sees a text saying Sharon shared this week's dinner menu with him via Chuckwagon and taps on it to look at the menu. He notices there's a lot of meat dishes and taps on a button to switch the meal out. He chooses "prefer vegetarian" as the reason why he wants to switch the meal out and instantly sees that night's meal replaced with Garden Veggie Lasagna, one of his favorites. He texts Sharon back telling him what he did and that the menu looks awesome otherwise.

Sharon gets a push notification from Chuckwagon letting her know that a meal was switched out by the person she shared her menu with and is able to see the Garden Veggie Lasagna on the menu. She's starting to get excited about all the time she's saving with Chuckwagon and begins daydreaming about taking the car to the mall by herself instead of to the grocery store. She snaps out of it and decide to order the groceries through Instacart. Before placing the order, Chuckwagon asks if there are any "staples" like milk, juice, cheese, bread, and fruit that she'd like to add to the order. Sharon picks a few of them and is notified that they'll be automatically added to future orders but she can always remove one if she doesn't need it.

A couple hours later, the groceries are delivered and Chuckwagon sends a push notification to both Sharon asking if everything looked good with the groceries. Sharon responds after putting the groceries away and notes that everything looked good.

On Monday evening, Sharon pulls out her iPhone at 5:15 and looks at the recipe in Chuckwagon for that night: chicken parmesan with grilled veggies. She makes the meal in about 20 minutes, and it's a hit! Later that night, Chuckwagon emails Sharon to rate the meal, asking about things like the ingredients, taste, prep time, and cook time. The survey even asks whether each person in the household ate the meal, and what (if anything) they didn't seem to like. She didn't get to ask Ryan about his opinion after dinner but sees a message next to Ryan's name in the survey to forward the survey to him. She taps it, enters his email in the browser window and hits Send so that he can rate the meal himself.

The first week with Chuckwagon is pretty solid - there's one meal both Sharon and Ryan didn't like, and they each rate it so that night when they get the rating email from Chuckwagon (Sharon no longer sees Ryan's name in the survey she gets because Chuckwagon is emailing him directly). The next Saturday, Chuckwagon sends a push notification and asks if Sharon would like to see his pre-made menu for

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the upcoming week. She taps to open the app, scrolls through the menu and likes what she sees. She walks over to Ryan to see if he has any edits and then orders the groceries again. This time there's no 20% off Instacart but she doesn't mind because it's so convenient to not have to make a grocery list or go to the store.

A few weeks go by, and then Chuckwagon sends Ryan and Sharon an email asking if they'd like to add breakfast to their menus. They show some 10-minute meals that can be created that look awesome, so the next week, they try breakfasts and like the additional service.

Before Ryan's next birthday, Chuckwagon sends Sharon an email and asks if he'd be interested in getting a personal chef as a birthday gift for him for a week for \$100. She loves the idea because they've always dreamed of having a personal chef and taps on the link to pick a chef in Austin. She scrolls through a list of 3, each with ratings and pictures of their favorite dishes and chooses Emma, who mentioned she knows how to cook Indian food. Emma, who works at a local catering company, signed up for Chuckwagon when her manager told her about it because he knew she was looking to do more private parties to pay back her student loans faster. That Sunday afternoon, Emma shows up shortly after their weekly groceries are delivered and makes Sharon and the family a delicious dinner. While the family is eating, she also preps three more Chuckwagon meals and puts them in casserole dishes in the fridge with a Post It on each for how to warm them up in the oven. Sharon loves her week off from cooking, and Ryan enjoys his birthday gift all week.

The next weekend, Ryan and Sharon are talking one night about Emma's food and decide to try Emma again the upcoming week. Ryan finds the card she left behind, emails her and books her for \$150 for that Sunday. He pays using the same credit card Sharon had initially entered into the Chuckwagon app. Again, they love the food and decide to use Emma every week going forward.

One Sunday night, Ryan's sister and her family come over for dinner. Sharon was able to edit the portion size for that meal through Chuckwagon and let Emma know about Ryan's sister joining. She makes a delicious meal that everyone loved and at the end of the night, Sharon gets an email from Chuckwagon asking whether her guests enjoyed the meal. The email also offers her and a friend a \$40 credit each for referrals. She forwards the email to her sister-in-law, who ends up downloading the app that week and using it the following weekend to get groceries.

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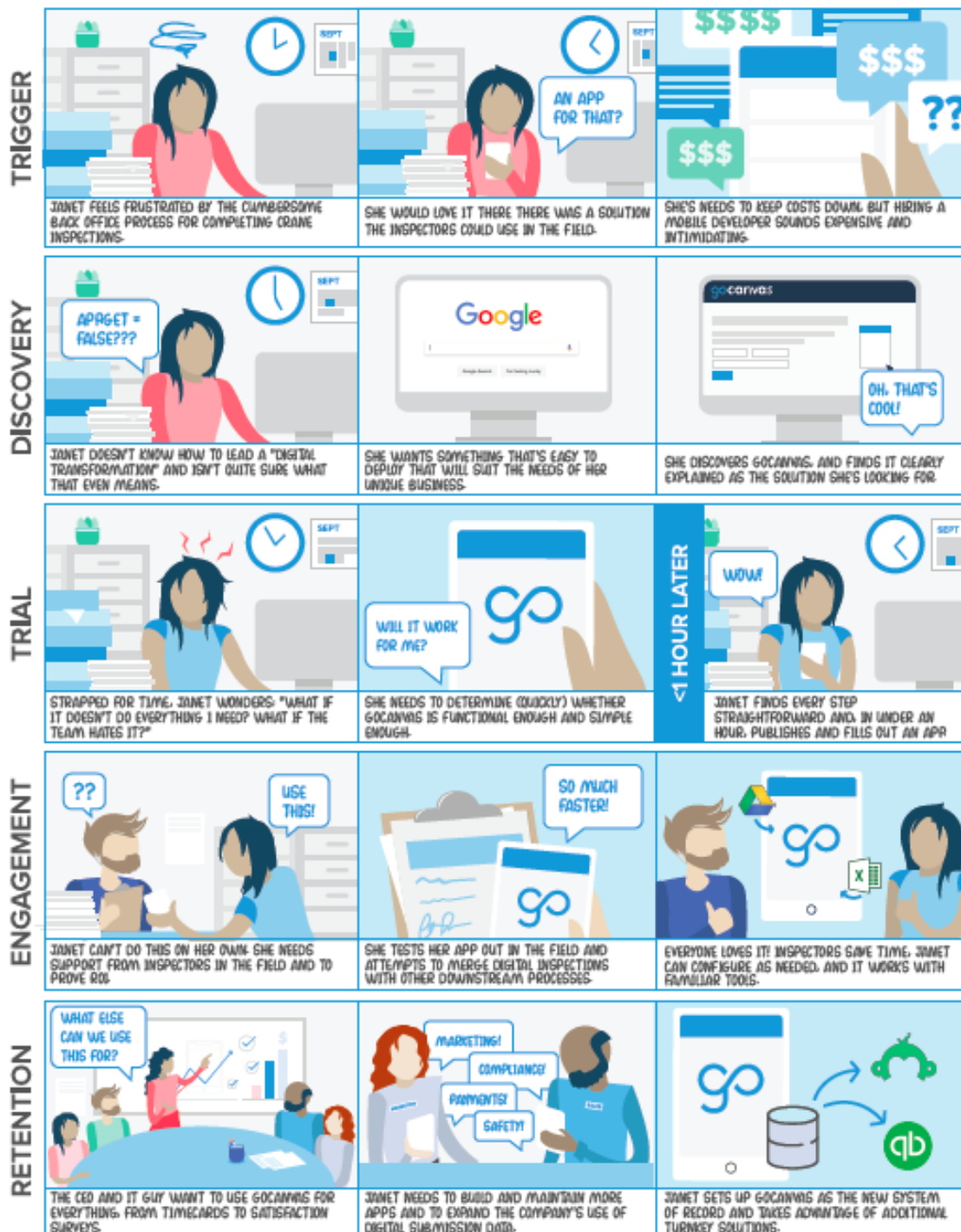
## GoCanvas Example

GoCanvas is where Ben is Chief Product Officer. Their product digitizes paper processes for small and medium sized businesses by making it easy to publish mobile apps to field workers.

Example: an electrician can give you a digital invoice when he's done with the work at your home instead of the carbon copy, which he has to take back to the office for someone to enter manually.

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# gocanvas | Vision Narrative



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Trigger		
Problem / concern	Expectation / desire	Gap / opportunity
<ul style="list-style-type: none"> <li>Shifting customer expectations</li> <li>Competitive pressure</li> <li>Laborious processes</li> </ul>	<ul style="list-style-type: none"> <li>Digital/mobile solution</li> <li>Just works, easy to deploy</li> <li>Is there an “app for that”?</li> </ul>	<ul style="list-style-type: none"> <li>No app that works out of the box</li> <li>Custom solutions too expensive</li> <li>Confused, intimidated by tech</li> </ul>
Discovery		
Problem / concern	Expectation / desire	Get / perceive
<ul style="list-style-type: none"> <li>Unsure how to digitize</li> <li>I don't know what's out there</li> <li>I have a specific use case in mind</li> </ul>	<ul style="list-style-type: none"> <li>Works for our unique business</li> <li>Can do everything it needs to</li> <li>Is simple to use, quick to deploy</li> </ul>	<ul style="list-style-type: none"> <li>GoCanvas is clearly explained early</li> <li>It can solve our business need</li> <li>I can find it online (via Google)</li> <li>I can set it up myself in &lt; 1 day</li> </ul>
Trial		
Problem / concern	Expectation / desire	Get / perceive
<ul style="list-style-type: none"> <li>I'm extremely busy, no time</li> <li>I'm not technically savvy</li> <li>Field workers might reject it</li> </ul>	<ul style="list-style-type: none"> <li>Need to confirm it will work for us before I invest too much time and money</li> <li>Simple enough for me to use</li> <li>Field workers perceive efficiency gains</li> </ul>	<ul style="list-style-type: none"> <li>Free to try, transparent pricing</li> <li>Easy to sign up, get started</li> <li>Never confused about what to do next</li> <li>I get the help I need when I need it</li> <li>I get to the “wow” moment in &lt; 1 hr, I feel “I can do this”</li> <li>More efficient than paper forms</li> </ul>
Engagement & delight		
Problem / concern	Expectation / desire	Get / perceive
<ul style="list-style-type: none"> <li>Can't rock the boat too much</li> <li>Must justify change to legacy process</li> <li>Need to get company bought in</li> <li>Need a few key “wins”</li> </ul>	<ul style="list-style-type: none"> <li>Works with the tools I already use</li> <li>Take advantage of digital workflows and mobile technology</li> <li>Clear process improvements</li> </ul>	<ul style="list-style-type: none"> <li>Turnkey integrations with familiar tools (Excel, etc.)</li> <li>Embedded mobile tech such (GPS, photos, etc.)</li> <li>Customizable rules (ex. conditional formatting, required fields, etc.)</li> <li>High reliability, low data latency, improved data accuracy, etc.</li> </ul>
Retention & evangelization		
Problem / concern	Expectation / desire	Get / perceive
<ul style="list-style-type: none"> <li>Technology must scale to address other use cases</li> <li>Need to demonstrate high ROI</li> <li>Need to utilize data in new ways</li> </ul>	<ul style="list-style-type: none"> <li>Enough features to support digitization of remaining business processes</li> <li>Ability to use data to drive other business functions (digital marketing, compliance reporting, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>Broad feature set and workflow</li> <li>External-facing apps/forms</li> <li>GoCanvas is the system of record</li> <li>Attributable business impact to top line and other metrics beyond efficiency</li> </ul>

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Trigger		
Problem / concern	Expectation / desire	Get / perceive
<ul style="list-style-type: none"> <li>Shifting customer expectations</li> <li>Competitive pressure</li> <li>Laborious processes</li> </ul>	<ul style="list-style-type: none"> <li>Digital/mobile solution</li> <li>Just works, easy to deploy</li> <li>Is there an "app for that"?</li> </ul>	<ul style="list-style-type: none"> <li>No app that works out of the box</li> <li>Custom solutions too expensive</li> <li>Confused, intimidated by tech</li> </ul>
Discovery		
Problem / concern	Expectation / desire	Get / perceive
<ul style="list-style-type: none"> <li>Unsure how to digitize</li> <li>I don't know what's out there</li> <li>I have a specific use case in mind</li> </ul>	<ul style="list-style-type: none"> <li>Works for our unique business</li> <li>Can do everything it needs to</li> <li>Is simple to use, quick to deploy</li> </ul>	<ul style="list-style-type: none"> <li>GoCanvas is clearly explained early</li> <li>It can solve our business need</li> <li>(Google) 1 day</li> </ul>
Trial		
Problem / concern	Expectation / desire	Get / perceive
<ul style="list-style-type: none"> <li>I'm extremely busy, no time</li> <li>I'm not technically savvy</li> <li>Field workers might reject it</li> </ul>	<ul style="list-style-type: none"> <li>Need to confirm it will work for us before I invest too much time and money</li> <li>Simple enough for me to use</li> <li>Field workers perceive efficiency gains</li> </ul>	<ul style="list-style-type: none"> <li>Free to try, transparent pricing</li> <li>Easy to sign up, get started</li> <li>Never confused about what to do next</li> <li>I get the help I need when I need it</li> <li>I get to the "wow" moment in &lt; 1 hr, I feel "I can do this"</li> <li>More efficient than paper forms</li> </ul>
Engagement & delight		
Problem / concern	Expectation / desire	Get / perceive
<ul style="list-style-type: none"> <li>Research project: which tools are most frequently used?</li> <li>Need a few key "wins"</li> </ul>	<ul style="list-style-type: none"> <li>Works with the tools I already use</li> <li>Take advantage of digital workflows and mobile technology</li> <li>Clear process improvements</li> </ul>	<ul style="list-style-type: none"> <li>Seamless integration with familiar tools (Excel, etc.)</li> <li>Embedded mobile tech such (GPS, photos, etc.)</li> <li>Customizable rules (ex. conditional formatting, required fields, etc.)</li> <li>High reliability, low data latency, improved data accuracy, etc.</li> </ul>
Retention & evangelization		
Problem / concern	Expectation / desire	Get / perceive
<ul style="list-style-type: none"> <li>Technology must scale to address other use cases</li> <li>Need to demonstrate high ROI</li> <li>Need to utilize data in new ways</li> </ul>	<ul style="list-style-type: none"> <li>Enough features to support digitization of remaining business processes</li> <li>Ability to use data to drive other business functions (digital marketing, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>Broad feature set and workflow</li> <li>External-facing apps/forms</li> <li>GoCanvas is the system of record</li> <li>Attributable business impact to top line and other metrics beyond efficiency</li> </ul>

Laborious process isn't an urgent enough trigger. Outbound sales?

Better product marketing to explain we are app for everything?

Need better brand recognition so we're not starting from scratch.

New design principle: single call-to-action

Research project: which tools are most frequently used?

Remove functionality from FTUX app builder

Design conflict with FTUX: progressive discovery as solution?

Which use cases are most important for SMBs? Could they be used as trigger?

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# Other Examples

## [SpaceX](#)

This video is from 2017, and it's helpful to see how they call out all the technical capabilities that make the vision possible. It's almost like a checklist for the strategic plan (as of 2023, they've already done a few of the items).

## [Microsoft Productivity](#)

## [HP Smart City](#)

## Expensify

Chat between Concierge and Rajesh External Inbox x



**Concierge**  
to me ▾

5:34 AM (11 hours ago) ☆ ↶ ⋮

Concierge: Hey there, thanks for providing feedback on disabling auto-renew on your annual subscription. I'm sorry to hear that Expensify hasn't been meeting your expectations. Let me think about what you wrote, and I'll be in touch soon to help you further.

Concierge: Hi there, thanks for your feedback. Would you mind letting me know what prompted you to make this change? Was it a decision based on price or something else?

Switch to [live chat](#) in Expensify for faster responses.

**If you have any questions, email us - [hello@prodify.group](mailto:hello@prodify.group)**

# Radical Product Thinking Vision Template



## 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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## Articles

- [Prodify: 8 Ways to Express a Product Vision](#)
- [Prodify: How to Scope a New Feature](#)
- [Drift: "The Greatest Sales Pitch I've Ever Seen"](#)
- [HubSpot: The Art of Strategy is About Knowing When to Say No](#)
- [First Round: The Management Framework that Propelled LinkedIn to a \\$20B Company](#)

## Version History

Version	Date	Changes Made
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32	10/5/23	Added context
31	5/24/23	<ul style="list-style-type: none"> <li>Updated Helpful Hints for Envision a 10x Customer Journey section</li> <li>Added more to Other Examples page</li> </ul>
30	5/23/23	Updates to Articles section
29	12/13/22	Updated VLPM graphic in Overview section
28	11/7/22	Added link to Kano Model worksheet in step 3
27	4/27/22	Added Radical Product Thinking Vision template
26	4/1/22	Added Other Examples section
25	3/4/21	Updated Helpful Hints
24	2/19/21	Added section to Helpful Hints about assumptions
23	9/14/20	<ul style="list-style-type: none"> <li>Updated market trends to include COVID research</li> </ul>
22	9/12/20	<ul style="list-style-type: none"> <li>Updated overview graphic</li> <li>Linked to strategic product planning and roadmapping guides</li> </ul>
21	9/6/20	Moved product strategy content into new strategic product planning guide and renamed document to focus on vision
20	8/11/20	Added new Chuckwagon comic strip visual from designer
19	7/29/20	Updated email in footer
18	5/7/20	Added cover page and footer contact information
17	12/13/19	Added new visuals to Vision-Led PM overview section
16	11/4/19	Changed order to focus on overview/instructions first, then examples
15	9/5/19	Changed “Template” heading to “Process”
14	8/12/19	Added customer journey vision worksheet content to Template section
13	8/8/19	<ul style="list-style-type: none"> <li>Created Template section</li> <li>Updated Chuckwagon strategy section</li> <li>Rebranded to Prodifly</li> </ul>
12	7/12/19	<ul style="list-style-type: none"> <li>Added vision visual (comic strip)</li> </ul>

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		<ul style="list-style-type: none"> <li>Updated font</li> </ul>
11	1/11/19	Updated vision story to highlight Sharon's initial pain point
10	7/30/18	Clarified Vision Option column headings
9	7/10/18	<ul style="list-style-type: none"> <li>Added comments to clarify that vision/strategy is the synthesis of all the analysis done prior</li> </ul>
8	5/15/18	<ul style="list-style-type: none"> <li>Added comment to stakeholder JTBD section explaining to be exhaustive initially</li> <li>Added article about saying no</li> </ul>
7	5/8/18	<ul style="list-style-type: none"> <li>Moved KPIs into recommended vision option section</li> </ul>
6	5/7/18	<ul style="list-style-type: none"> <li>Added comment about emotional JTBD</li> <li>Changed comment on vision to focus on picking what stakeholder JTBD to do</li> <li>Added comment on different types of current solutions to focus on</li> </ul>
5	4/20/18	Added Drift article link
4	3/29/18	<ul style="list-style-type: none"> <li>Added sentence in overview explaining what Chuckwagon does</li> <li>Changed Rajesh/Kripa's name</li> <li>Updated KPIs</li> <li>Added Instacart stakeholder</li> <li>Added context on why Emma wants to earn more money</li> <li>Added milestones for each strategy phase</li> </ul>
3	3/26/18	Added variety of recipes as performance feature to Kano model
2	3/23/18	Updated comment on journey to call out emotions
1	3/21/18	Official first version

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