**Vision Creation Worksheet**

In our experience, an effective productization vision includes three things:

1. Why you are pursuing the goal due to impact on customers or employees (your purpose)
2. Where you want your productization efforts to lead you (your high-level goal and performance targets)
3. What you will do and for whom to get there (your strategy)

**Productization Vision Template:**

We will change the way *[target customer segment*] solves *[urgent and expensive customer problem]* through the development of *[tech-enabled/standardized products or services or solutions]*. We will *[overarching business goal]* by *[reaching specific targets].*

**Brainstorm:**

**Part 1:** *Why* are you pursuing the goal due to impact on customers or employees?

Think about:

* What positive impact do you want this change to have on customers?
* Who are your target customers?
* What urgent and expensive problem are you aiming to solve for customers?
* What positive impact do you want this change to have on employees?
* What do you want to be known for by customers, employees and investors?

**Part 2**: *Where* do you want your productization efforts to lead you?

Think about:

* What does success look like?
* If you succeed, what will the organization look like in one, three and five years?
* What productization archetype do you want to begin with?

**Part 3:** *What* will you do *for whom* to get you there?

Think about:

* What will you do to achieve this success in the short term? In the long term?
* What are your performance targets/goals?
* By when will you achieve this?

**Create Your Organization’s Productization Vision:**

We will change the way *[target customer segment*] solves *[urgent and expensive customer problem]* through the development of *[tech-enabled/standardized products or services or solutions]*. We will *[overarching business goal]* by *[reaching specific targets].*

**Productization Vision Examples:**

“We will change the way hospitals and healthcare systems make real-estate decisions by developing new data products to offer alongside our design services. We will grow revenue and improve margins by selling $20M of data products at 40 percent net margin in the next three years.”

“We will help 1,000 US-based organizations develop more inclusive leaders by scaling our programs using technology. We will improve margins and employee satisfaction by shifting our revenue to 80 percent standardized and tech-enabled programming by 2026.”

“We will help mid-size organizations protect their intellectual property using the same tactics that previously only the largest organizations could afford by creating a suite of high-quality, do-it-yourself IP protection support tools. We will grow revenue by selling $30M in products to this new market segment by 2025.”