Making the Vision Solid: Design-the-Box and the Elevator Test

Objective

The product vision box and elevator test statement galvanize members of the product team into focusing their often disparate views of the product into a concise, visual, and short textual form. These two project artifacts provide a "high concept" of the product for marketers, developers, and managers.[1]

Discussion

Innovation, or creating emergent results that we cannot predict, requires an evolutionary process that can accommodate exploration and mistakes. A good product vision remains relatively constant, while the path to implement the vision needs room to wander. Emergent results often come from purposeful accidents, so managers must create an environment in which these accidents can happen. Without a core concept, team members can spend time investigating blind alleys and racking up costs without contributing to the project's success. Particularly with new products for which the risk and uncertainties are high, having a core concept, a vision, is critical to keeping down the cost of exploration.[2]

Preparation: The Positioning Statement

One way to clarify the core concept is to describe the problem/solution domain in a Positioning Statement[3] also called a Problem Statement[4]

The problem of (what) **affects** (who), **the impact of which is … . A successful solution would be … .**

Once the team agrees upon the positioning of the product and solution, it can be tempting to flow directly into developing the solution. But there are benefits to delaying the solution. By inviting the team to explore their problem/solution domain in a hands-on manner, we introduce non-linear and non-verbal learning. This can deepen their connection to the core concept, providing a solid basis for emergent design later. Without this solid vision, iterative development projects are likely to become oscillating projects, because everyone is looking at the minutiae rather than the big picture[5]. In addition, significant obstacles or alternatives may surface, which might otherwise have been revealed too late.

The Design-the-Box Exercise[6]

One way to get people thinking differently about the problem/solution domain is the design-the-box exercise. The project and customer teams, with other participants, develop the product's real or imagined marketing theme, a crisp visual image and feature description whose intent is to draw potential customers into further investigation. As they do this, an Elevator Test statement can be developed in parallel, engaging both visual and verbal participants.

The Elevator Test Statement

The "elevator test" is the ability to explain an idea—no matter how abstract—in about the time that it takes to ride up or down a short elevator. The purpose is to describe the offering in simple terms that are free of hype. The elevator test gained prominence as an innovation technique after being described by Geoffrey Moore.[7]

Summary

The product vision box and elevator test statement together vividly depict a product vision. Results may vary widely - presentations by each of the groups are then followed by a discussion of how the different focal points can be reduced to a few that everyone agrees upon. This event emphasizes that projects produce products. Some projects (e.g., internal IT projects) may not create products for the external market, but viewing them as products for an internal market keeps the team grounded in a customer-product mindset. Whether the project results involve enhancements to an internal accounting system or a new digital camera, product-oriented thinking reaps benefits.[8]

Visioning Exercises:

The team needs to be aligned on their objectives – what they are doing, and why. The Positioning Statement is a good way to start. Following this tabular format helps get to the core of the vision quickly, without writing a lot of ambiguous or confusing prose.[9]

Positioning Statement:

The problem of … (what)	
affects … (who)	
the impact of which is …	
A successful solution would be …	

Ideally, the Positioning Statement is created at least a day before the Design-the-Box exercise. This is to allow people to process it, particularly those who are visual rather than verbal. Ample time should be provided for the next step, at least 2 hours, up to half a day for a 4- to 6-month project.[10]

Other Stakeholders:[11]

Stakeholders are not only customers, or even necessarily the most important stakeholders. They are anyone who has an interest, usually a vested interest, in the success of the product or project. Identifying them early

Identify ***who*** these are, and ***how important*** their input/acceptance is to the success of your product/project:

Design-the-Box Exercise:[12]

The entire team, including customers, breaks into groups of four to six people. Their task is to design the product box—front and back. This involves coming up with:

- a product name,
- a graphic,
- three to four key bullet points on the front to "sell" the product,
- a detailed feature description on the back,
- and operating requirements.

Elevator Test:

Does the team understand the product? The test: explain it, without jargon, in the time it takes to ride an elevator. (two minutes or less)

> Example: ***For*** midsized companies' distribution warehouses ***who*** need advanced carton movement functionality, ***the*** Supply-Robot ***is a*** robotically controlled lifting and transferring system ***that*** provides dynamic warehouse reallocation and truck loading of multisized cartons that reduces distribution costs and loading time. ***Unlike*** competitive products, ***our product*** is highly automated and aggressively priced.[13]

For (target customer)

Who (statement of the need or opportunity)

The (product name) _____ ***is a*** (product category)

That (key benefit, compelling reason to buy).

Unlike (primary competitive alternative)

Our product (statement of primary differentiation)

The materials for these exercises have been compiled by Deborah Hartmann, based on the following resources:

End Notes

[1] Highsmith, Jim. **Agile Project Management: Creating Innovative Products**. Addison-Wesley, 2004. Chapter 5.

[2] Highsmith, ibid.

[3] Highsmith, ibid.

[4] Pollice, Gary, Liz Augustine, Chris Lowe, Jas Madhur. **Software Development for Small Teams: A RUP-Centric Approach.** Addison Wesley Professional, 2003.

[5] Highsmith, ibid. Quoting Ken Delcol: "This statement is true regardless of the development approach. The big picture is key for both, and the joy of the iterative approach is that if you are lacking one, it should become obvious sooner than in the case of the traditional approach. The traditional approach creates the illusion that a vision exists for a number of months before someone figures out what is going on."

[6] Highsmith, ibid.

[7] Moore, Geoffrey A. **Crossing the Chasm: Marketing and Selling High-Tech Products to Mainstream Customers**. New York: HarperBusiness, 1991.

[8] Highsmith, ibid.

[9] Pollice, ibid.

[10] Highsmith, ibid.

[11] Pollice, ibid.

[12] Highsmith, ibid.

[13] Pollice, ibid.