

# over night strat=gist

## Strategist Toolkit

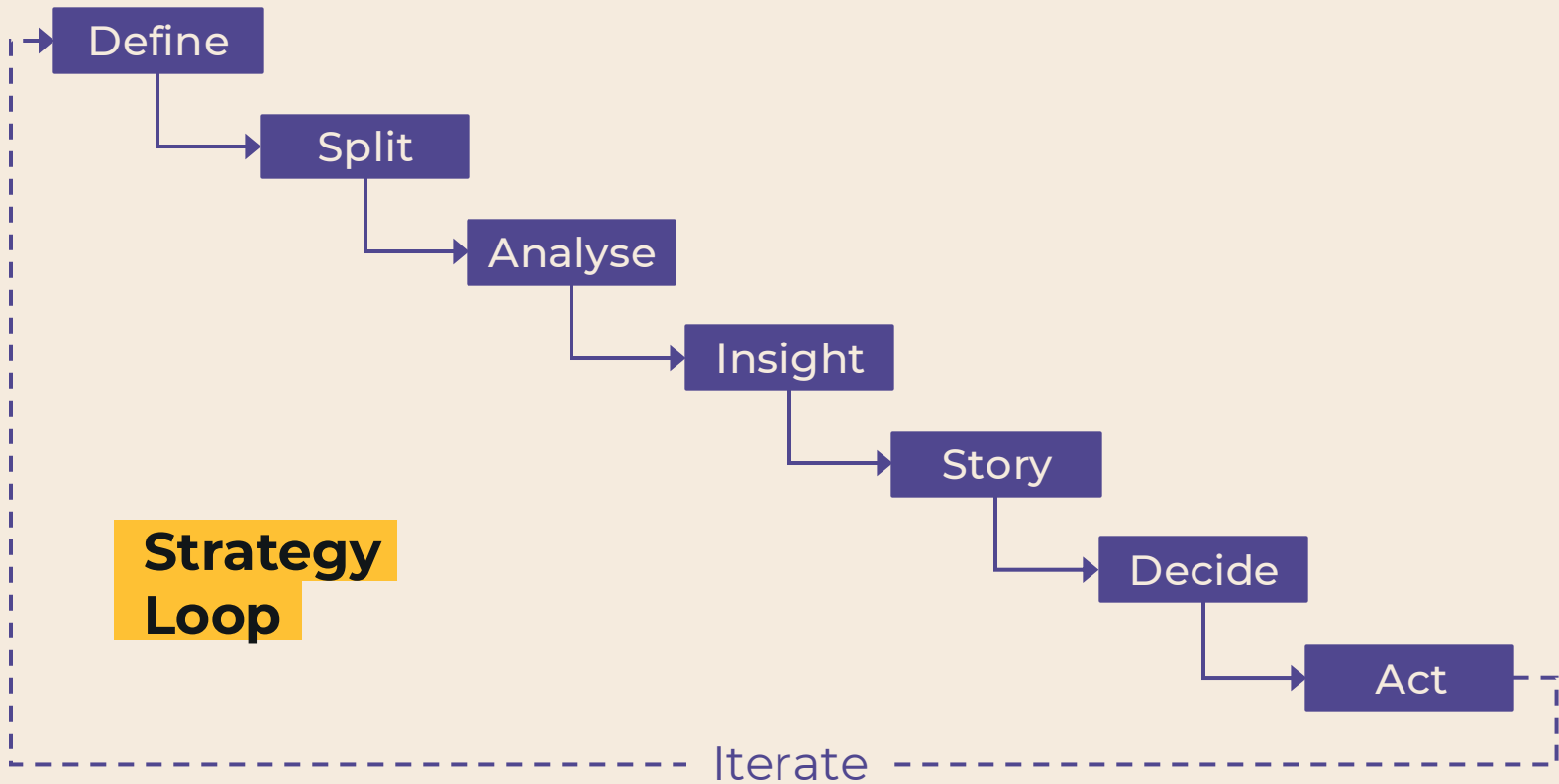
70 stylish, modern frameworks to help you create your next strategy using a simple 7-step strategic thinking model



# Strategic Thinking

OVERNIGHT STRATEGIST

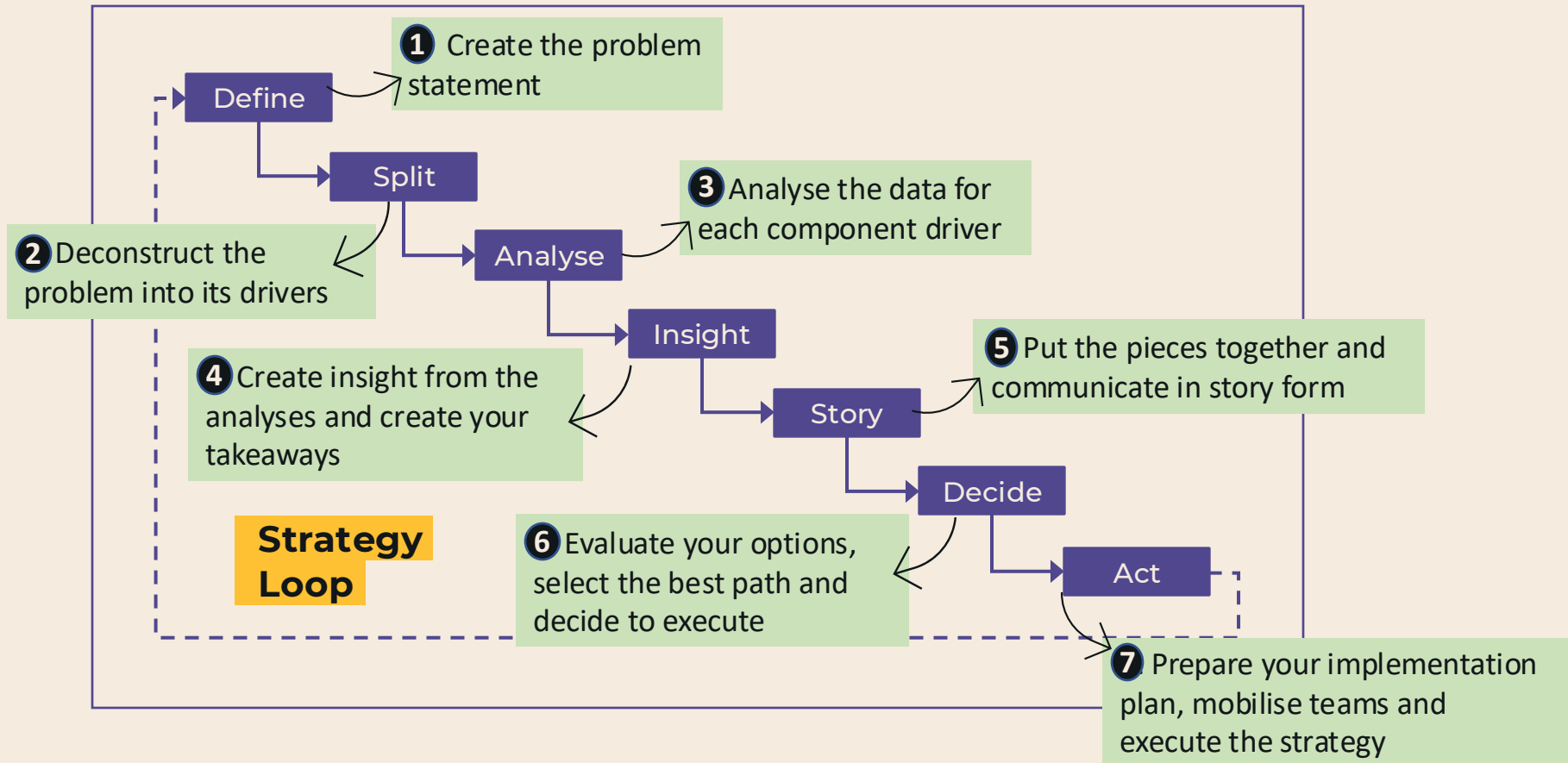
FRAMEWORK



# Strategic Thinking

OVERNIGHT STRATEGIST

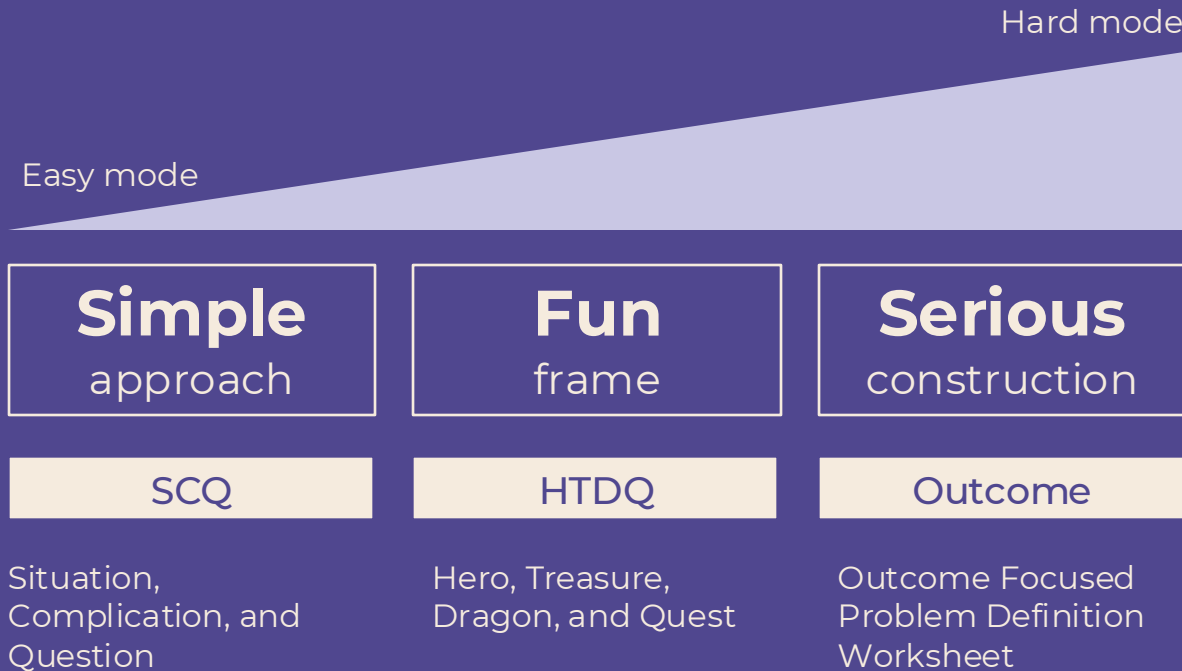
INSTRUCTIONS



# Define

OVERNIGHT STRATEGIST

## Problem Definition Frameworks

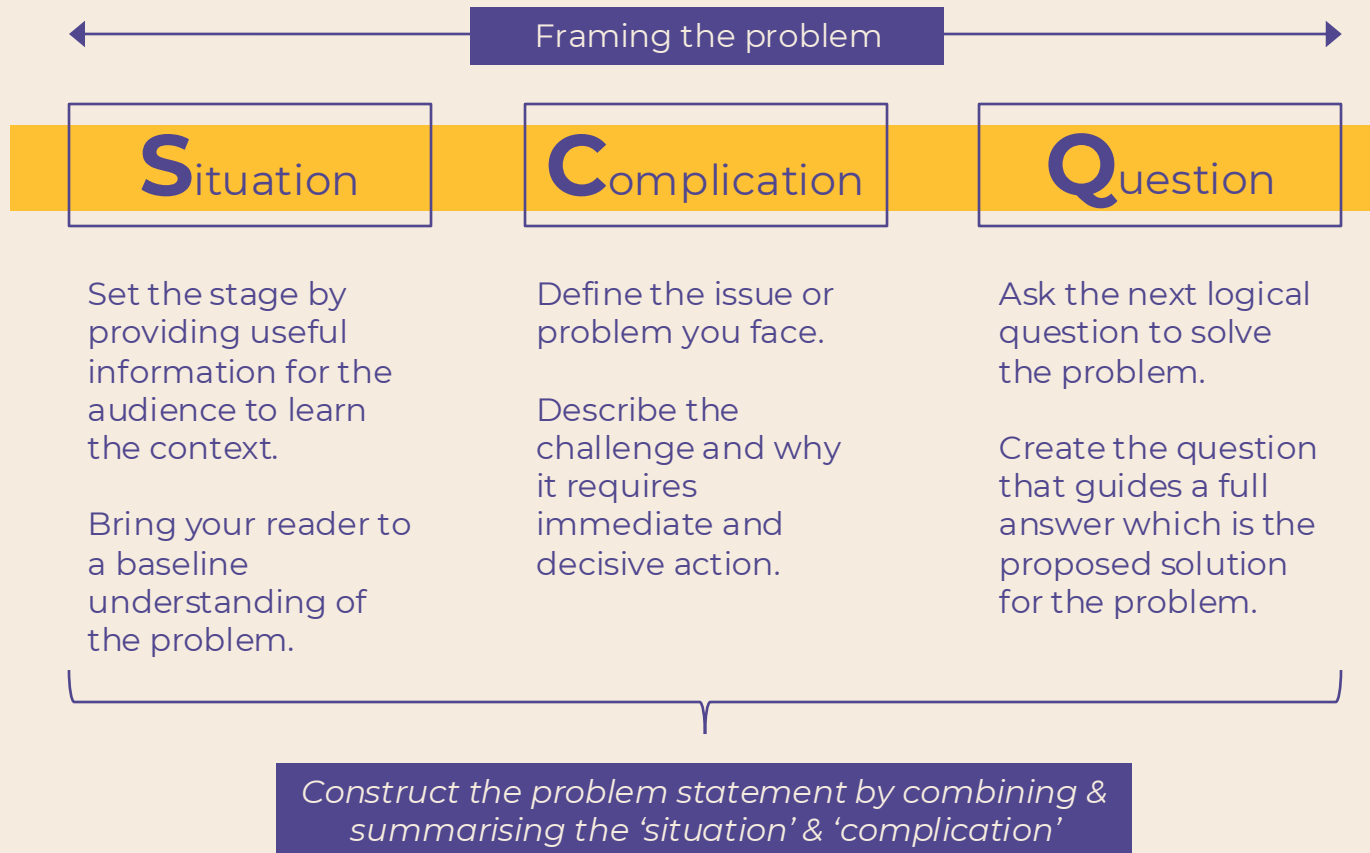


# SCQ

## DEFINE

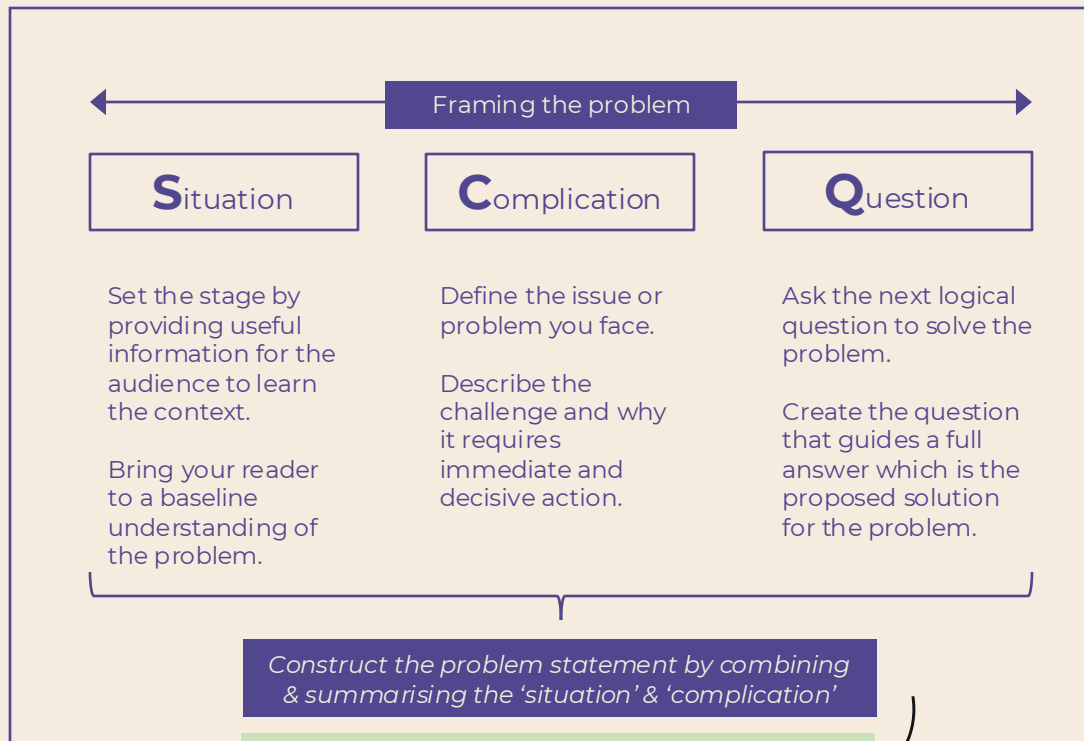
OVERNIGHT STRATEGIST

FRAMEWORK



# SCQ

## DEFINE



### State the problem ->

Example:  
To return subscriber growth to a sustainable run rate of >1,000 subs per month by 2024.

### Set the stage ->

S

Example:  
Acme Design launched its learning platform offering subscription for its suite of graphic design courses. It specialises in high quality courses taught by industry veterans.

### Intro the problem: ->

C

Example:  
After a period of steady growth, the trend has reversed and the rate of new subscribers is declining by 5% a month for the past 3 months.

### Ask the question ->

Q

Example:  
How can Acme Design turnaround its subscriber sales?

# HTDQ

## DEFINE

OVERNIGHT STRATEGIST

FRAMEWORK

### Hero-Treasure-Dragon-Quest Sequence

#### Hero

Information and context needed to specify the part of the 'universe of interest'

#### Treasure

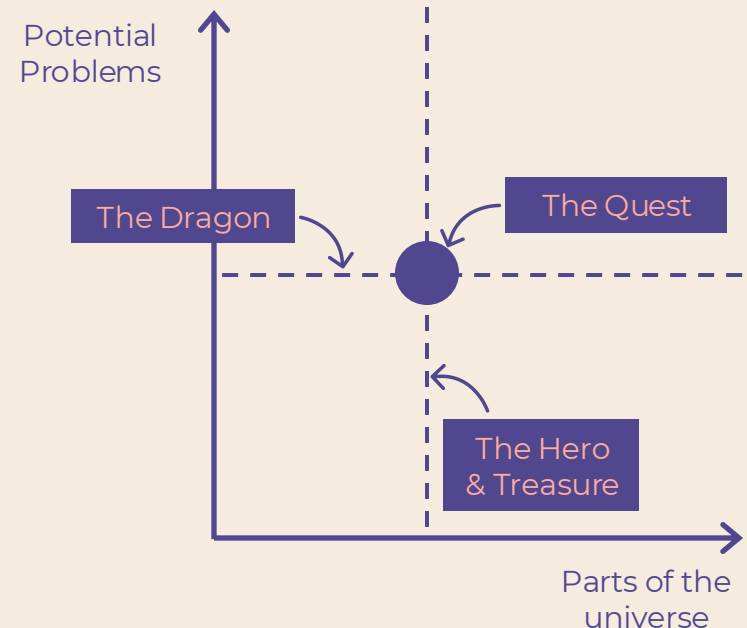
The hero's aspiration

#### Dragon

The one problem separating the hero from the treasure

#### Quest

The overarching question that you are solving, phrased as: How should **[the hero]** get **[the treasure]**, given **[the dragon]**?



Ref. Albrecht Enders & Arnaud Chevallier, Solvable, HTDQ Sequence

# HTDQ

## DEFINE

OVERNIGHT STRATEGIST

INSTRUCTIONS

### Hero: State the facts

H

Example:  
Acme Design launched its learning platform offering subscription for its suite of graphic design courses. Subscriber growth started strong but plateau for last 6 months.

### Treasure: State the goal

T

Example:  
Acme Design wants to grow subscribers by 20% per year.

### Dragon: State the obstacle

D

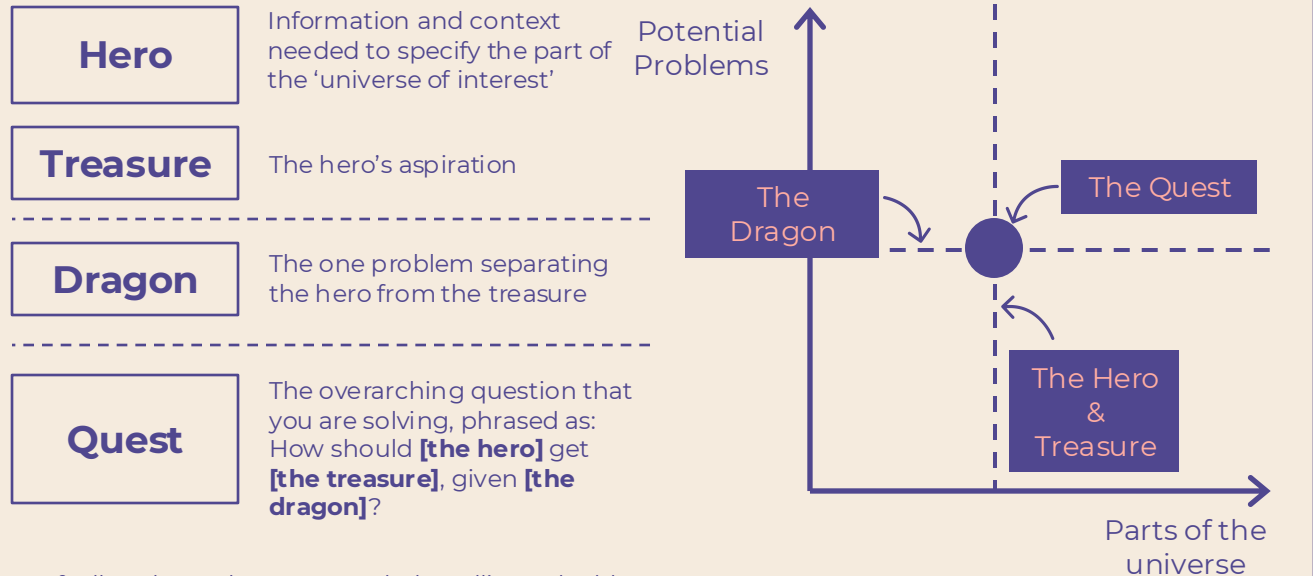
Example:  
Not many really know Acme now offers learning courses.

### Quest: Restate as a question

Q

Example:  
How should Acme Design grow subs at 20% per year, given people don't know about its new offer?

### Hero-Treasure-Dragon-Quest Sequence



Ref. Albrecht Enders & Arnaud Chevallier, Solvable, HTDQ Sequence



# Outcome

## DEFINE

### S Statement

**Problem statement.**  
What is the problem  
we are trying to solve?

Problem  
Definition  
Checklist



**D**ecider

**Decision maker.** Who needs to decide or act?



**C**riteria

**Criteria for success.** How does the decision  
maker know the problem is successfully solved?



**F**orces

**Key forces acting on the decision maker.** What  
concerns do the decision makers have?



**T**imeframe

**Timeframe for resolving issue.** How quickly is  
the answer needed?



**C**onstraints

**Constraints on the issue.** What is off-limits or  
not under consideration?



**A**ccuracy

**Accuracy necessary.** What level of accuracy is  
needed?

*Ref. Charles Conn & Robert McLean, Bulletproof Problem Solving, Problem Definition Worksheet*

# Outcome

## DEFINE

### Statement

**Problem statement.**  
What is the problem  
we are trying to solve?

#### Characteristics of a good problem statement:

- Outcomes focused
- Specific and measurable
- Clearly time-bound
- Addresses decision maker's constraints, concerns
- Adequately scoped to allow space for creative answers
- Solved at the highest order, not a partial solve



**D**ecider

**Decision maker.** Who needs to decide or act?



**C**riteria

**Criteria for success.** How does the decision maker know the problem is successfully solved?



**F**orces

**Key forces acting on the decision maker.**  
What concerns do the decision makers have?



**T**imeframe

**Timeframe for resolving issue.** How quickly is the answer needed?



**C**onstraints

**Constraints on the issue.** What is off-limits or not under consideration?



**A**ccuracy

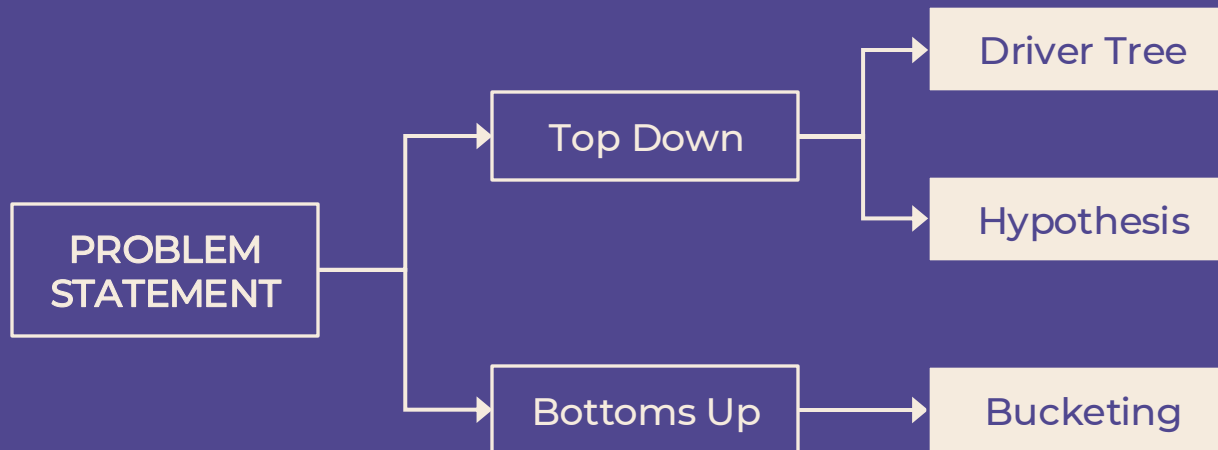
**Accuracy necessary.** What level of accuracy is needed?

*Source: McLean, Bulletproof Problem Solving, Problem Definition Worksheet*

Construct the "Problem Definition Worksheet" using these components.

# Split

## Methods to Break Down Problems

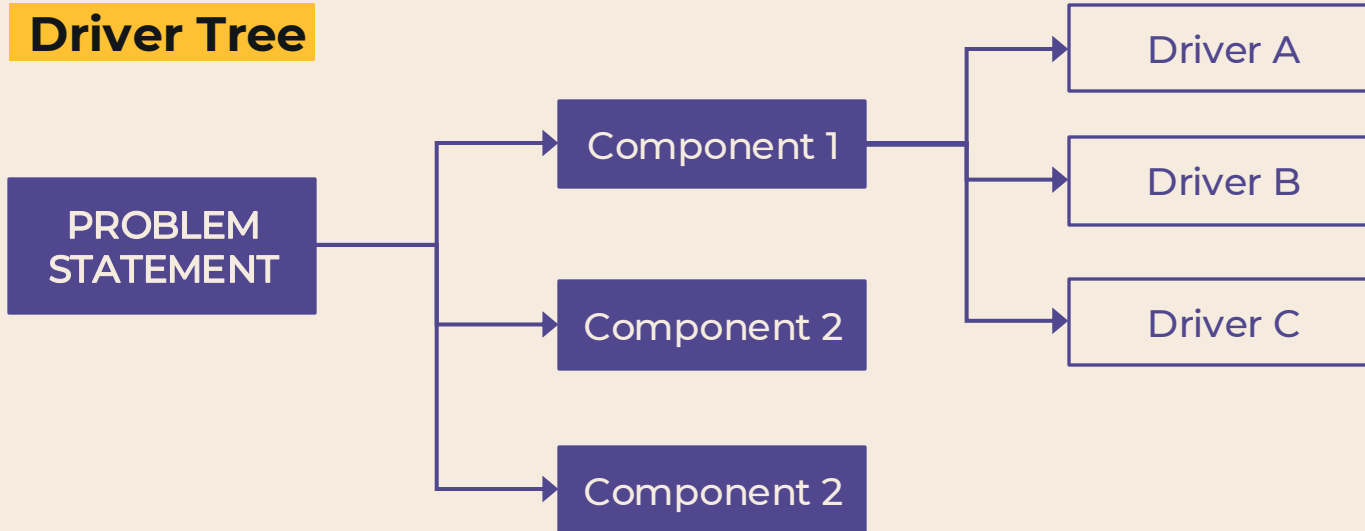


# Driver Tree

SPLIT

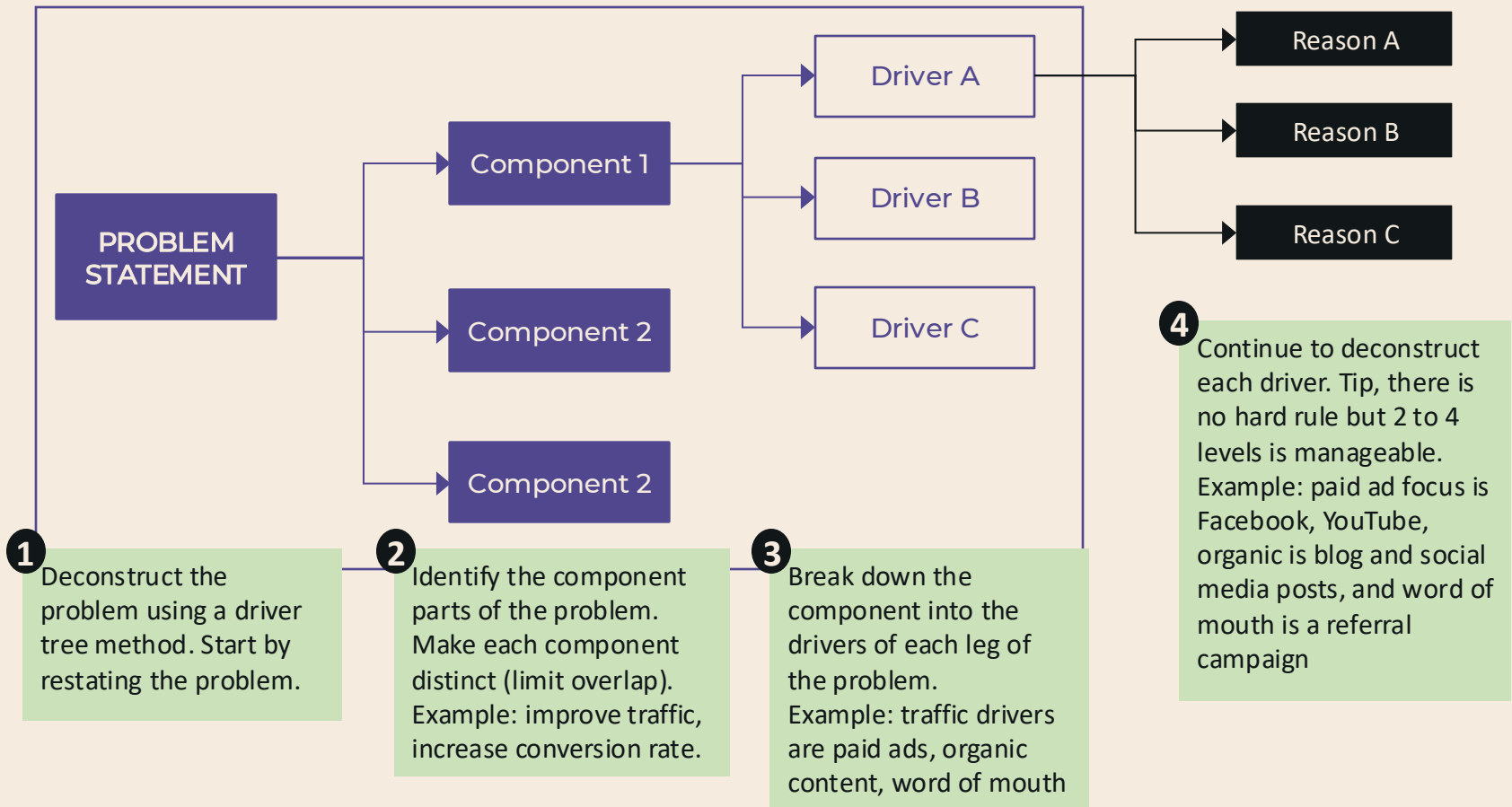
OVERNIGHT STRATEGIST

FRAMEWORK



# Driver Tree

## SPLIT



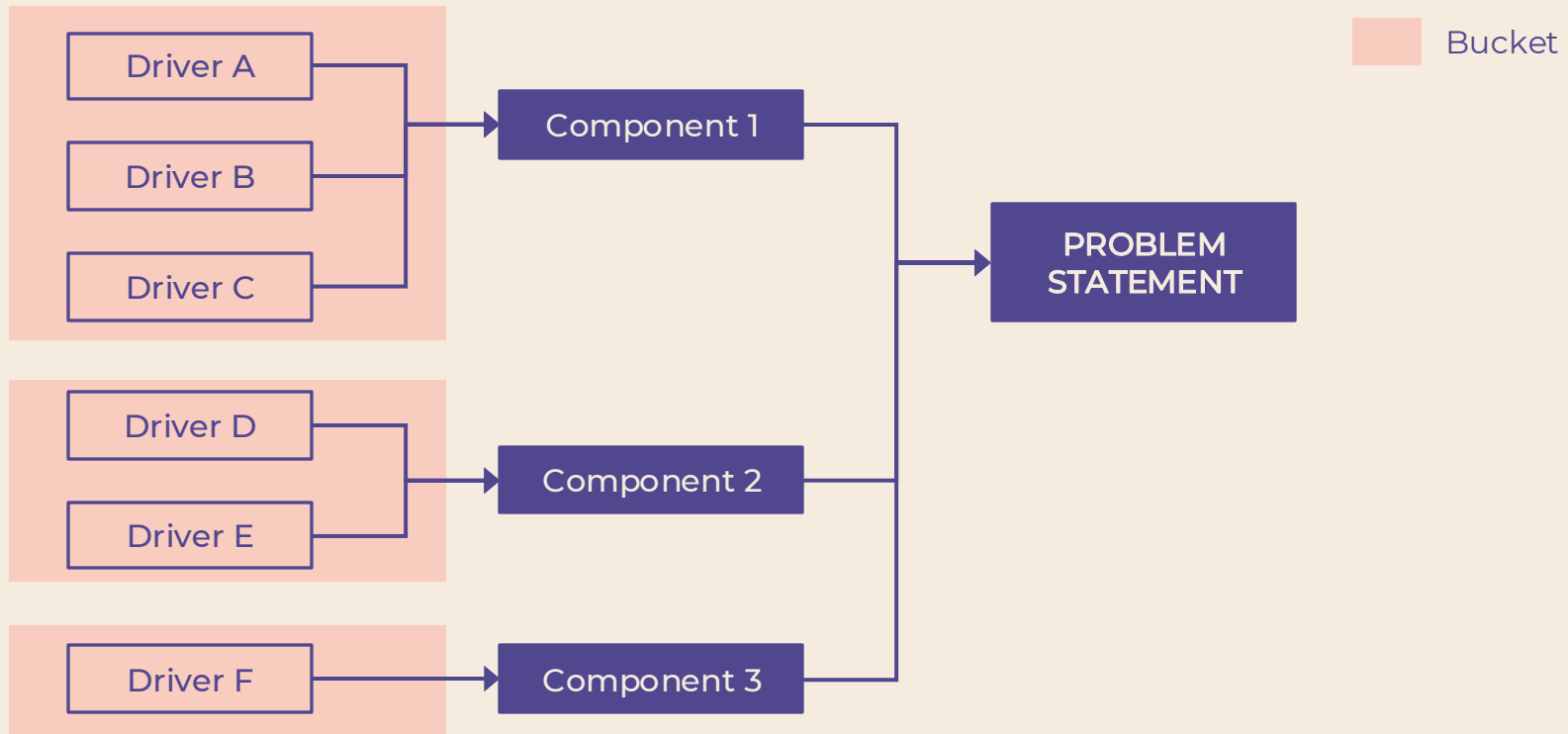
# Bucketing

## SPLIT

OVERNIGHT STRATEGIST

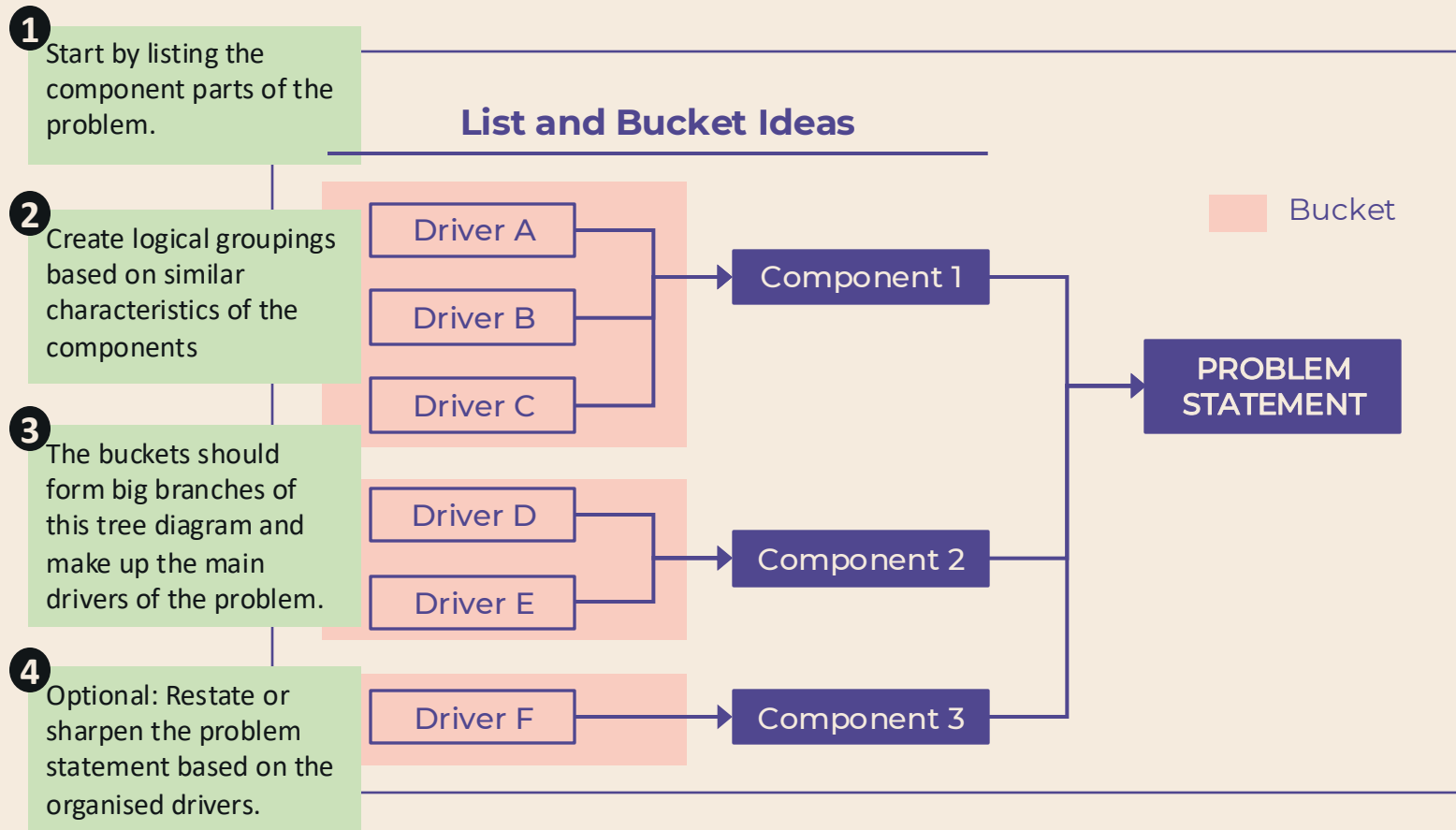
FRAMEWORK

### List and Bucket Ideas



# Bucketing

## SPLIT



# Hypothesis

## SPLIT

OVERNIGHT STRATEGIST

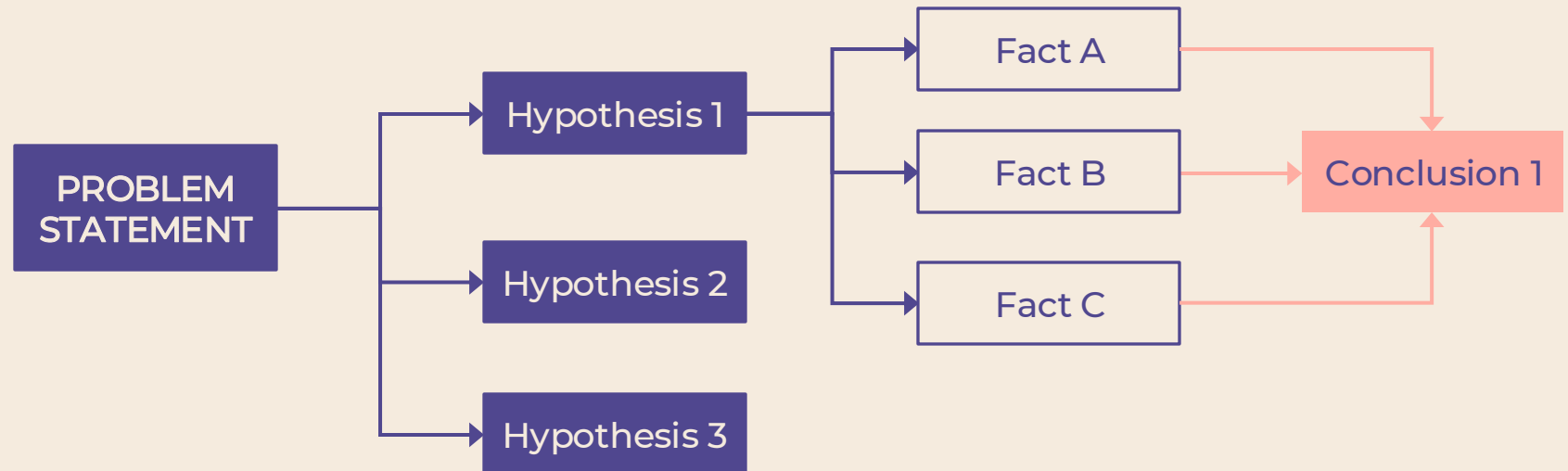
FRAMEWORK

### Hypothesis Tree

List of  
Hypotheses

Facts from  
Investigation

Prove or Disprove  
Hypothesis



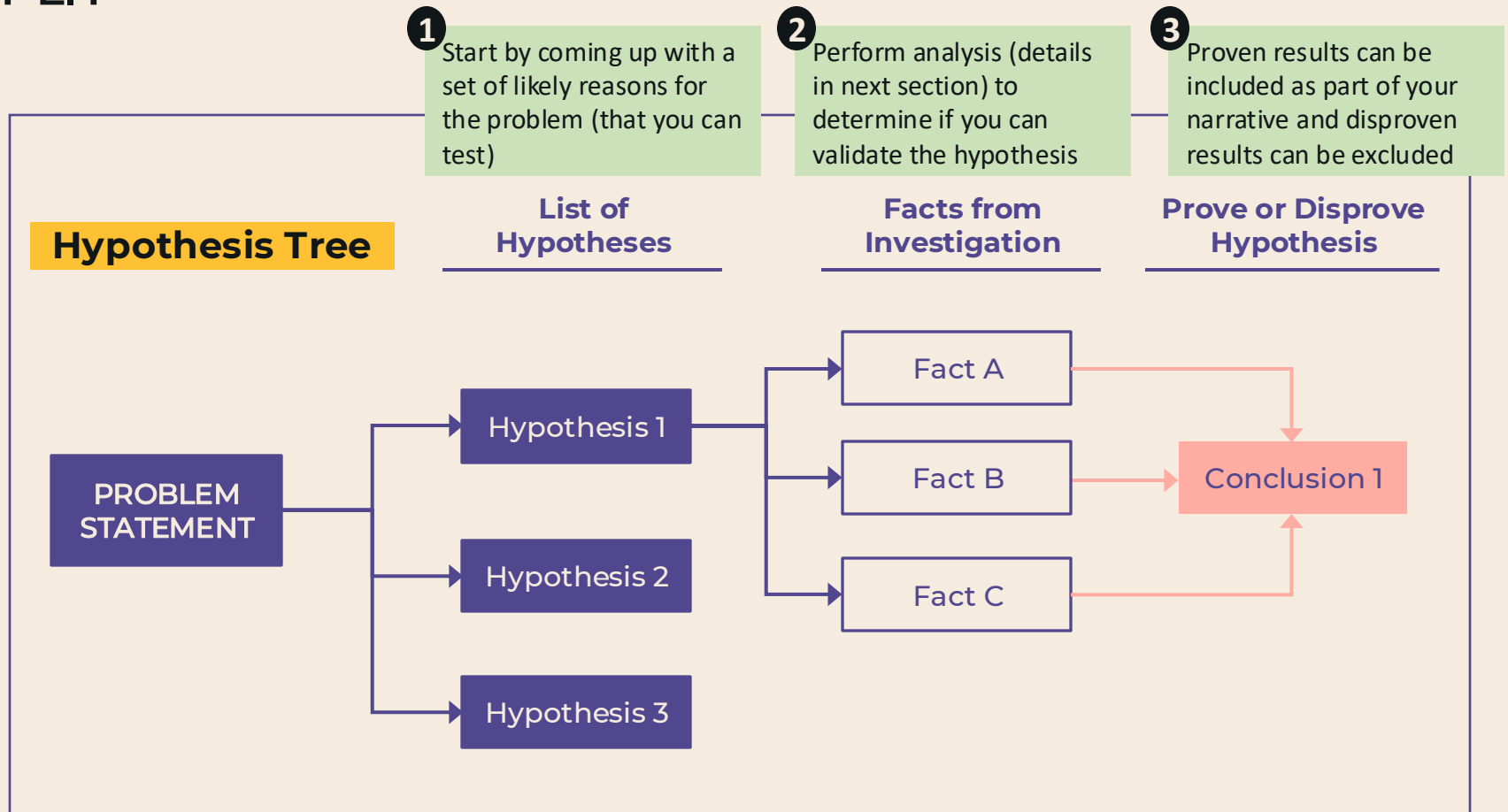


# Hypothesis

## SPLIT

OVERNIGHT STRATEGIST

INSTRUCTIONS



# Analyse

← Quantitative → ← Qualitative →

<b>Data</b> analysis	<b>Financial</b> analysis	<b>Question</b> analysis
Trend	Unit Economics	5 Whys
Comparison	Waterfall	5W + H
Mix	Marginal Return	Yes/No
Distribution	Cashflow	
Scatter	ROIC	
Cumulative	Actual v Target	
Candlestick	Profit Margin	
Rank		

# Trend

## ANALYSE

Chart Title  
units

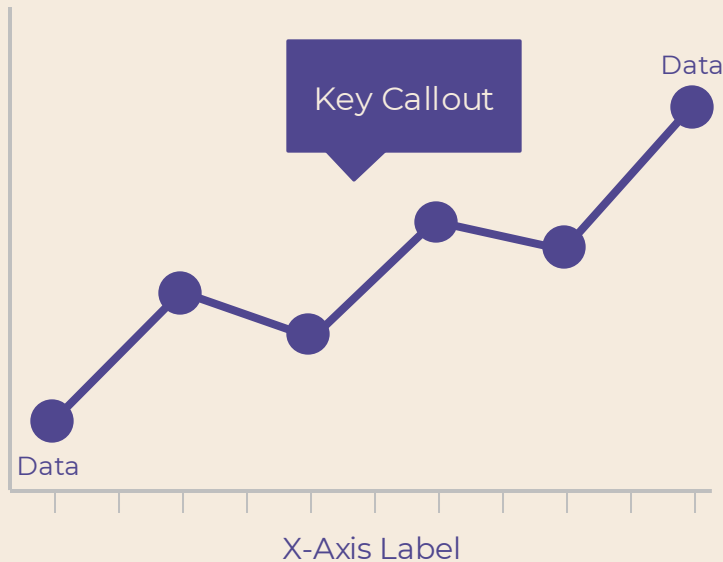
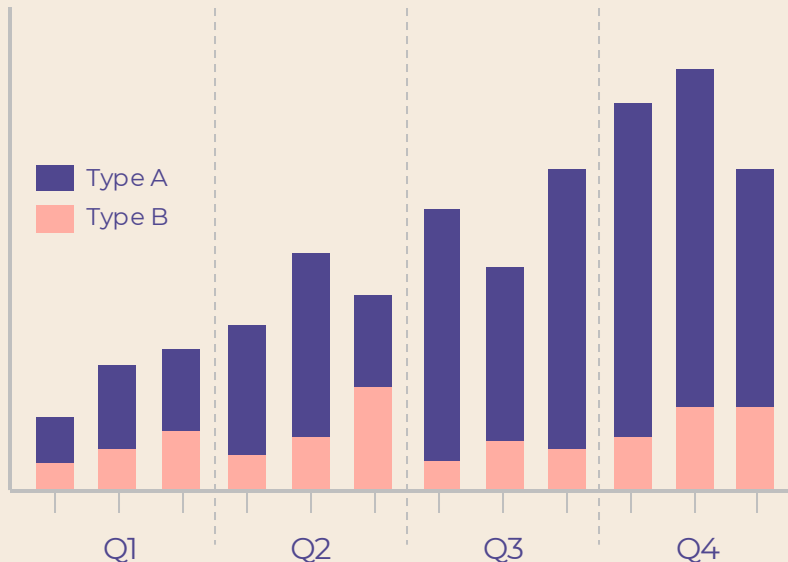


Chart Title  
units



# Trend

## ANALYSE

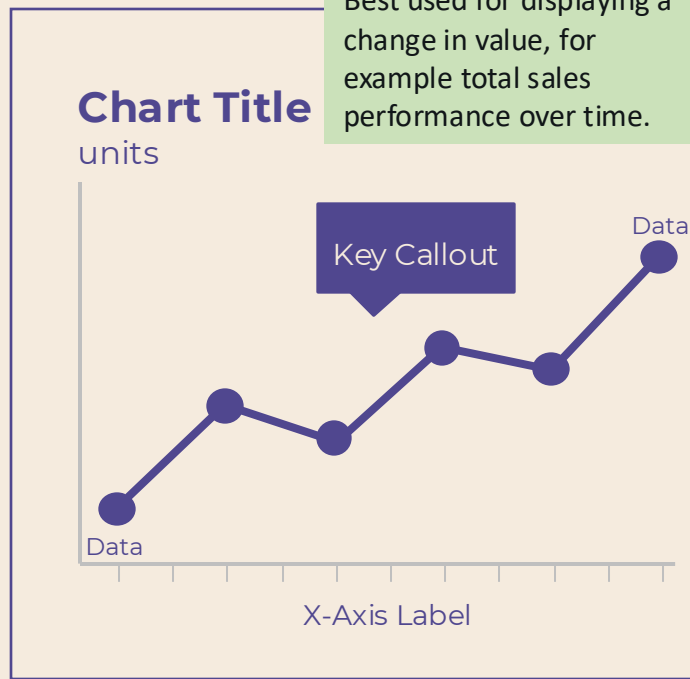
OVERNIGHT STRATEGIST

INSTRUCTIONS

1

### Line chart:

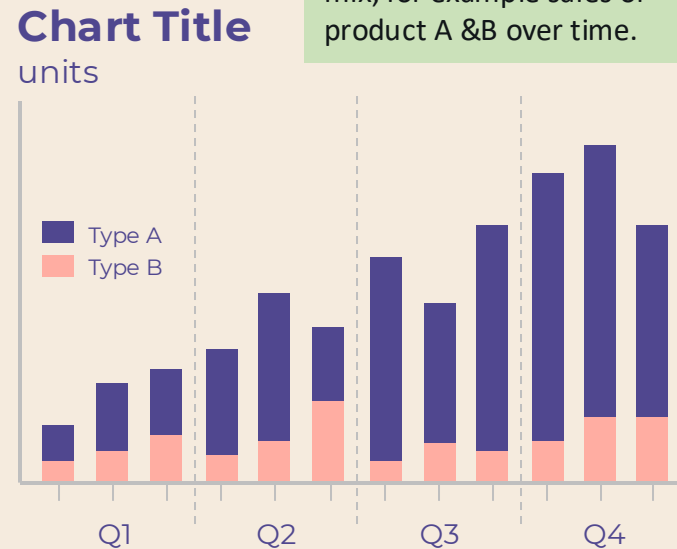
Best used for displaying a change in value, for example total sales performance over time.



2

### Stacked bar chart:

Best used when you want to also show change in value and mix, for example sales of product A & B over time.



# Comparison

## ANALYSE

Chart Title

units

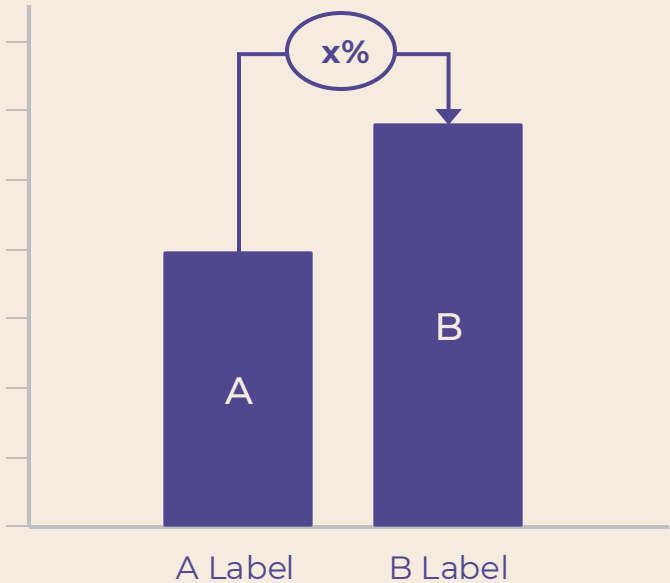
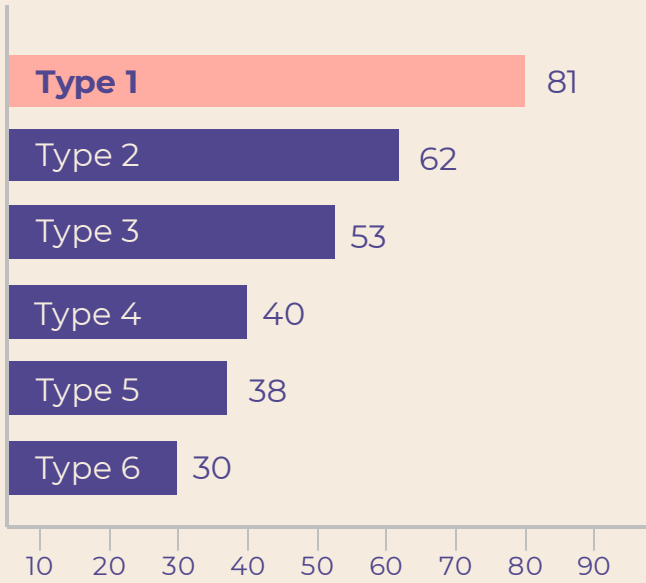


Chart Title

units



# Comparison

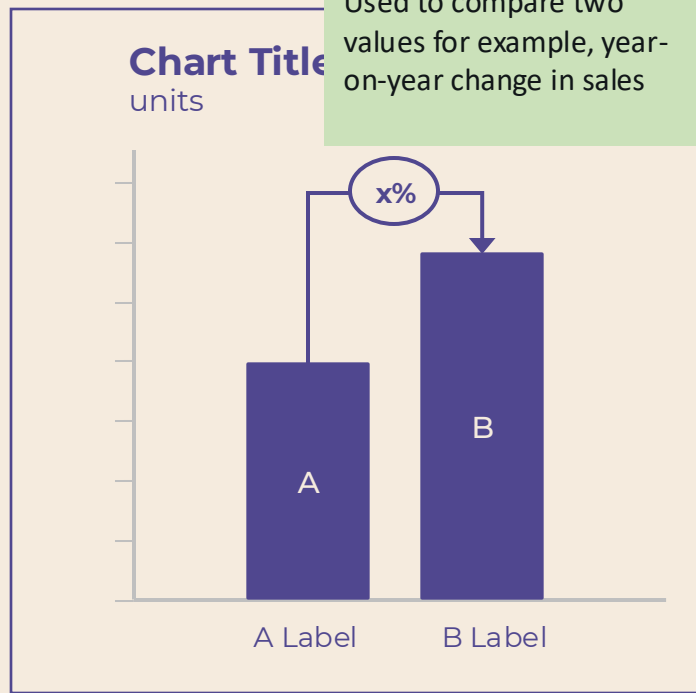
## ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS

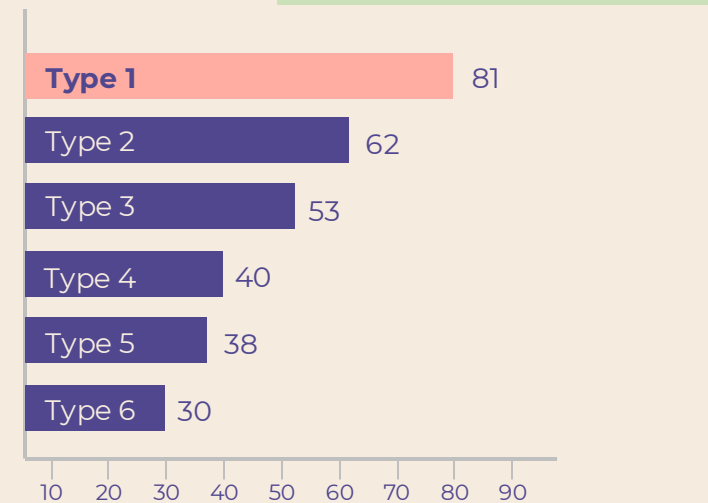
### 1 Vertical bar chart:

Used to compare two values for example, year-on-year change in sales



### 2 Horizontal bar chart:

Used to compare and rank multiple items, for example Acme Sales vs. competitors.

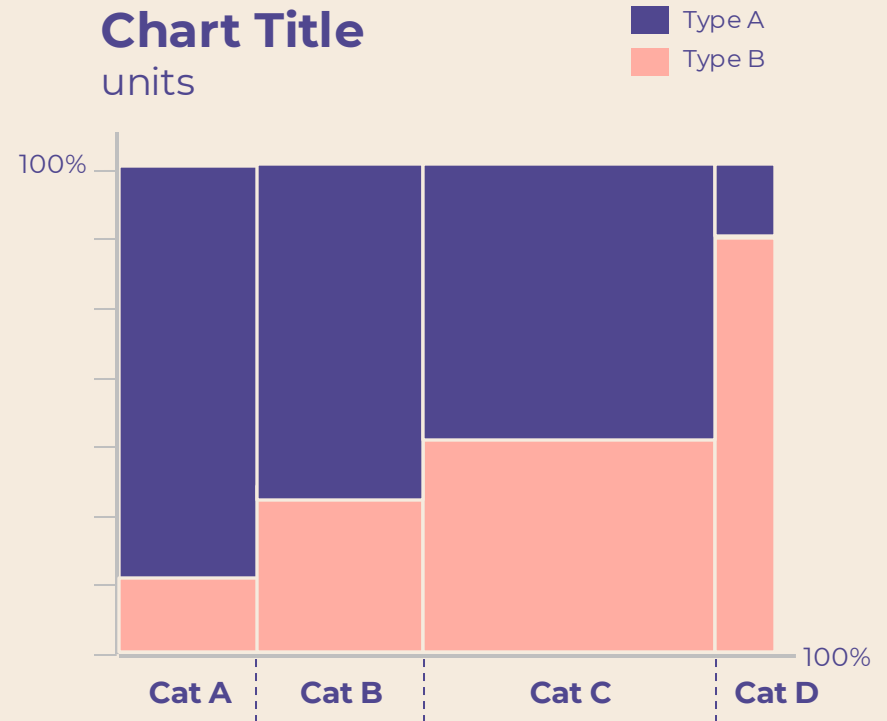
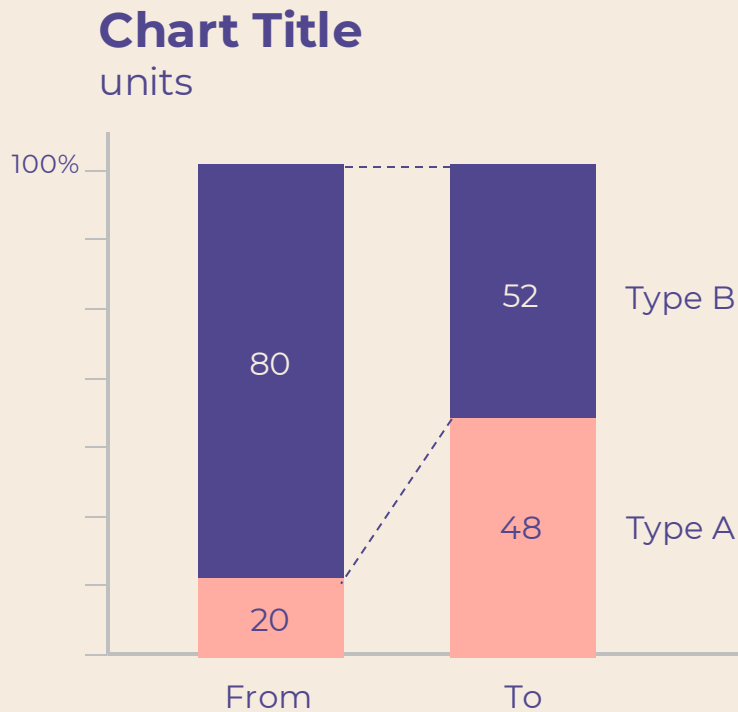


# Mix

## ANALYSE

OVERNIGHT STRATEGIST

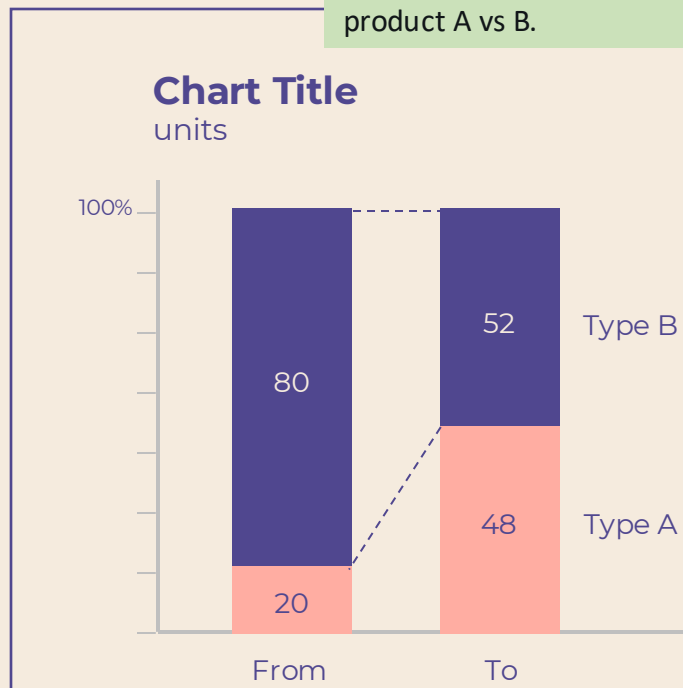
FRAMEWORK



# Mix ANALYSE

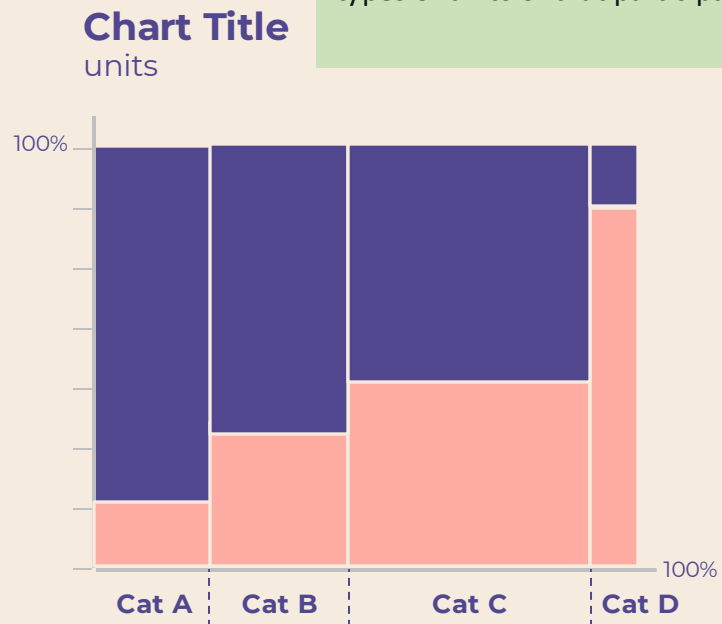
**1** Stacked bar chart:

Used to show change in % mix between 2 time periods, for example share of sales of product A vs B.



**2** Area chart:

A more complex chart, used sparingly. Can be used in market analysis to show size & share, for example size of participant by % total volume of units (x axis) and share of types of units of that participant (y axis).





# Distribution

## ANALYSE

Chart Title

units

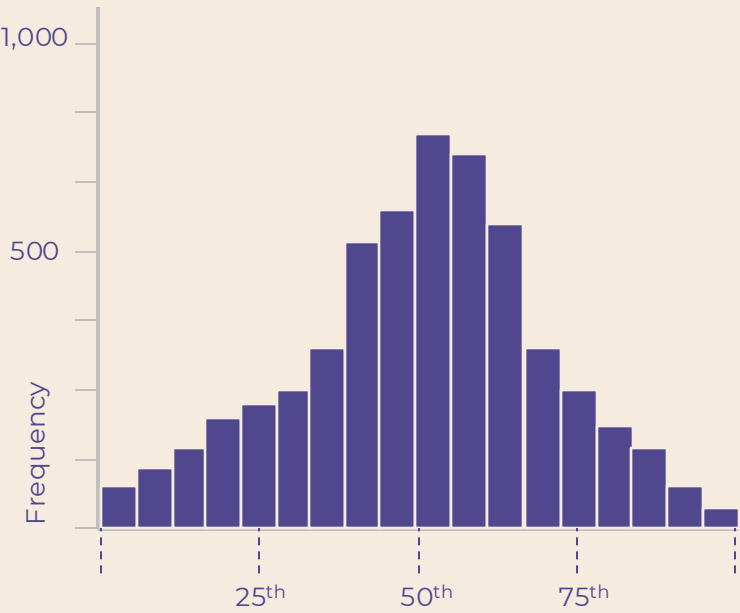
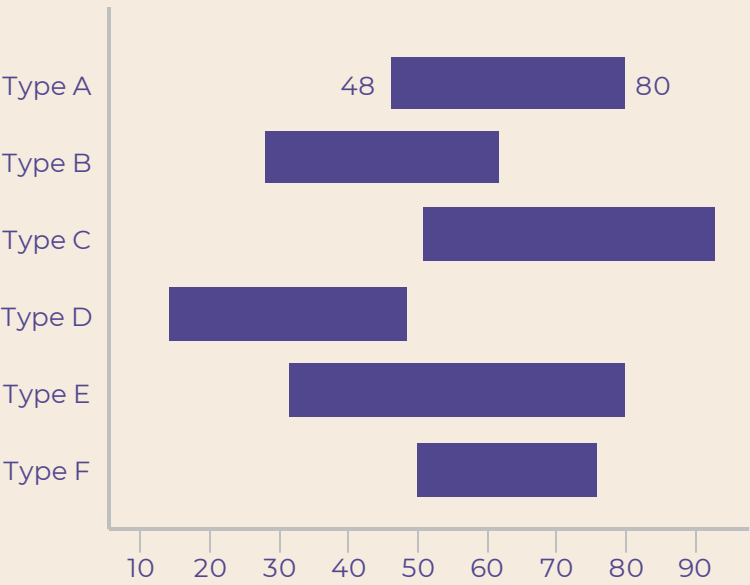


Chart Title

units



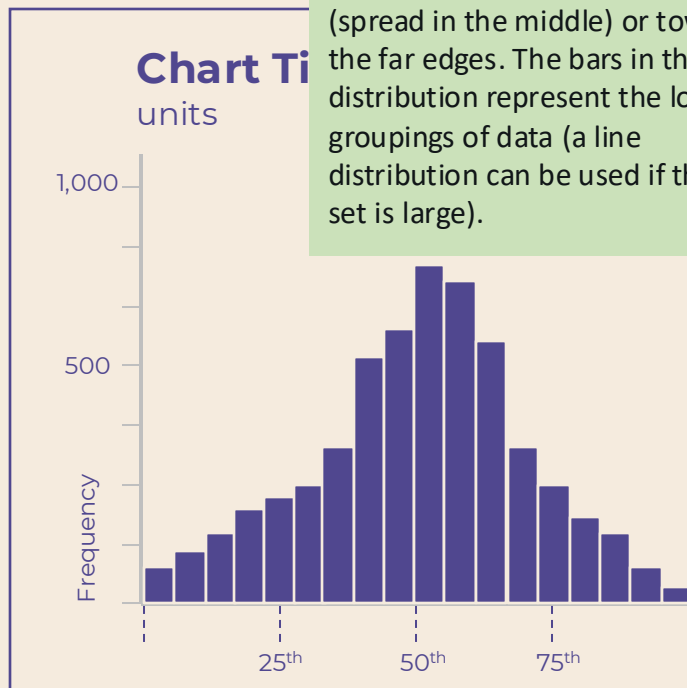
# Distribution

## ANALYSE

1

### Distribution bar chart

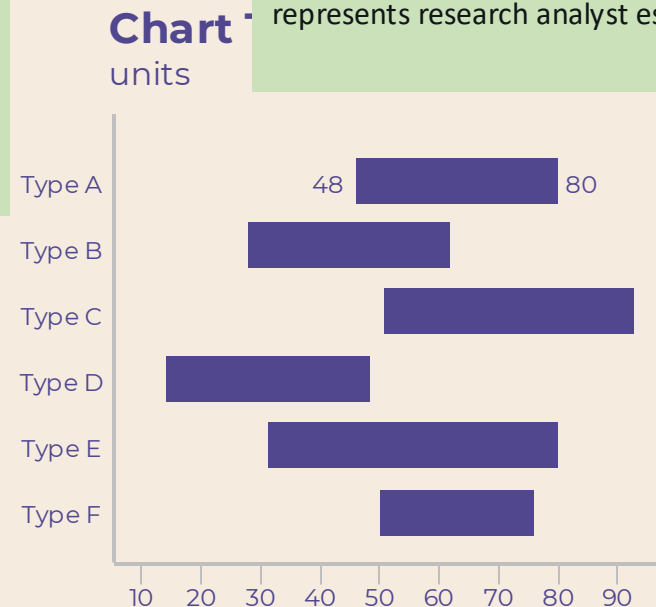
Used when you want to show how data is 'spread out', for example as a normal distribution or bell curve (spread in the middle) or towards the far edges. The bars in the distribution represent the logical groupings of data (a line distribution can be used if the data set is large).



2

### Football field chart:

Used to show low and high prices for different methodologies, for example prices in type A represent ratio analysis, type B represent DCF analysis, type C represents research analyst estimates.

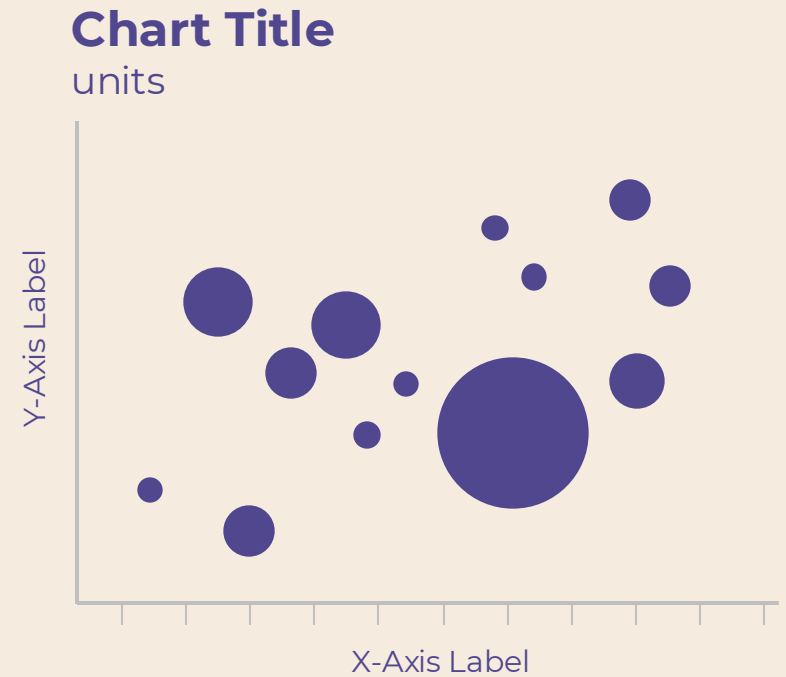
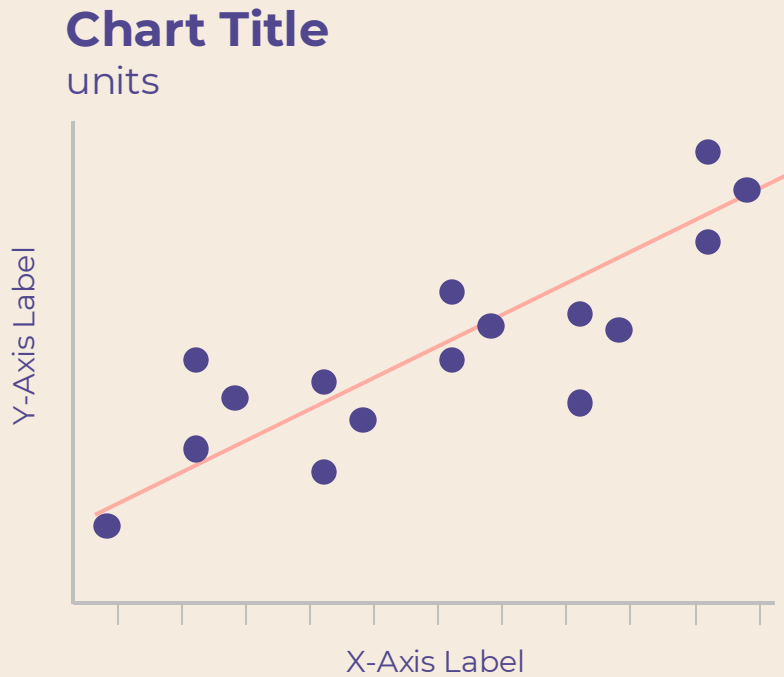


# Scatter

## ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

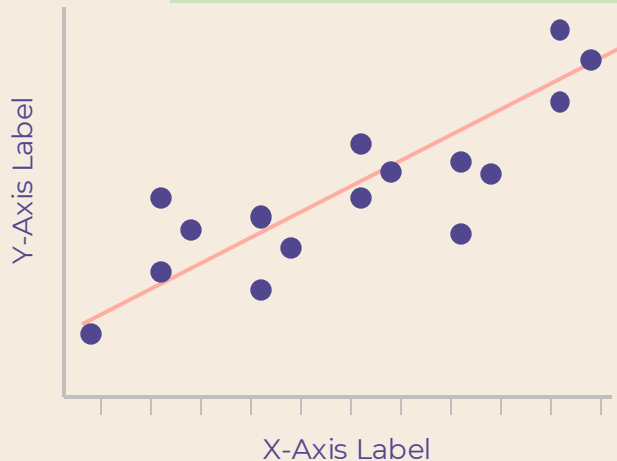


# Scatter

## ANALYSE

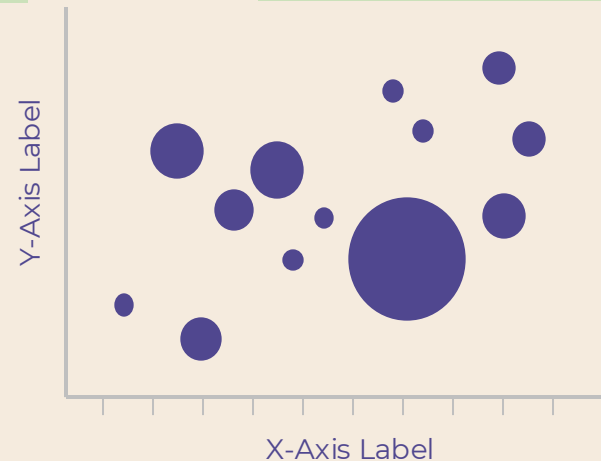
### Scatter dot chart

Used to display data represented by two variables (x-axis and y-axis). This is used when you want to see if there is a relationship between those 2 variables, for example if the dots are clustered around a tight line there is a strong relationship.



### Bubble chart

Used to display data represented by two variables (x-axis and y-axis) and also introduces a third variable (size of the bubble). Used to show where one company or product exists in context of competitors and other products.



# Cumulative

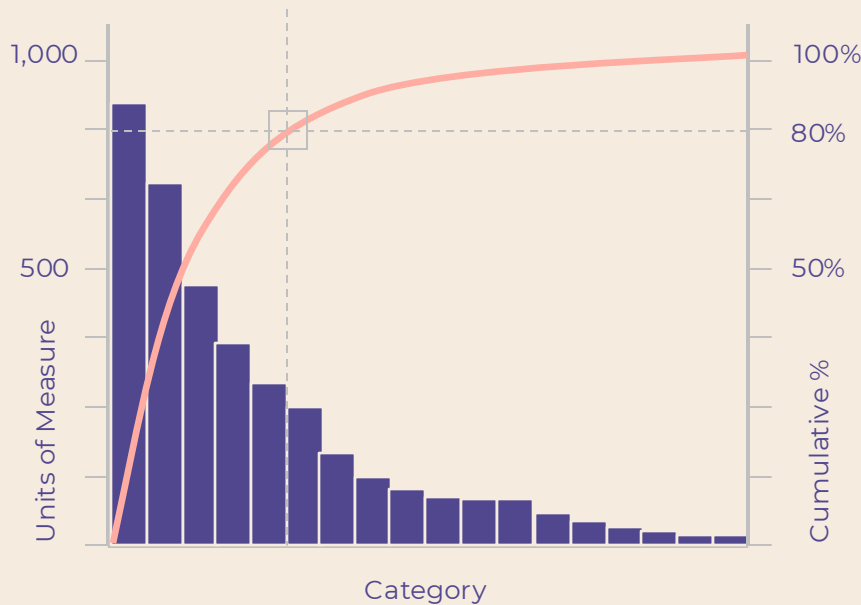
## ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

### Chart Title

cumulative % curve



X% of **[Category]**  
contributes Y% of  
**[Units of Measure]**

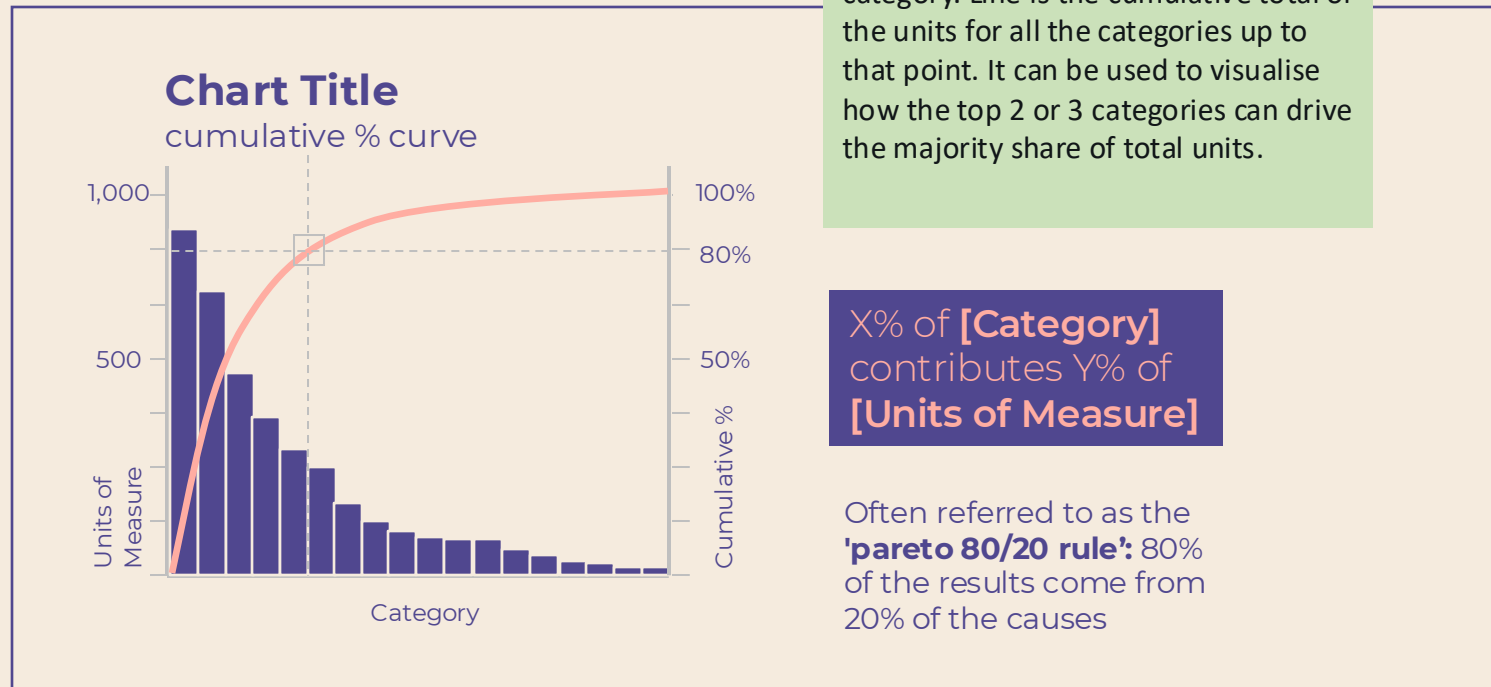
Often referred to as the  
**'pareto 80/20 rule'**: 80% of  
the results come from 20% of  
the causes

# Cumulative

## ANALYSE

### Cumulative bar/line chart

Cumulative chart shows build up in total units by category (or time). Bars are the units for the individual category. Line is the cumulative total of the units for all the categories up to that point. It can be used to visualise how the top 2 or 3 categories can drive the majority share of total units.

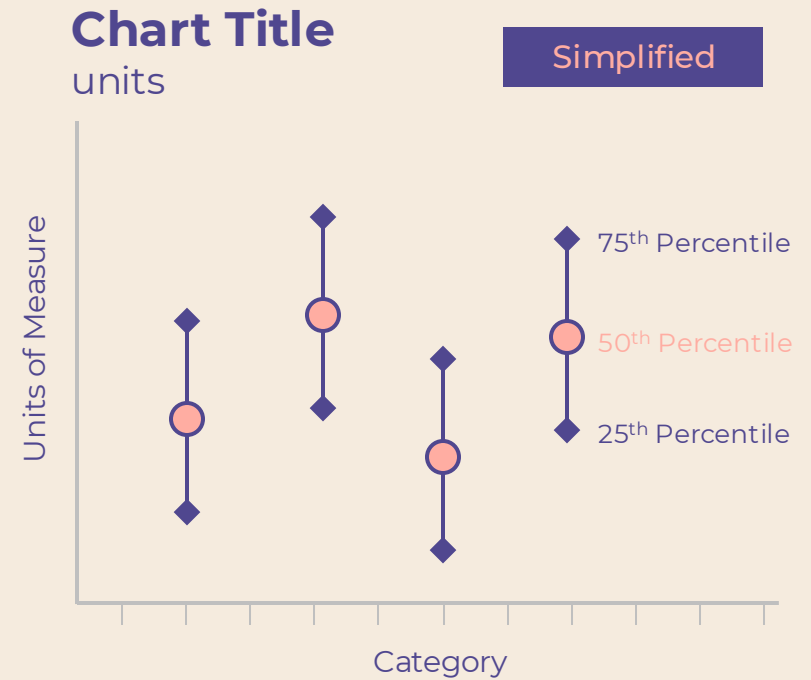
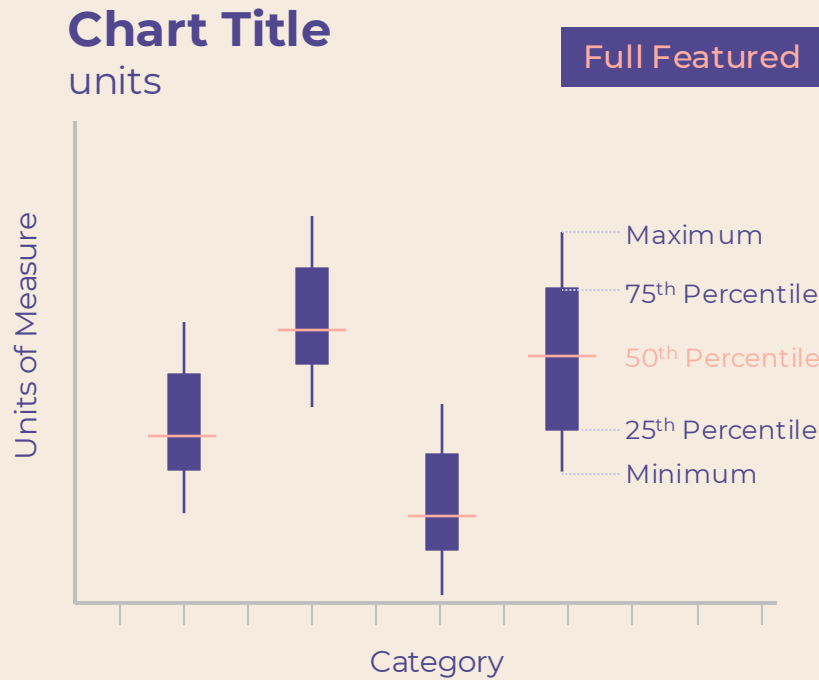


# Candlestick

## ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK



# Candlestick

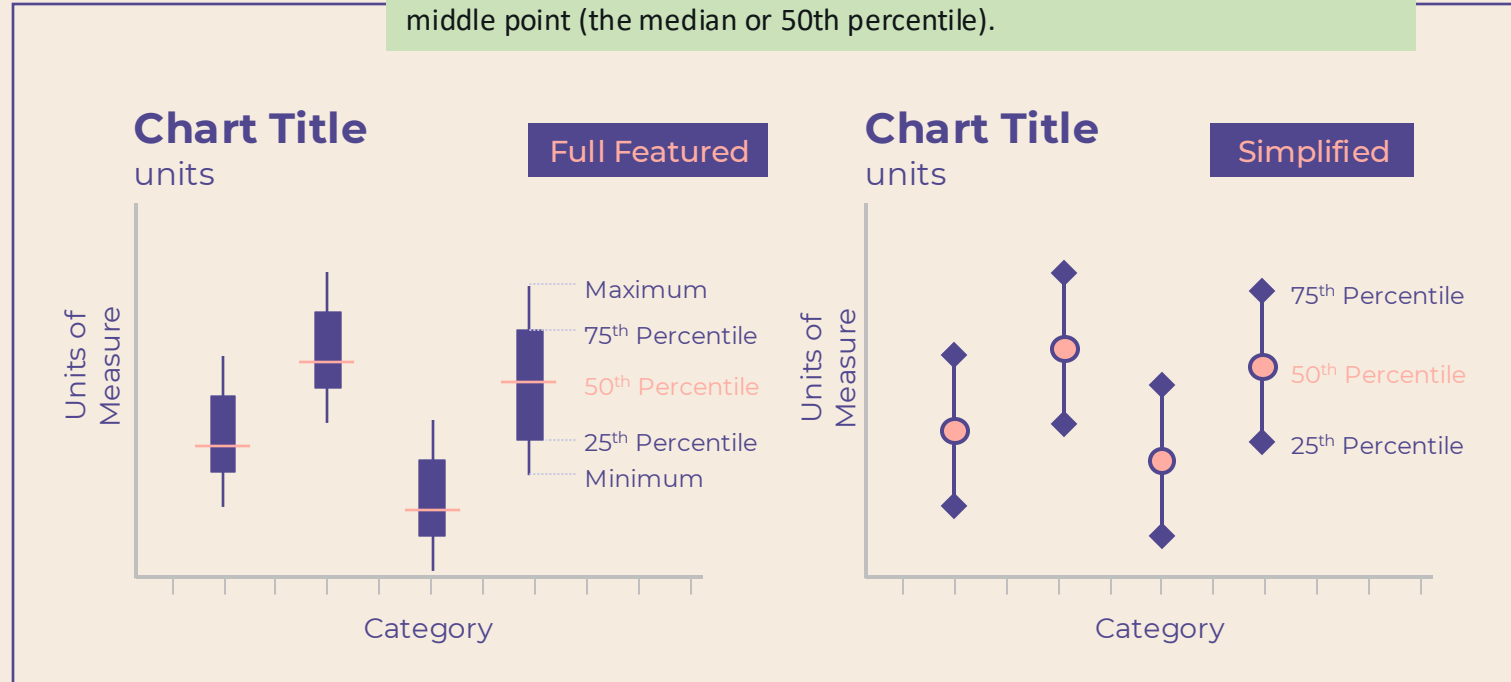
## ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS

### Candlestick chart

Used to display highs and lows of a category of data, typically the max low or high (bottom and top wicks), the bar (for 25<sup>th</sup> and 75<sup>th</sup> percentiles, and a middle point (the median or 50<sup>th</sup> percentile).

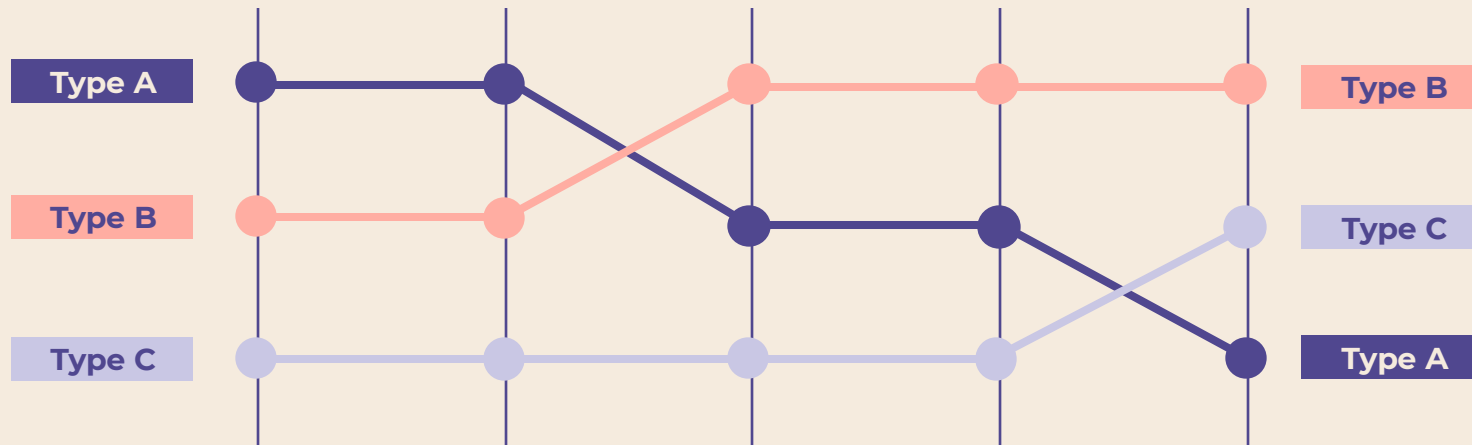




# Rank ANALYSE

OVERNIGHT STRATEGIST

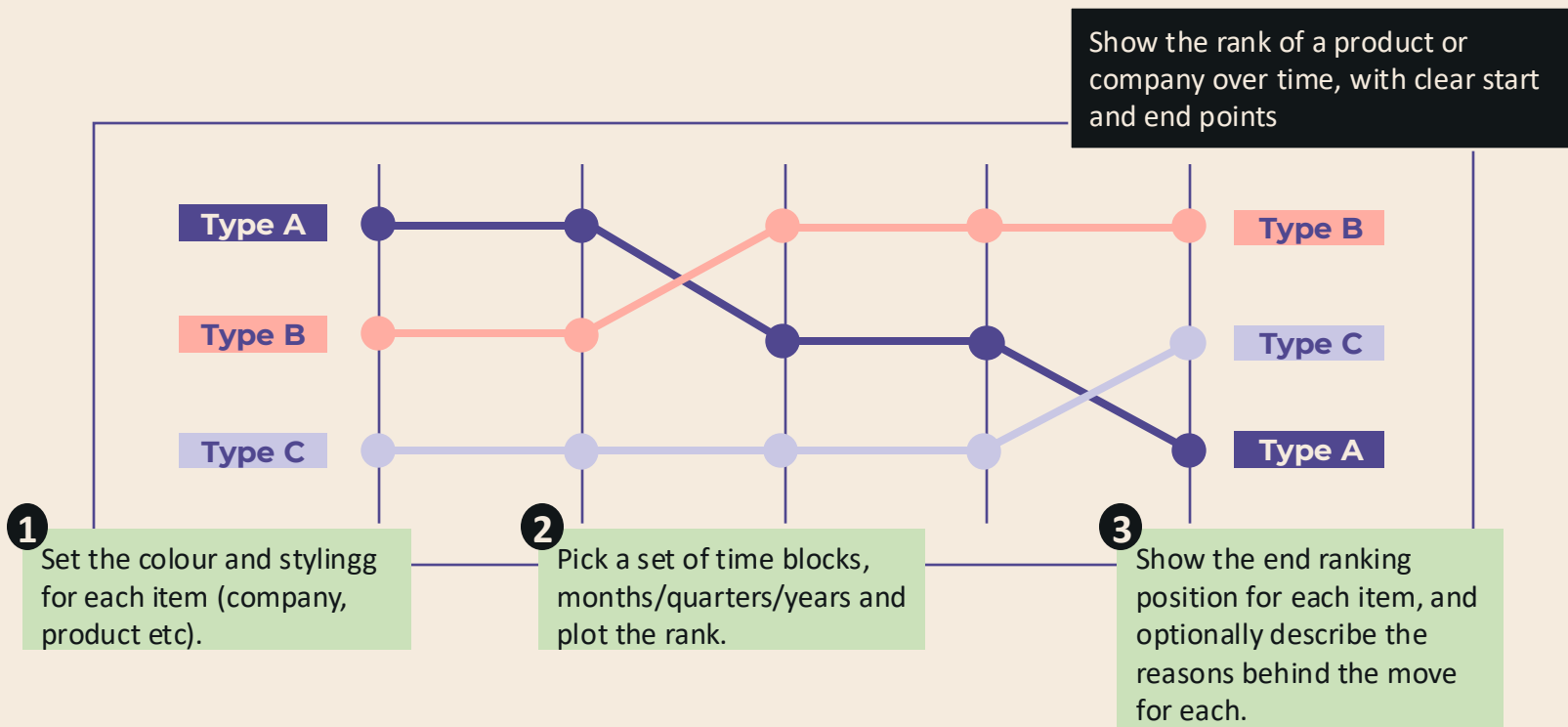
FRAMEWORK



# Rank ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS



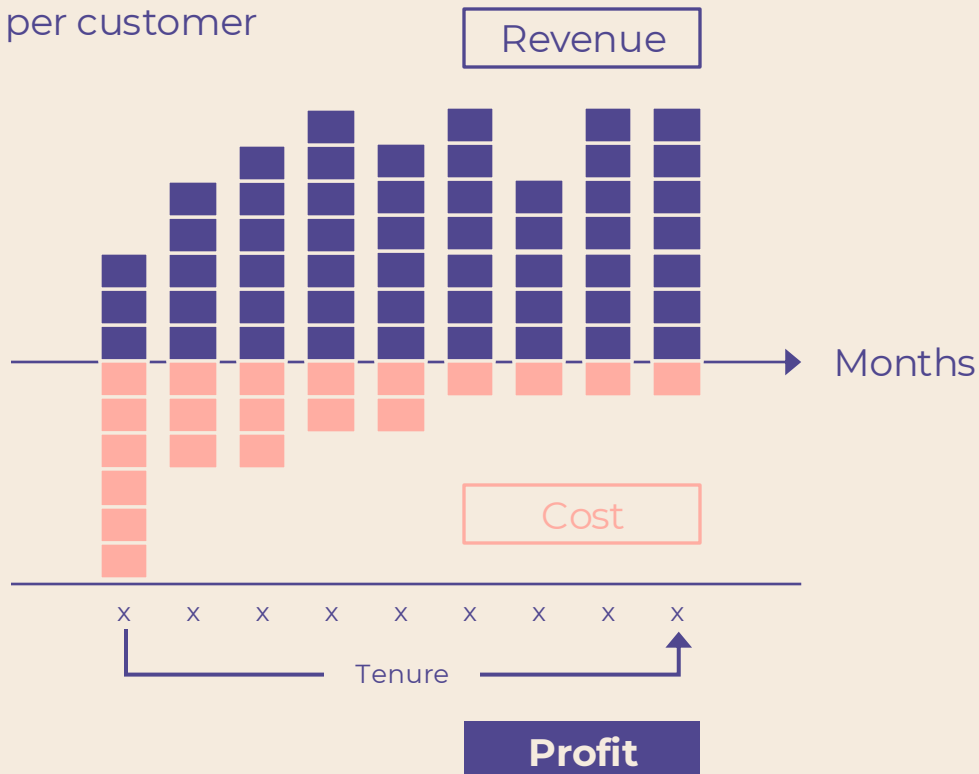
# Unit Economics

## ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

**Dollars \$**  
per customer



**LTV**  
Lifetime Value

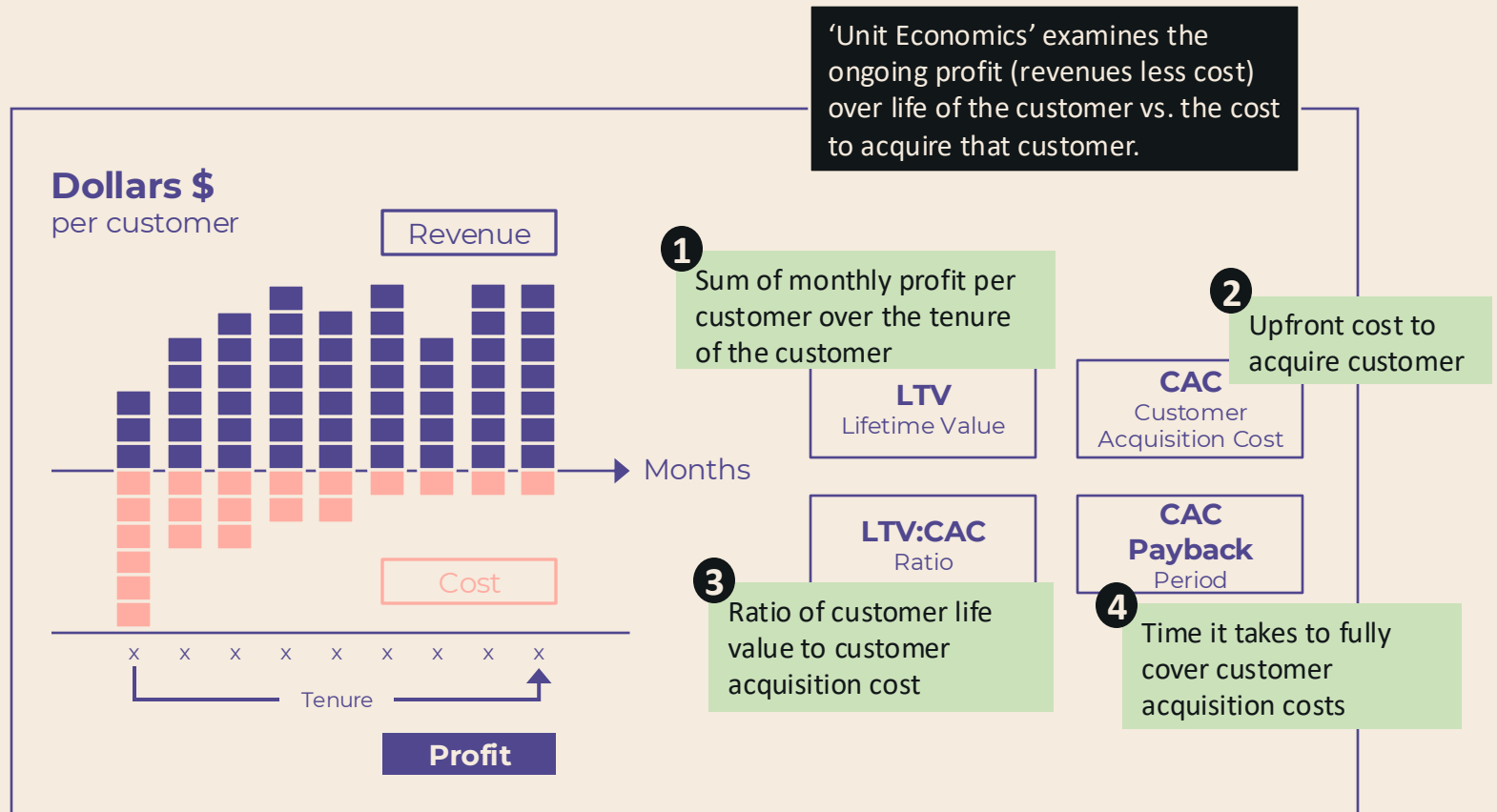
**CAC**  
Customer  
Acquisition Cost

**LTV:CAC**  
Ratio

**CAC Payback**  
Period

# Unit Economics

## ANALYSE



# Waterfall

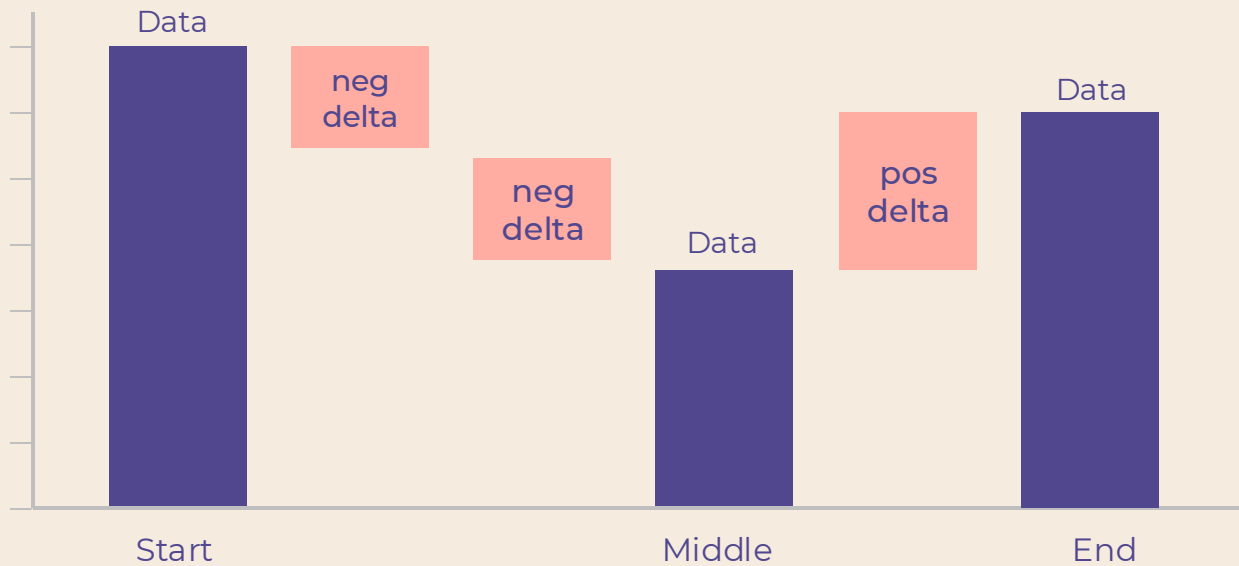
## ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

Chart Title

units

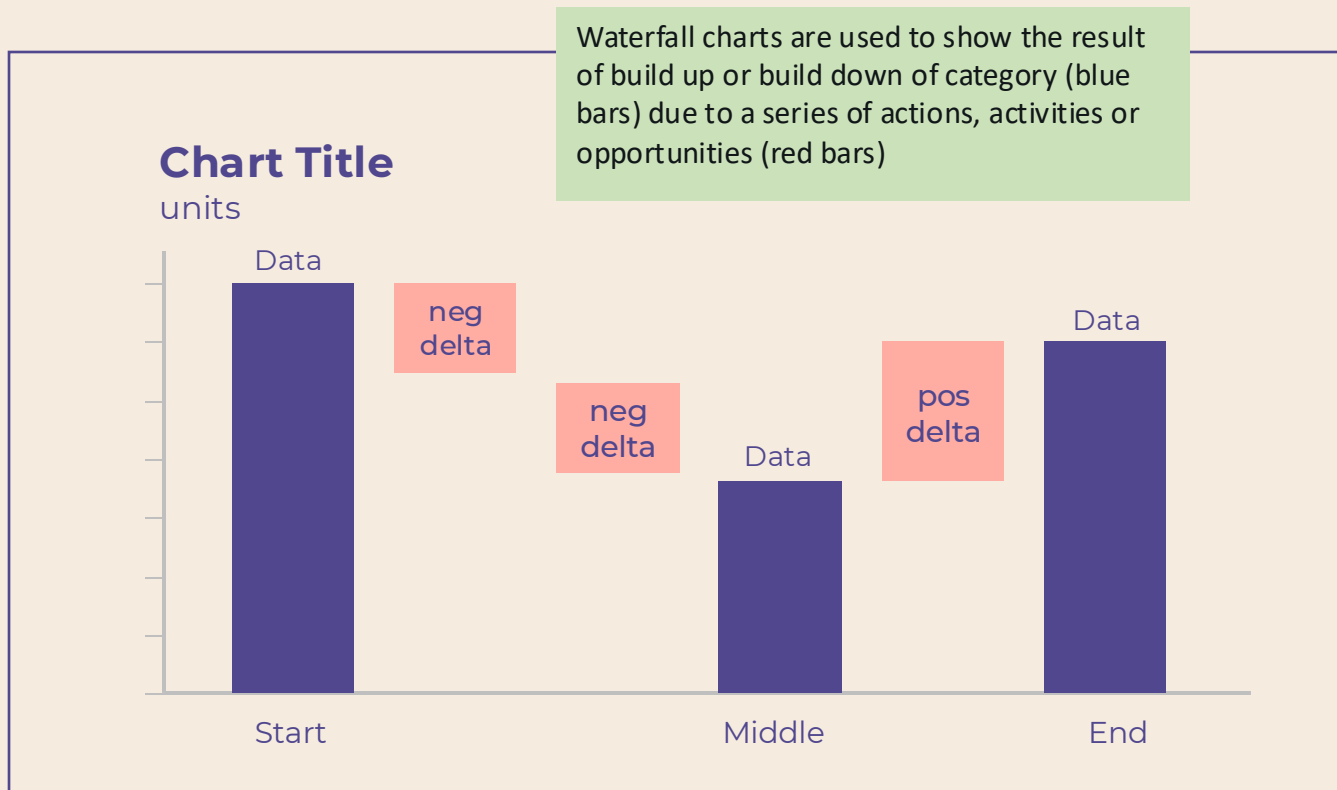


# Waterfall

## ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS



# Marginal Return

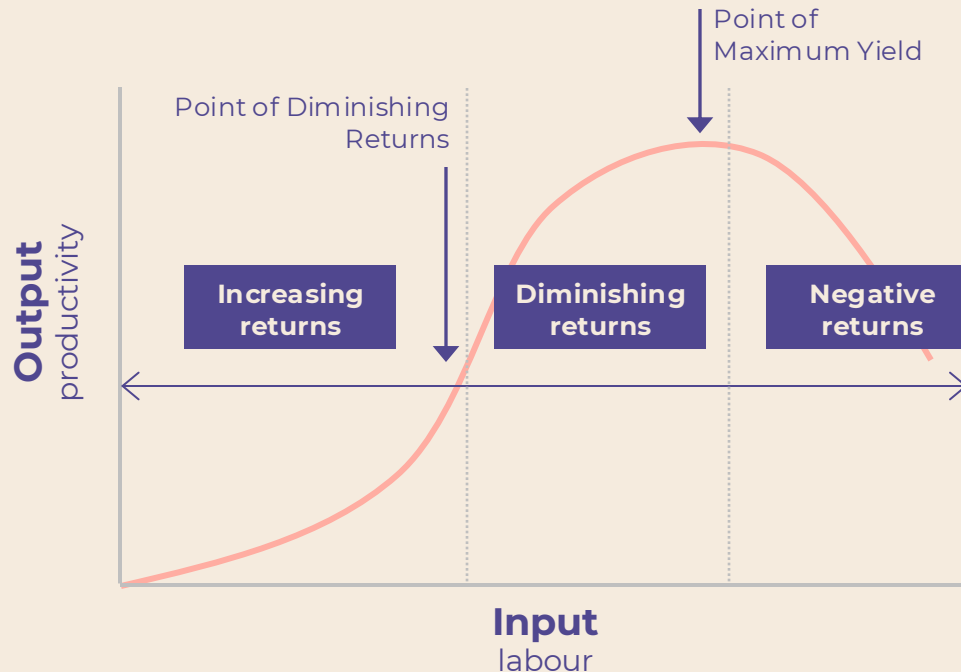
## ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

### Law of diminishing returns

input vs. output



# Marginal Return

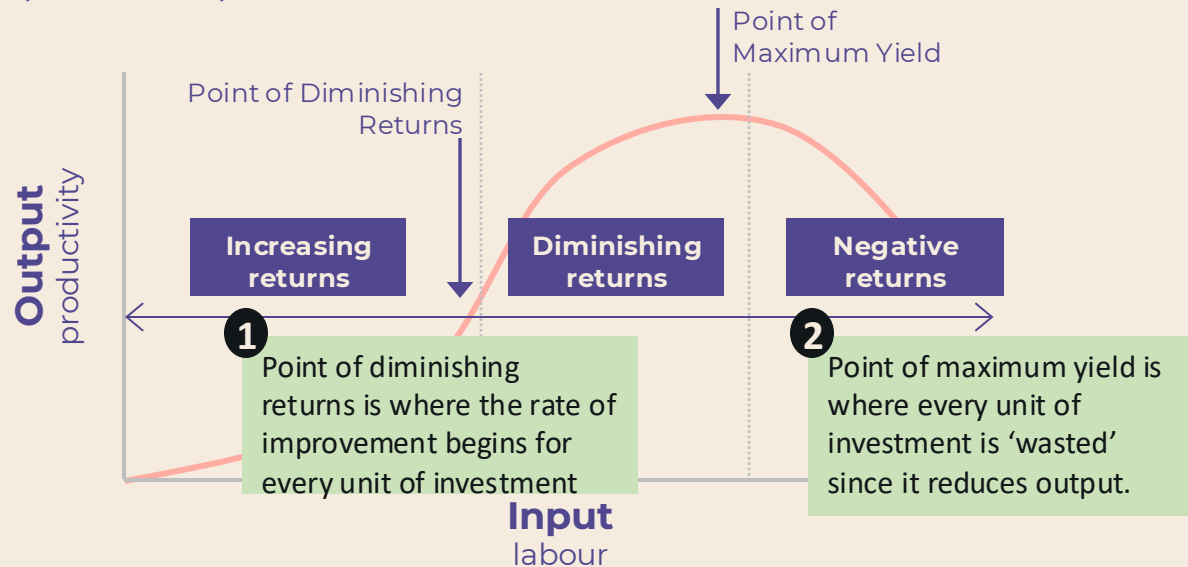
## ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS

'Law of diminishing returns' is a principle that describes a point where continued investment yields less (or no) improvement

### Law of diminishing returns input vs. output



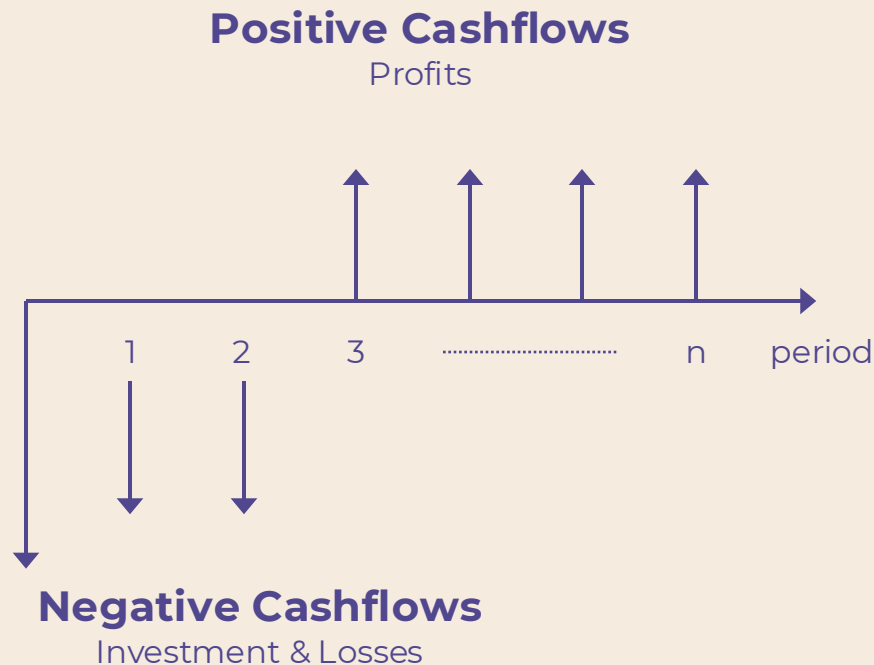


# Cashflow

## ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK



### NPV

Net present value

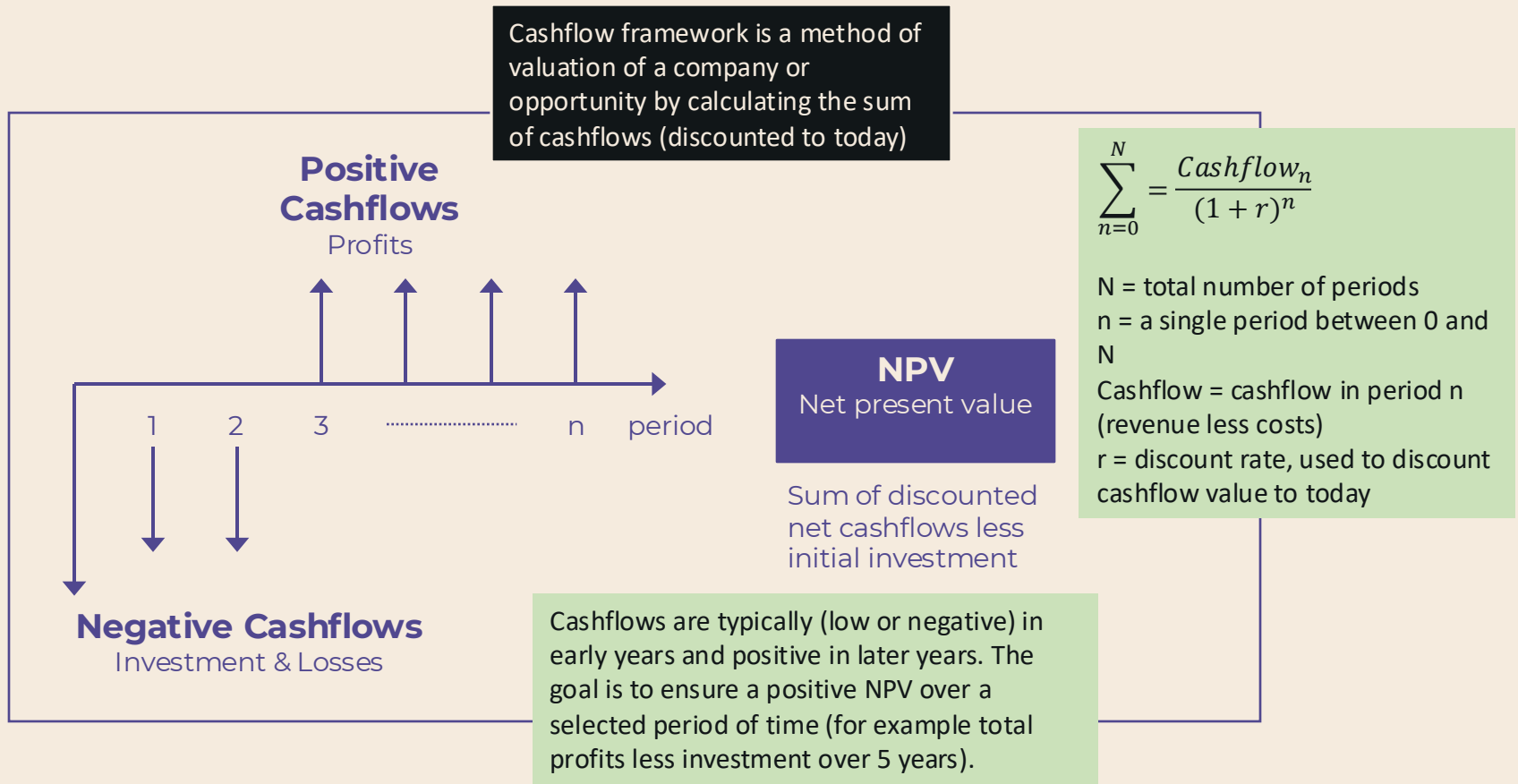
Sum of discounted  
net cashflows less  
initial investment

# Cashflow

## ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS

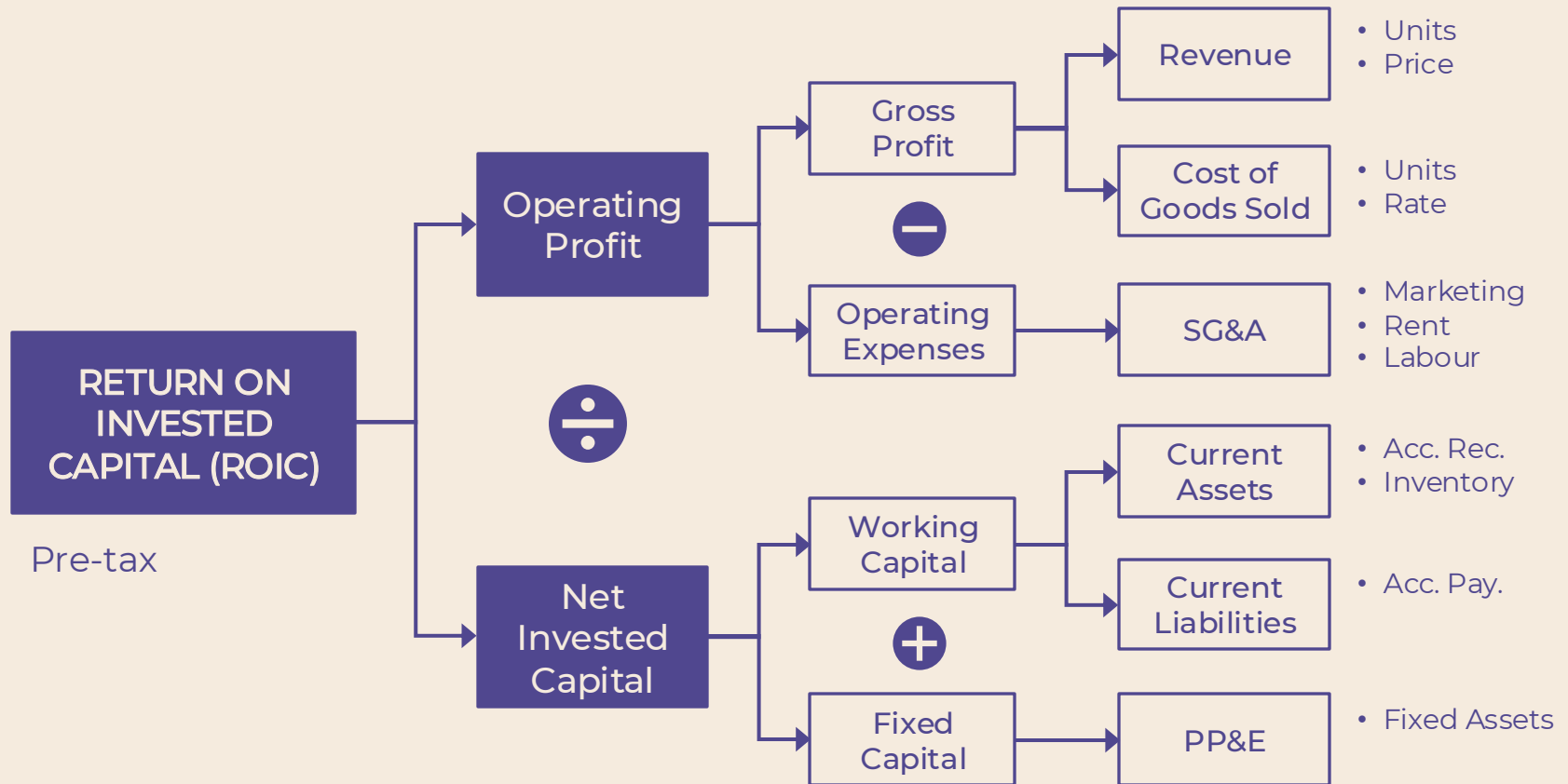


# ROIC

## ANALYSE

OVERNIGHT STRATEGIST

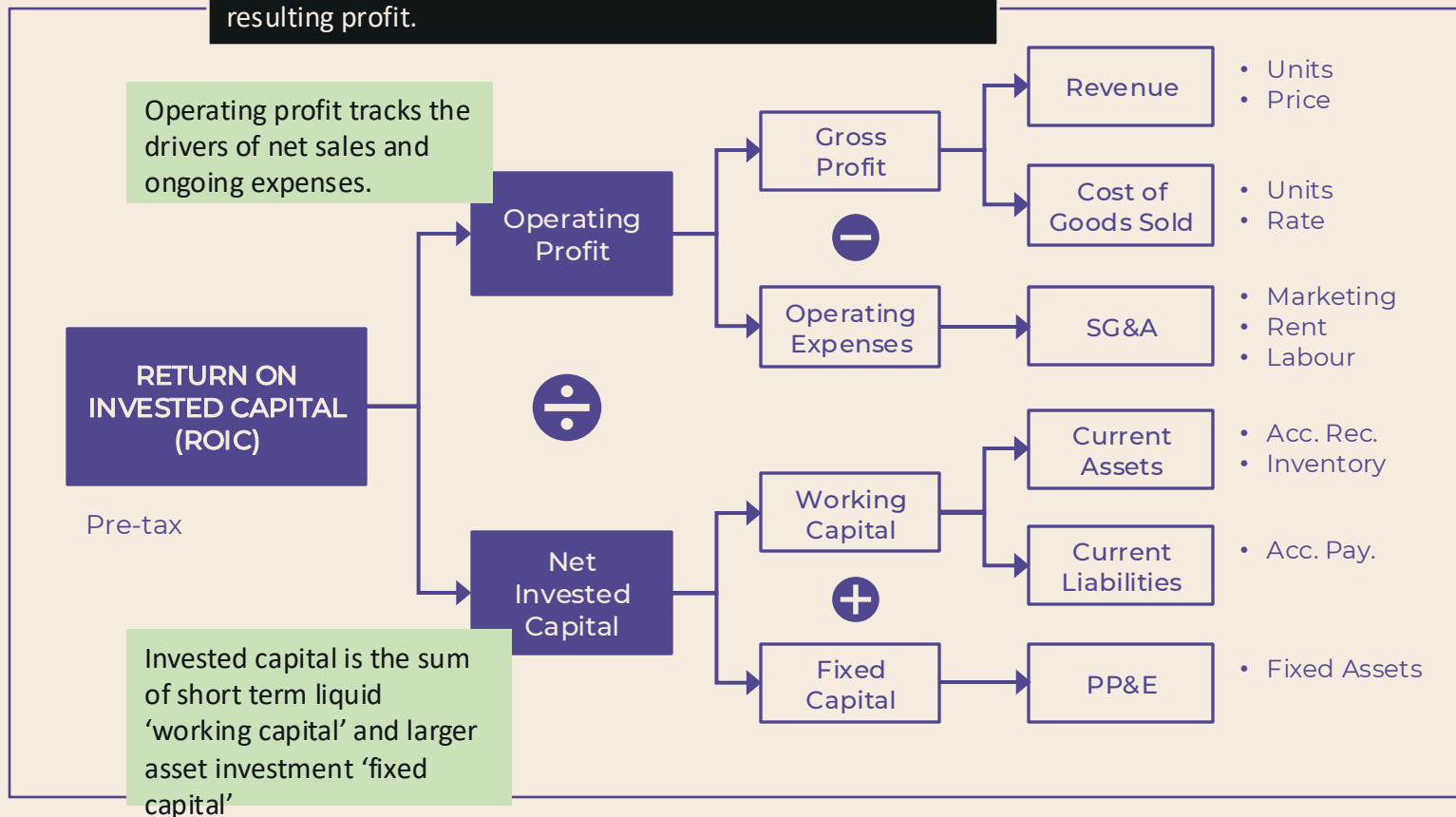
FRAMEWORK



# ROIC

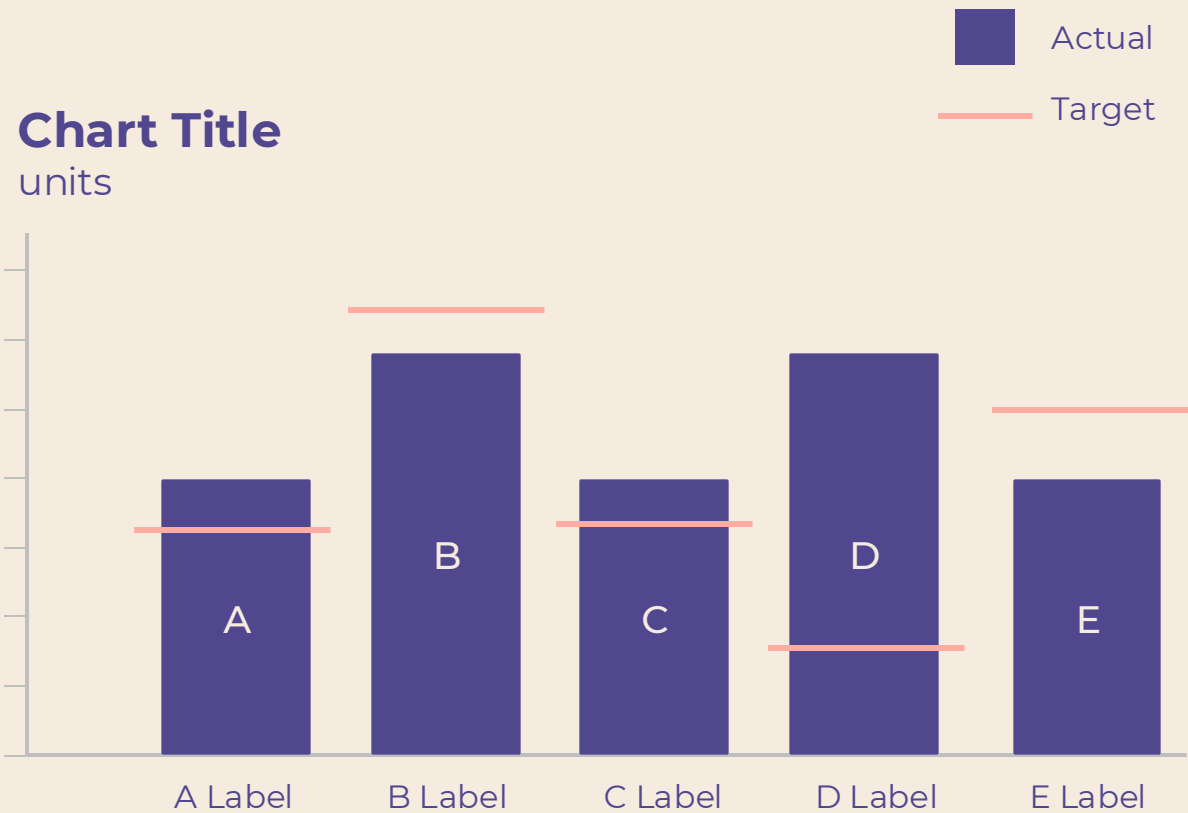
## ANALYSE

Return on invested capital (ROIC) is a method to evaluate performance of a business and its growth levers. It measures how efficient a business is at investing its capital by reviewing the relationship between a dollar invested and its resulting profit.



# Actual v Target

## ANALYSE

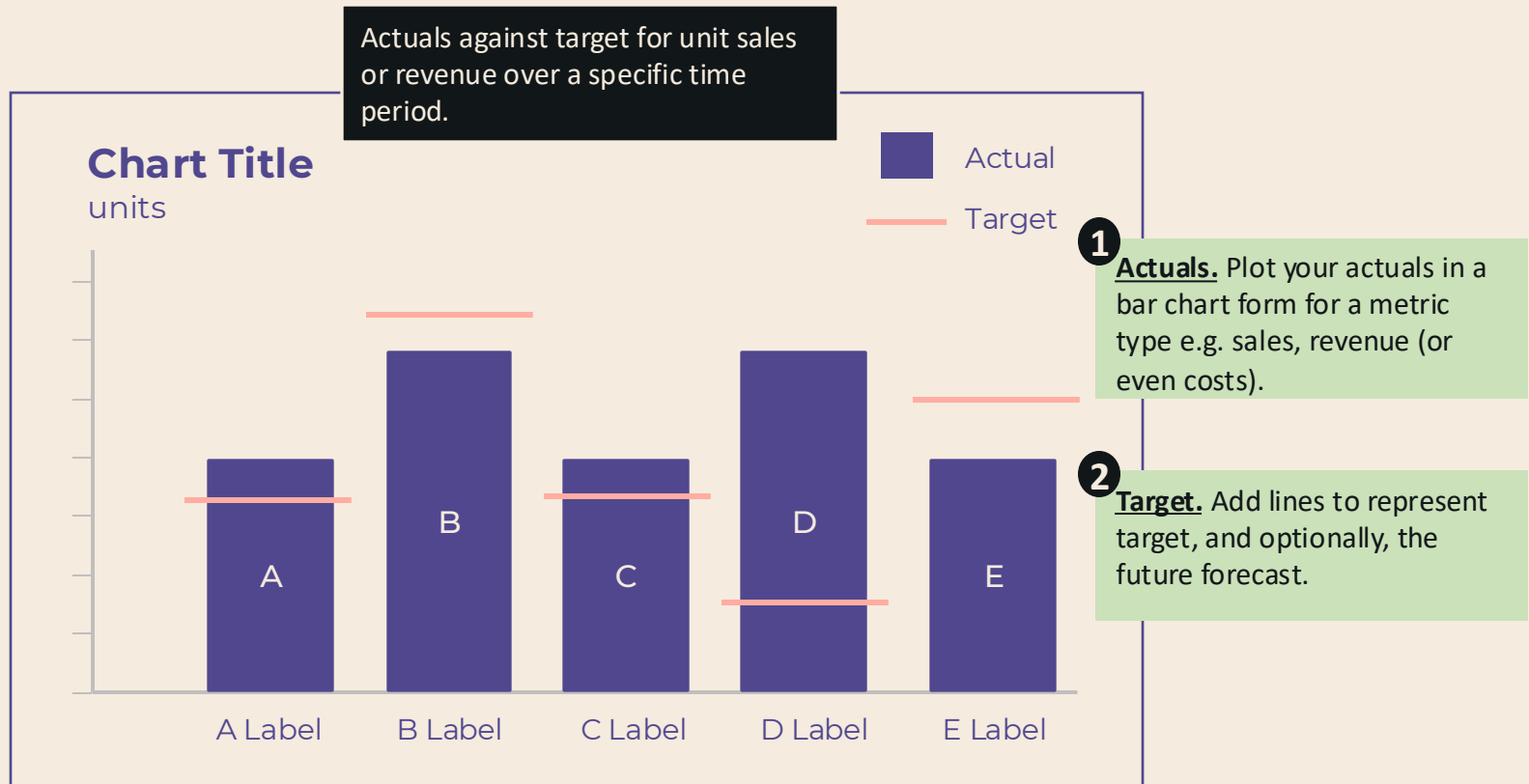


# Actual v Target

## ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS



# Profit Margin

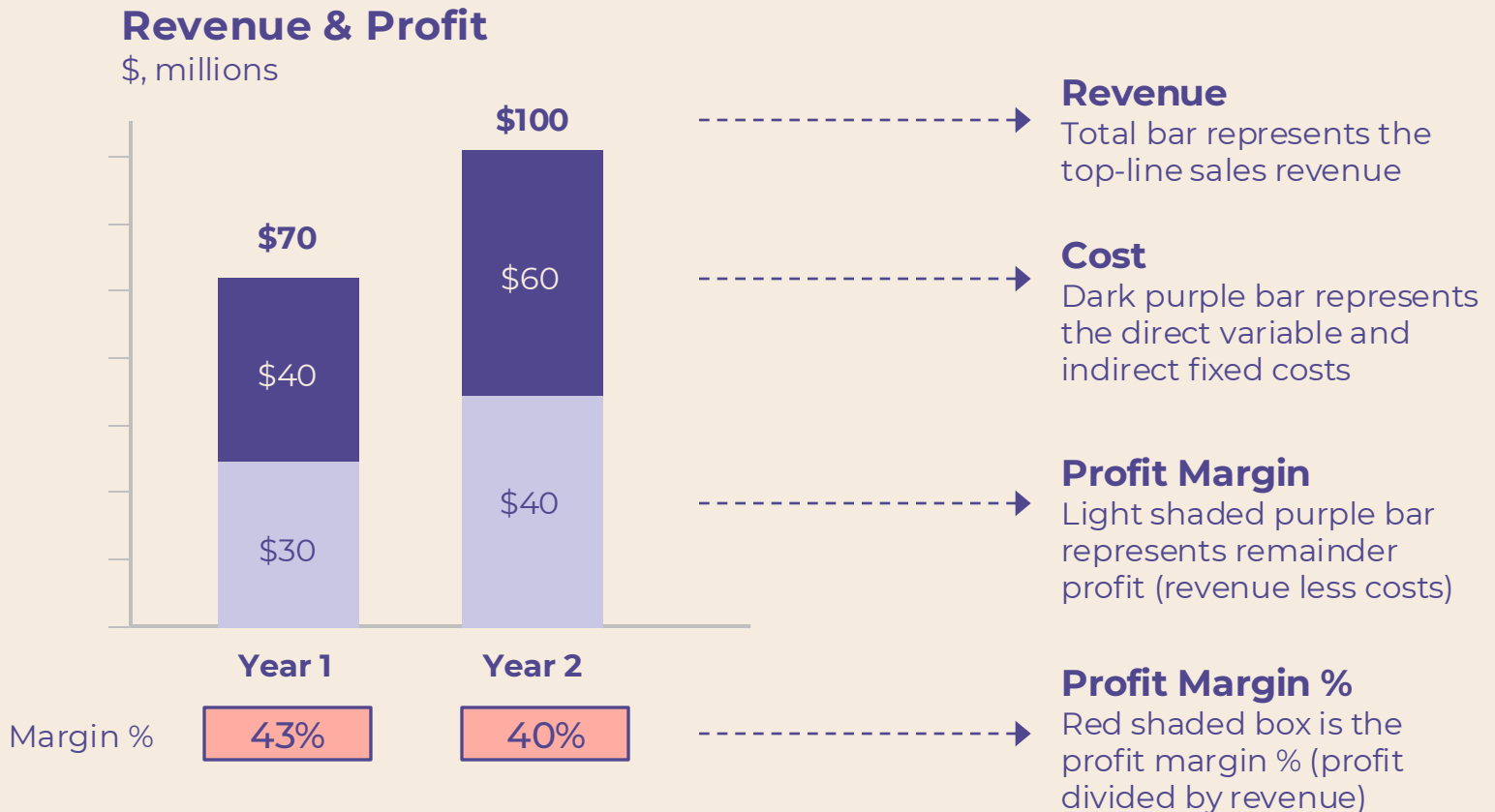
## ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

+

INSTRUCTIONS

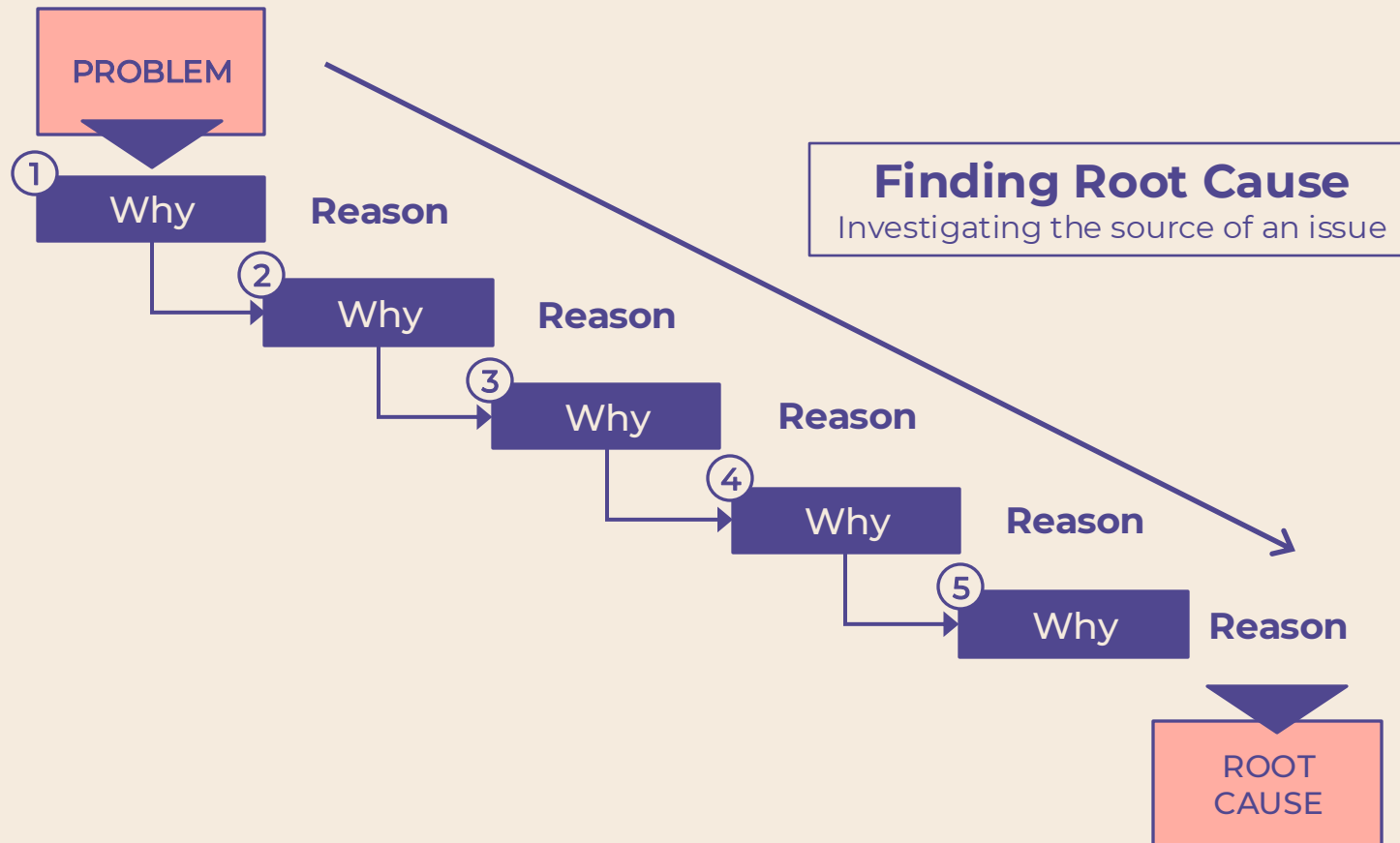


# 5 Why's

## ANALYSE

OVERNIGHT STRATEGIST

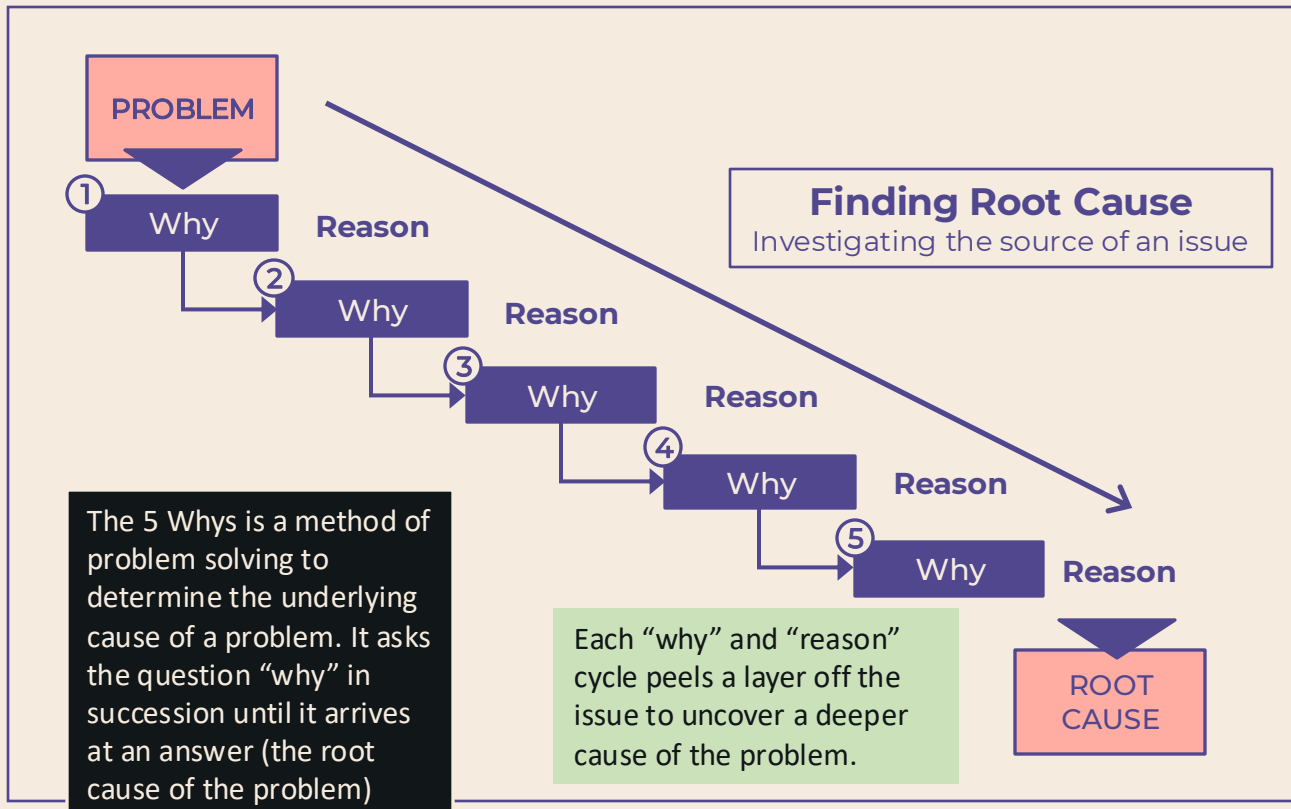
FRAMEWORK





# 5 Why's

## ANALYSE

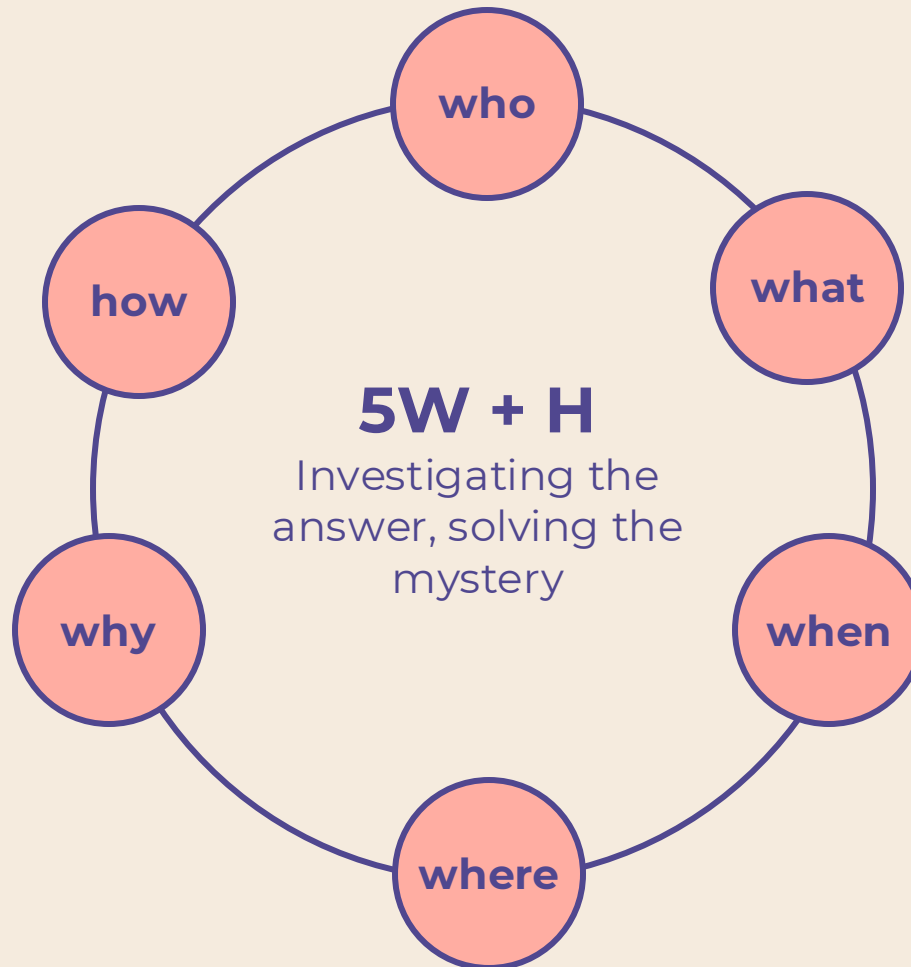


# 5W + H

## ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

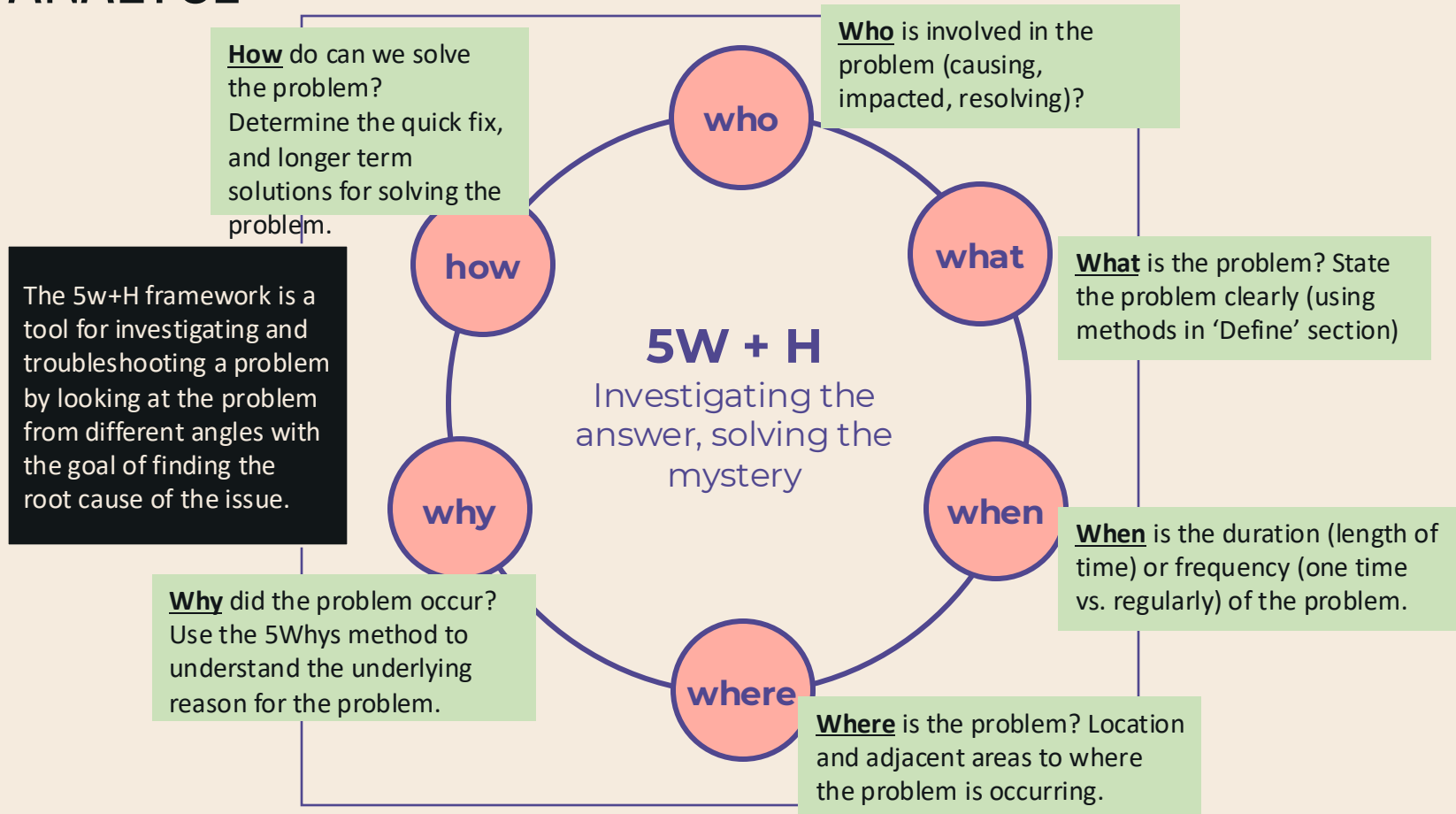


# 5W + H

## ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS



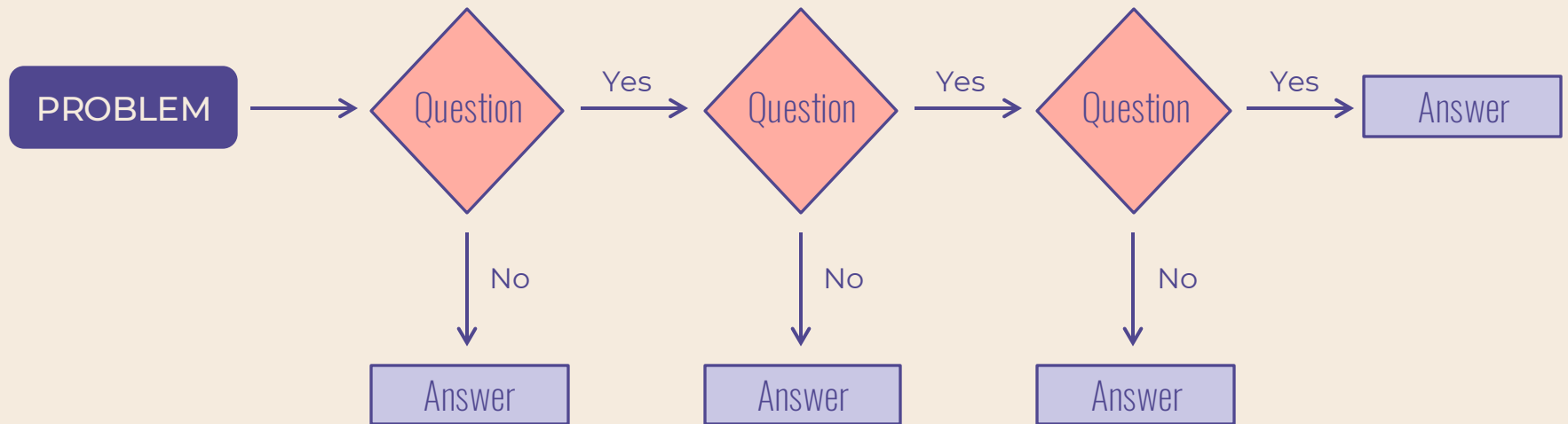
# Yes/No

## ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

### Yes/No Flowchart



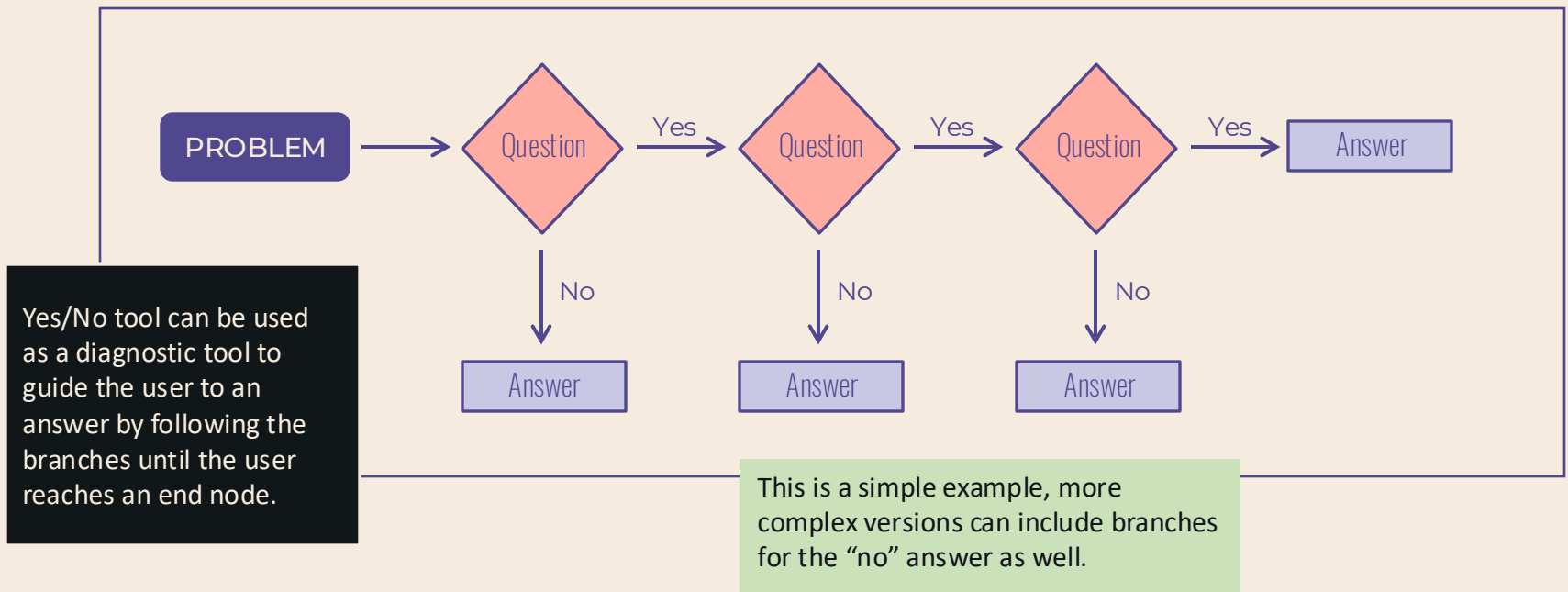
# Yes/No

## ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS

### Yes/No Flowchart

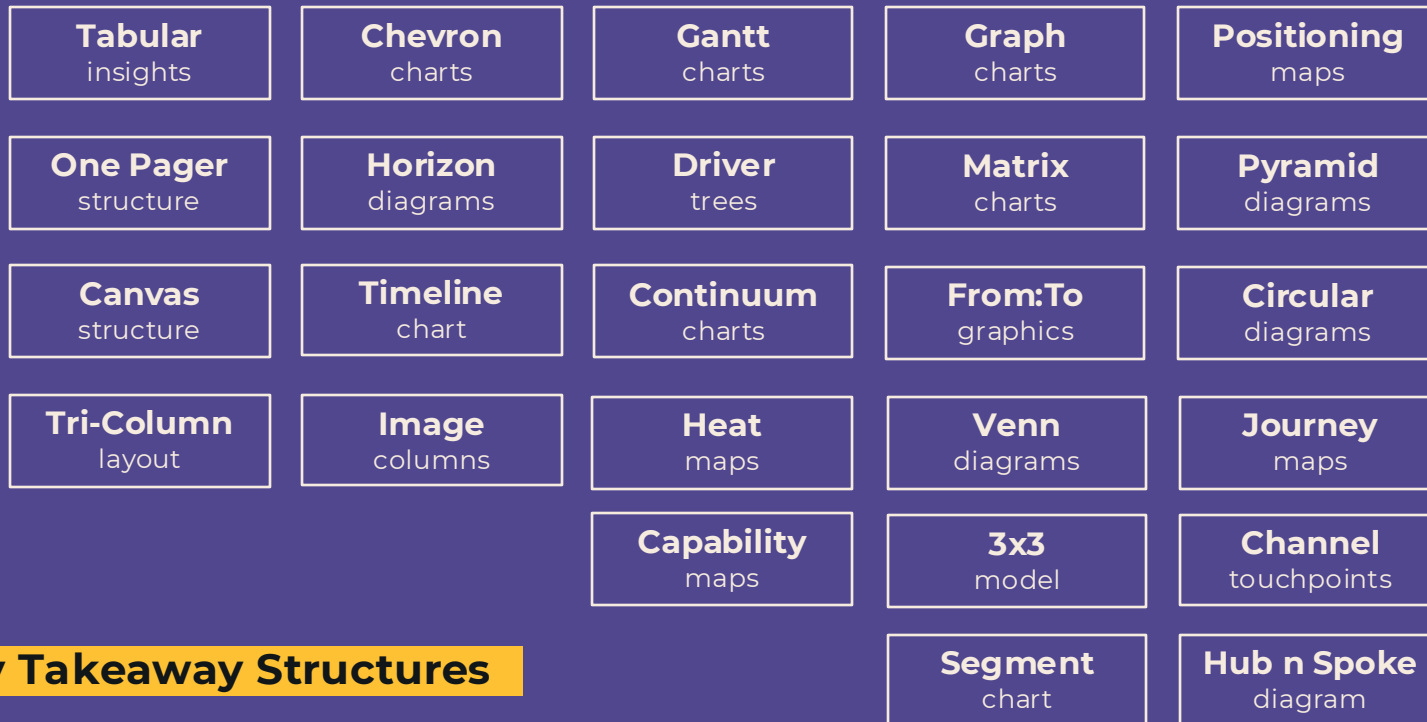


# Insight

OVERNIGHT STRATEGIST

Text

Diagram



**Key Takeaway Structures**

# Tabular

## INSIGHT

		Description	Impact	Takeaway
Category	Sub-category	Description	HIGH	• Comment
	Sub-category	...	MED	• ...
	Sub-category	...	LOW	• ...
Category	Sub-category	Description	HIGH	• Comment
	Sub-category	...	MED	• ...
	Sub-category	...	LOW	• ...

# Tabular

## INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS

**1** Break insights down into logical groups (and sub-groups if relevant)

**2** Provide setup and implication information for the audience.

**3** Describe the 'so what' and takeaway insights of the data.

		Description	Impact	Takeaway
Category	Sub-category	Description	HIGH	• Comment
	Sub-category	...	MED	• ...
	Sub-category	...	LOW	• ...
	Sub-category	Description	HIGH	• Comment
	Sub-category	...	MED	• ...
	Sub-category	...	LOW	• ...

The table or grid format is the bread butter type page for insights. You can usually default to a similar style if you need to structure your takeaways



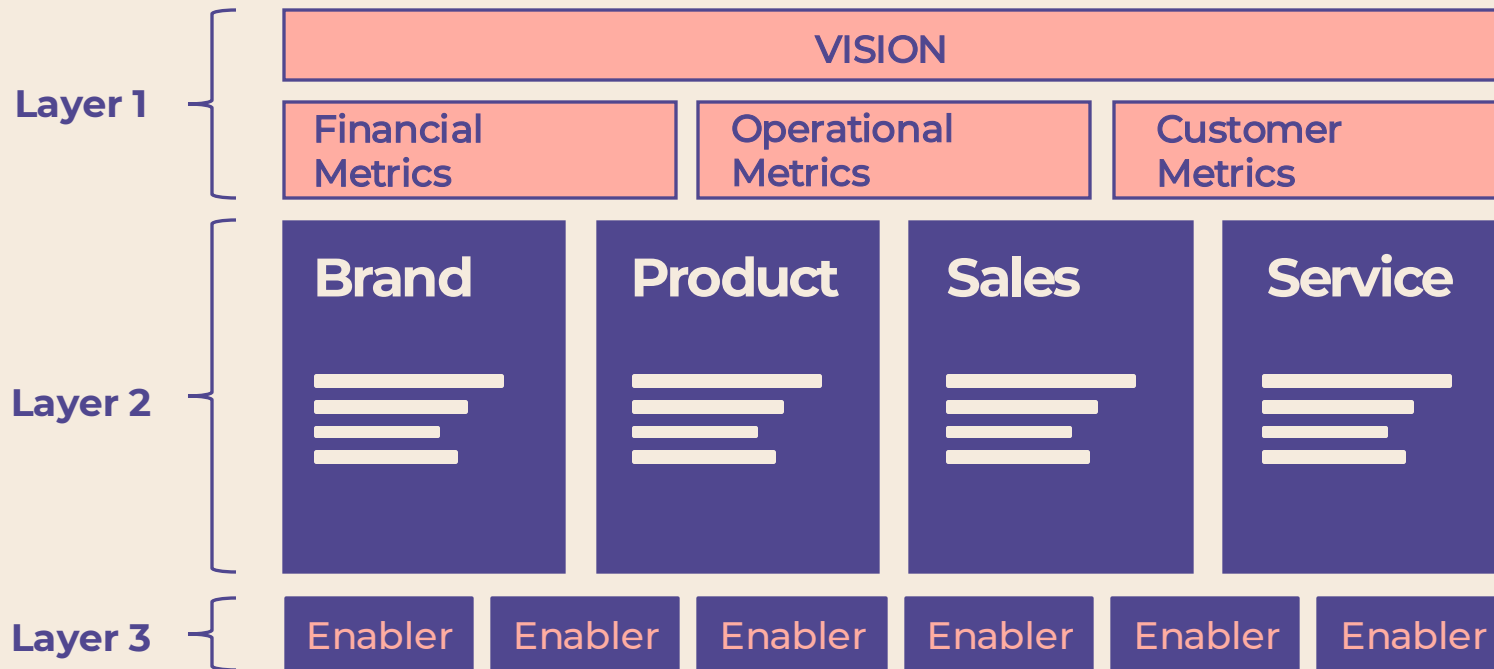
# One Pager

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### 'Business Strategy On-A-Page' Example



# One Pager

## INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS

The one pager is a common layout to summarise the strategy and is meant to act as part of a full document or a standalone quick reference of your strategy.

### 'Business Strategy On-A-Page' Example

1

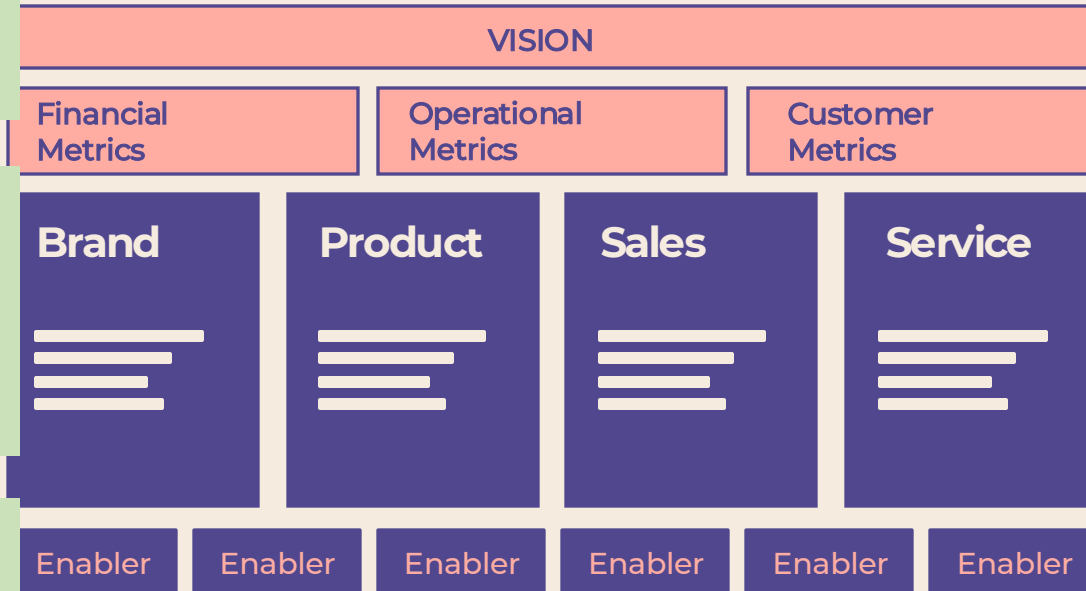
**Layer 1:** Groups the headline goals of the strategy including your vision and key metrics/targets.

2

**Layer 2:** The 'pillars' of the strategy contain your selected 3 to 5 imperatives that build up to and help you deliver on your vision. This should also contain the specific tactics "key projects" that deliver on the strategic imperative.

3

**Layer 3:** The 'enablers' of the strategic pillar contain the key tech or process capabilities required to deliver the strategy.



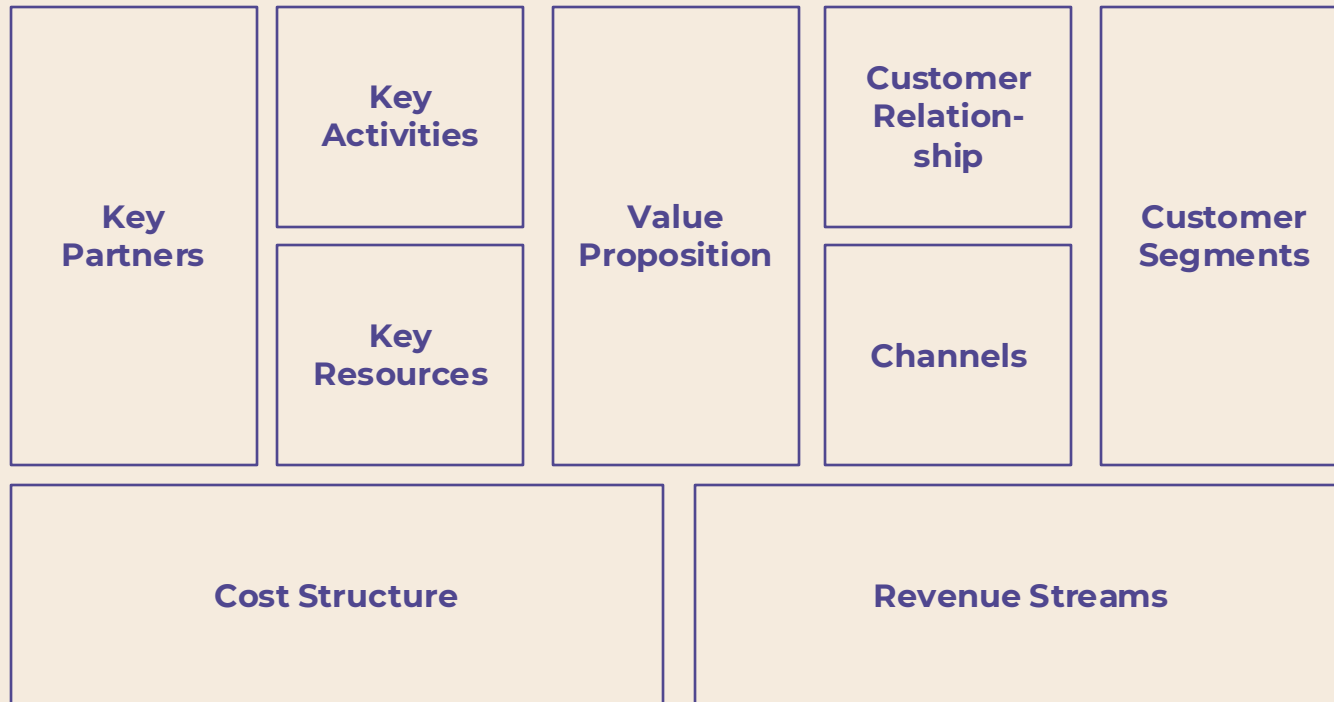
# Canvas

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### 'Business Model Canvas' Example



*Ref. Business Model Generation, A. Osterwalder and Y. Pigneur*

# Canvas

## INSIGHT

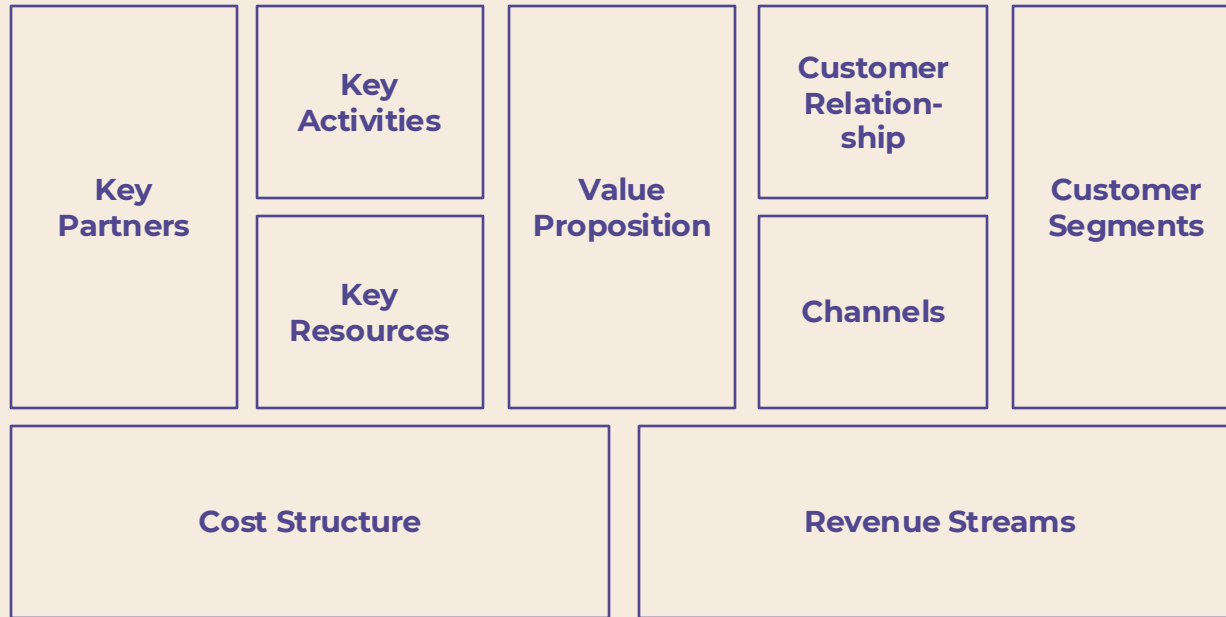
OVERNIGHT STRATEGIST

INSTRUCTIONS

The canvas style layout typically brings the building blocks of a topic together on one page, then each block can be 'double-clicked' in subsequent pages.

### 'Business Model Canvas' Example

Canvas diagrams can be helpful in team activity and workshop sessions so participants can solve each component while seeing the full picture.



*Ref. Business Model Generation, A. Osterwalder and Y. Pigneur*

# Tri-Column

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### Sub-Headline 1...

- Describe the **details of the takeaway** and include any steps, evidence or charts
- ...
- ...



Outcome

### ...Sub-Headline 2

- Describe the **details of the takeaway** and include any steps, evidence or charts
- ...
- ...



Outcome

### ...Sub-Headline 3.

- Describe the **details of the takeaway** and include any steps, evidence or charts
- ...
- ...



Outcome

# Tri-Column

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

The tri-column layout is a bread n' butter type page and useful in any strategy deck. It easily flows from headline to supporting takeaways to evidence to "so what's".

### Sub-Headline 1...

- Describe the **details of the takeaway** and include any steps, evidence or charts
- ...
- ...

Outcome

### ...Sub-Headline 2

- Describe the **details of the takeaway** and include any steps, evidence or charts
- ...
- ...

Outcome

### ...Sub-Headline 3

- Describe the **details of the takeaway** and include any steps, evidence or charts
- ...
- ...

Outcome

**1** Layer 1: The sub-headline is a key away (supporting the slide's main headline) and, optionally, can be in logical sequence from left to right.

**1** Layer 2: The set of supporting points for the sub-headline which can be bullet points, stats or chart visuals.

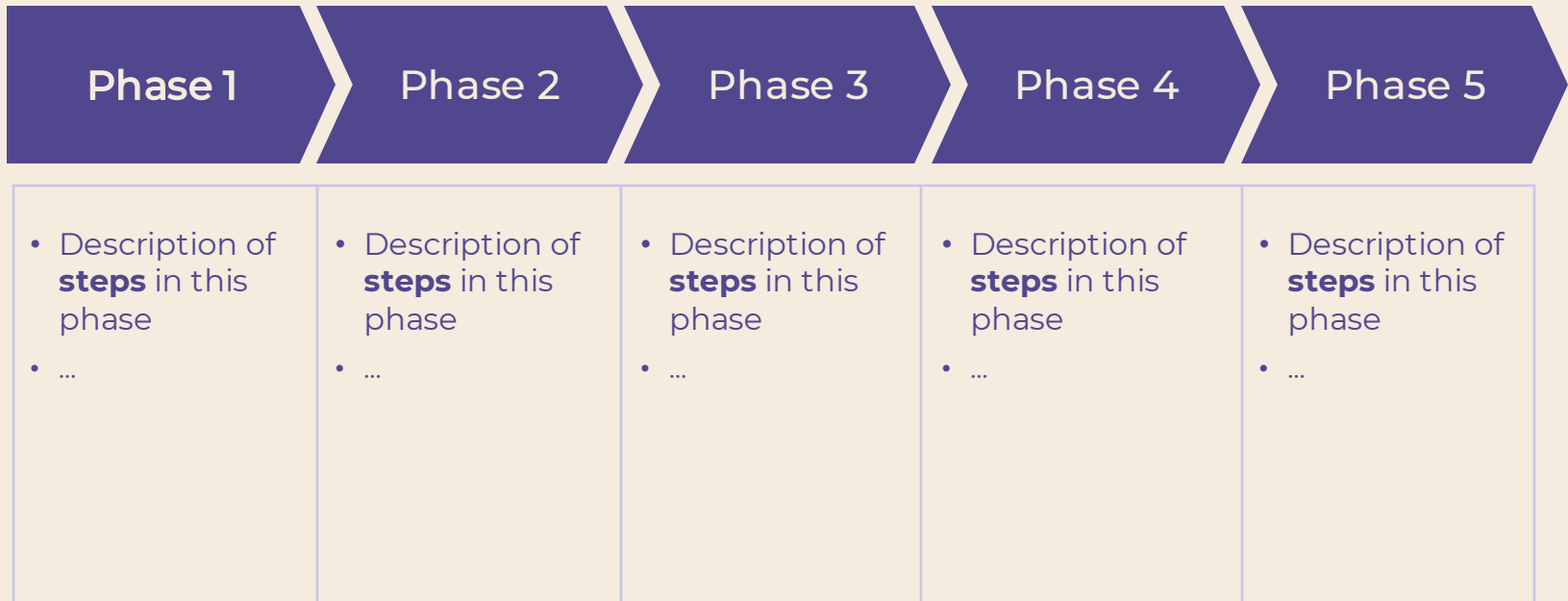
**1** Layer 3: This layer is optional but where possible you should include the "so what" one liner implication of the evidence points.

# Chevron

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK



# Chevron

## INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS

The chevron layout is another bread and butter style page that you can use to visualise the approach and specific steps to solving a problem.

1

**Headline** Headline steps or phases to get you from start to finish.

Phase 2

Phase 3

Phase 4

Phase 5

2

**Detail:** Specific steps in each phase you need to complete.

This can also include “key outcomes” so the audience understands the deliverables the phase creates that enables the move into the next phase.

- Description of steps in this phase

- Description of **steps** in this phase

...

- Description of **steps** in this phase

- ...

- Description of **steps** in this phase

- ...

- Description of **steps** in this phase

- ...



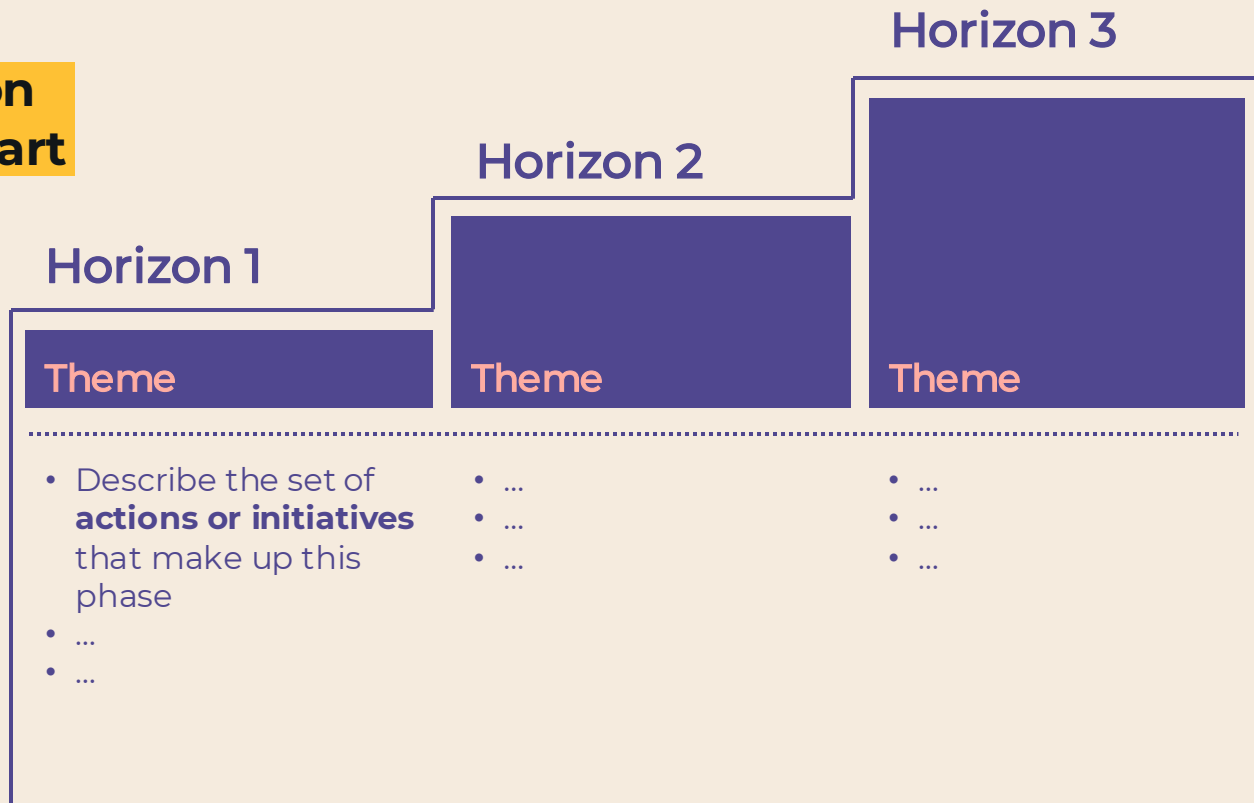
# Horizon

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### 3 Horizon Step Chart



# Horizon

## INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS

The horizon 3 step chart is used to communicate the high level sequence of the strategy. Think of it as a long term, abstracted version of a gantt chart.

### 3 Horizon Step Chart

#### Horizon 1

Theme

- Describe the set of **actions or initiatives** that make up this phase
- ...
- ...

#### Horizon 2

Theme

- ...
- ...
- ...

#### Horizon 3

Theme

- ...
- ...
- ...

1

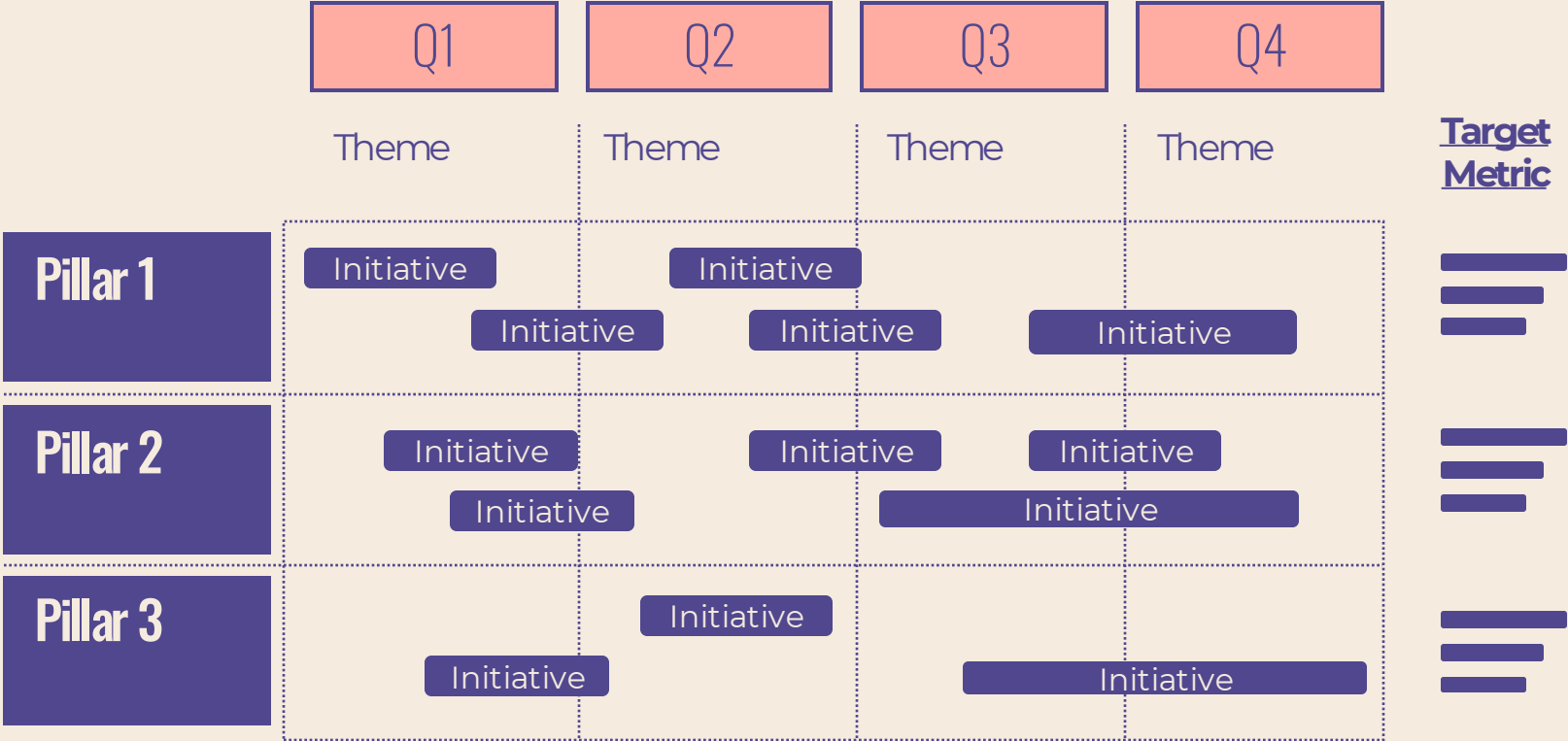
**Horizon.** Bucket your big ideas into logical 3 step path to the end vision and summarise the set of activities in each horizon as a 'theme' (the common thread or headline objective for that horizon).

2

**Detail.** Summarise the bullet point details of actions and initiatives you need to do to progress the horizon level objective.

# Gantt

INSIGHT



# Gantt

## INSIGHT

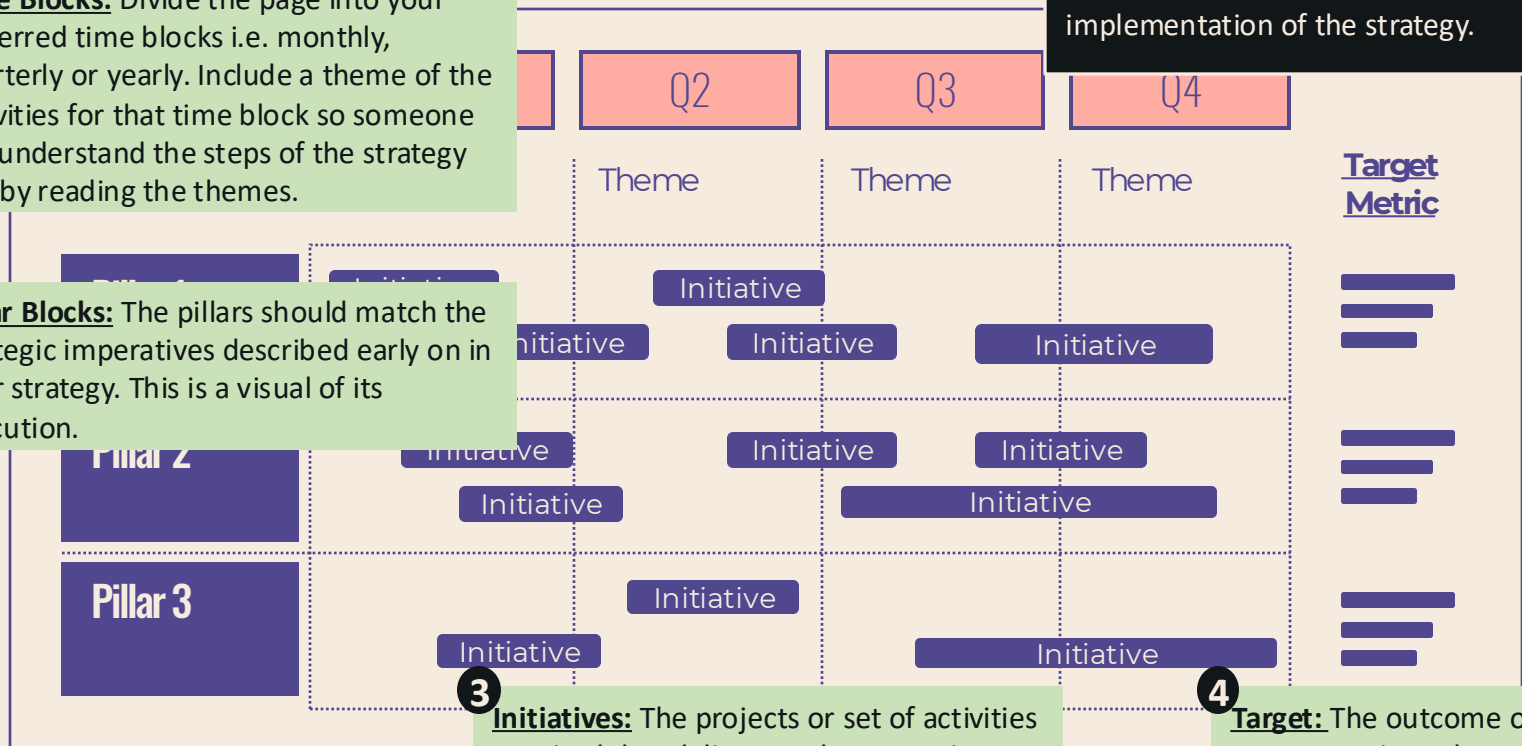
**1 Time Blocks:** Divide the page into your preferred time blocks i.e. monthly, quarterly or yearly. Include a theme of the activities for that time block so someone can understand the steps of the strategy just by reading the themes.

**2 Pillar Blocks:** The pillars should match the strategic imperatives described early on in your strategy. This is a visual of its execution.

**3 Initiatives:** The projects or set of activities required that deliver on the strategic pillar.

**4 Target:** The outcome or target metric each strategic pillar needs to achieve.

The gantt or roadmap layout shows up in most strategy documents to visualise the implementation of the strategy.

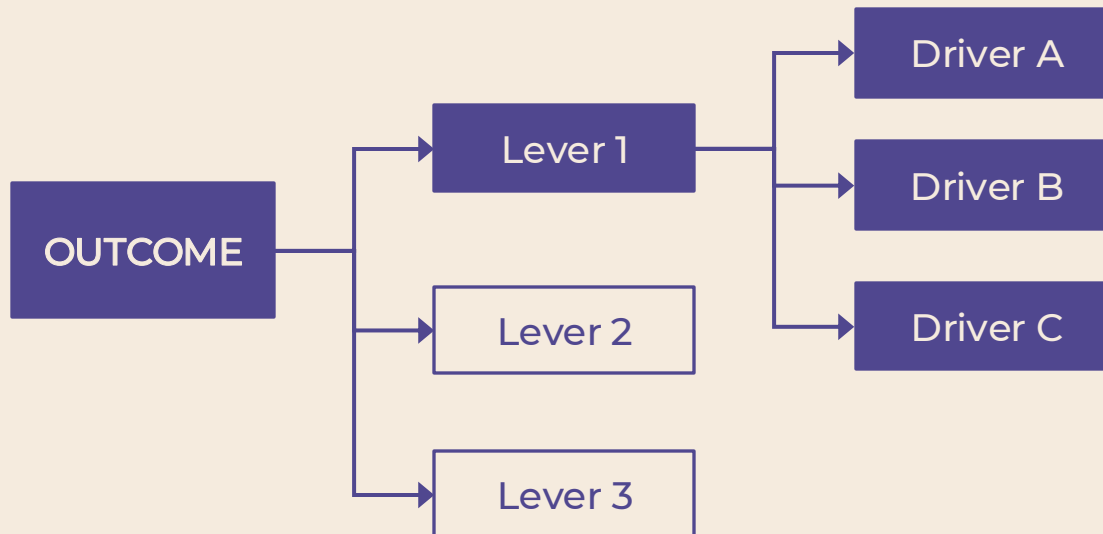


# Driver Tree

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

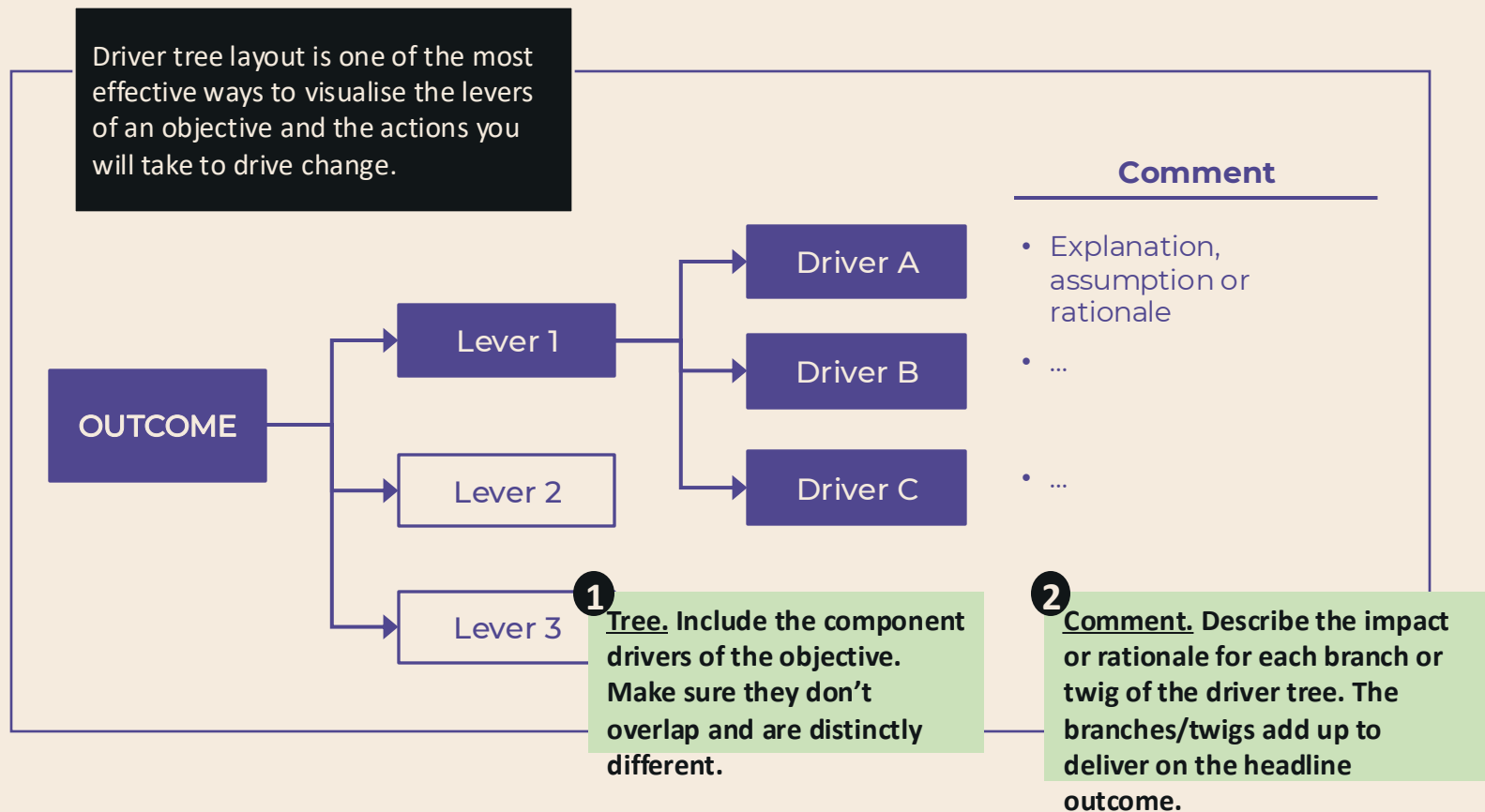


### Comment

- Explanation, assumption or rationale
- ...
- ...

# Driver Tree

## INSIGHT



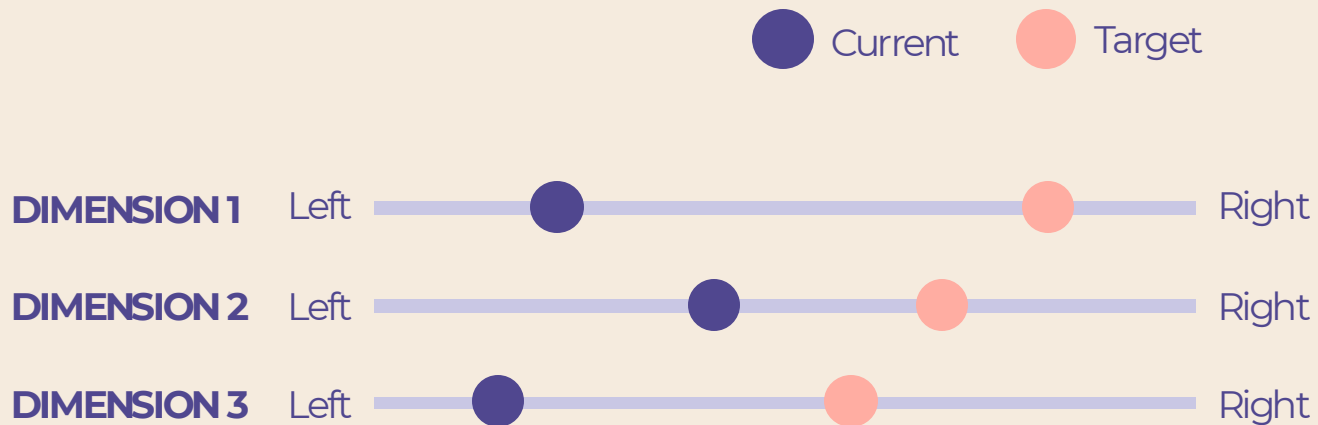
# Continuum

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### Continuum Sliders



# Continuum

## INSIGHT

OVERNIGHT STRATEGIST

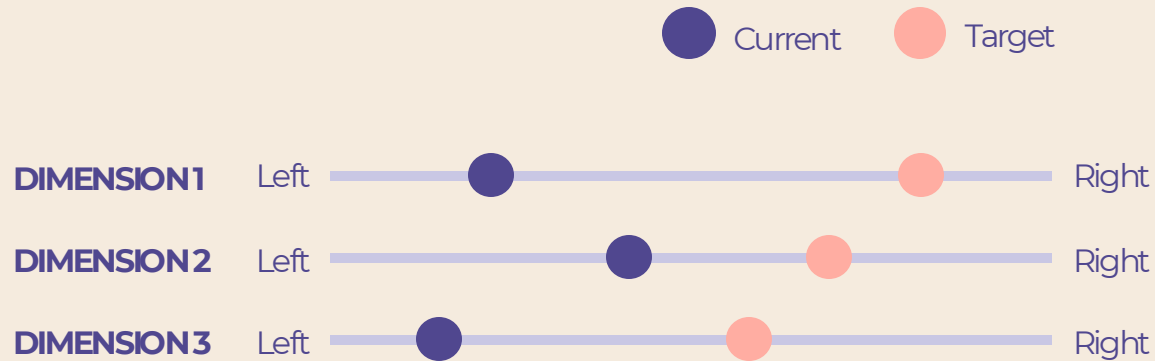
INSTRUCTIONS

The Venn diagram is used to visualise logical relationships between 2 to 4 groups, showing where they are distinctly different vs. where they are similar and overlap.

### Continuum Sliders

**1** Dimension. Define the list of attributes and the two ends of the spectrum for each attribute.

**2** Plot. Plot where your product or brand sits currently on the slider and where its going based on your strategy.





# Heat Map

## INSIGHT



# Heat Map

## INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS

1

Use the traffic light to give a 'high-med-low' type rating (or similarly "good-average-bad")

2

Alternative options are sizing the variables or signalling percent complete (maturity)

← Traffic Light → ← Alternatives →

Group 1	Item
	Item
	Item

Rating	Rating	Rating	Size	Percent

The heatmap layout is used to rate attributes from low to high (or small to big) and visually callout important attributes.

# Graph

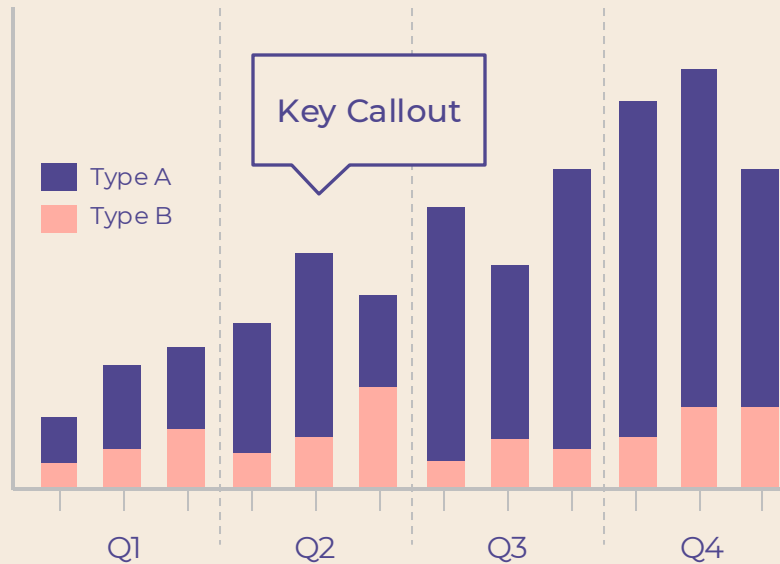
## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### Headline Statement

units



### Takeaway

- Describe the **drivers** and **insights** of the chart
- ...
- ...

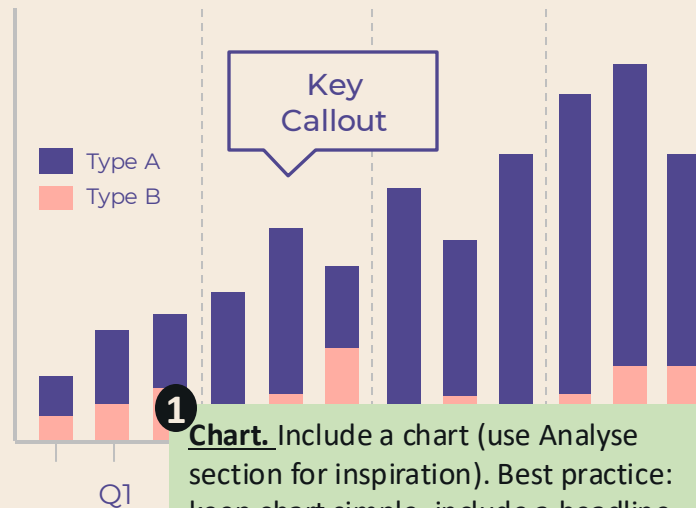
# Graph

## INSIGHT

The graphic insight page is another bread n' butter type layout that can be used in nearly all strategy papers that needs to show data.

### Headline Statement

units



**1 Chart.** Include a chart (use Analyse section for inspiration). Best practice: keep chart simple, include a headline summary statement and a callout for the important stat in the data set.

### Takeaway

- Describe the **drivers and insights** of the chart

• ...

• ...

**2 Takeaway.** Summarise your insights about the data here, with the angle of answering the “so what” questions the audience would have when looking at the chart.

# Matrix

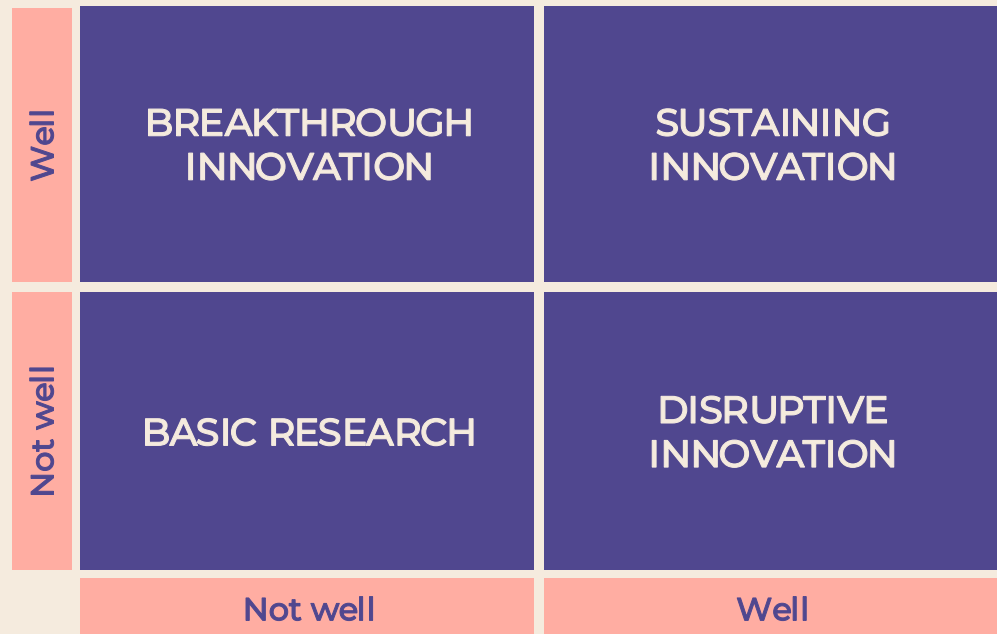
## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### 'Innovation Matrix' 2X2 Example

How well is the  
problem defined?



How well is the domain defined?

*Ref. Innovation Matrix, Greg Satell*

# Matrix

## INSIGHT

OVERNIGHT STRATEGIST

### INSTRUCTIONS

**1** Dimension. Define the 2 dimensions you would like to use to review your strategic options.

**2** Quadrant. Create the high and low split for each dimension to create your 4 quadrants (which become the 4 possible options).

#### 'Innovation Matrix' 2X2 Example

How well is the problem defined?

The 2X2 matrix is a common framework used to plot 4 possible options based on the horizontal and vertical axis.

Well	BREAKTHROUGH INNOVATION	SUSTAINING INNOVATION
	BASIC RESEARCH	DISRUPTIVE INNOVATION
	Not well	Well

How well is the domain defined?

*Ref. Innovation Matrix, Greg Satell*

# From:To

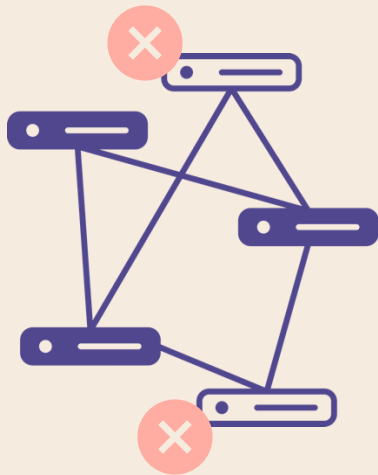
## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

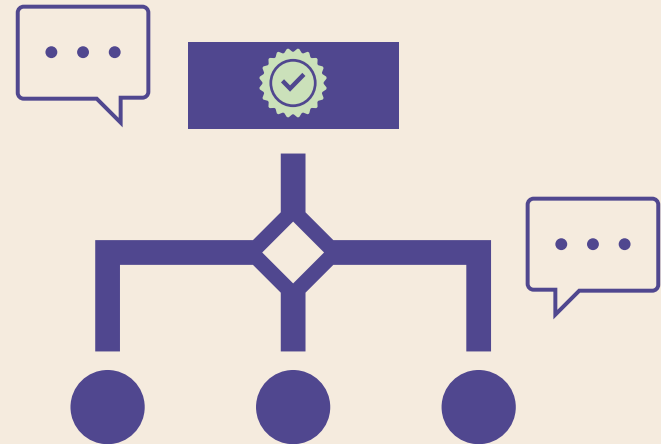
### The 'Before' and 'After' Visual

#### Current State



COMPLEX

#### Future State



SIMPLE

# From:To

## INSIGHT

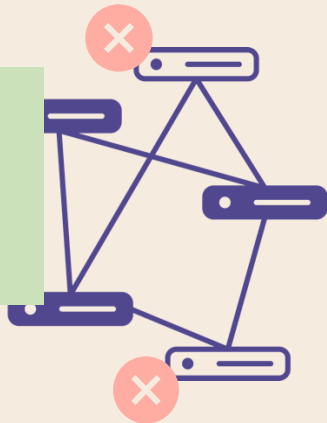
OVERNIGHT STRATEGIST

INSTRUCTIONS

### The 'Before' and 'After' Visual

#### Current State

**1** Current. Describe the current state as a visual or in bullet points. And specifically call out the issues and pain points.

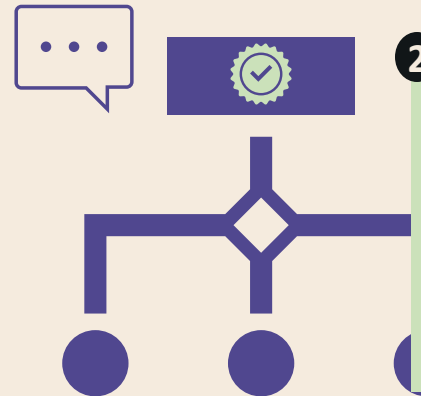


COMPLEX

The “from::to” or target state type visual diagram is a staple in most strategies. It visualises the what could be if we take the steps to solve the problem.

#### Future State

**2** Target. Visualise the end state that we are working towards. Most strategies paint a picture of the future and then describe the step blocks that get us to the end goal. Callout the benefits in the chart.



SIMPLE



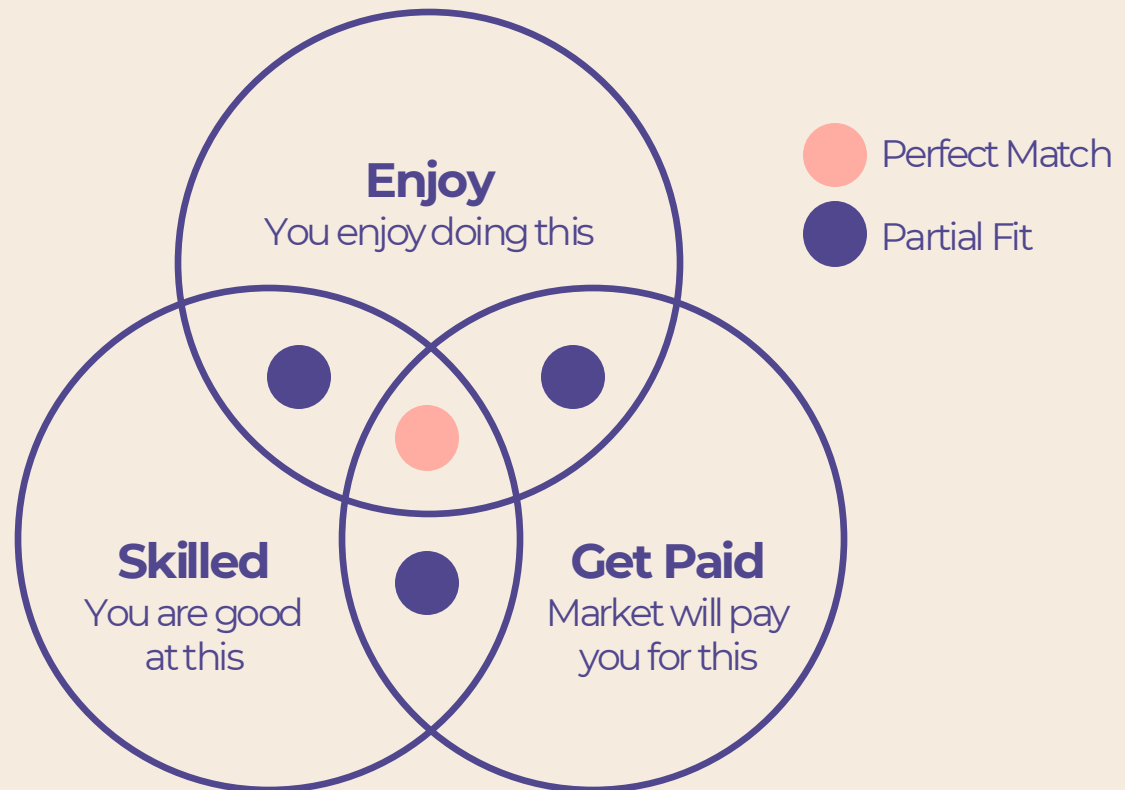
# Venn

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### 'Your Purpose' Venn Diagram Example



# Venn

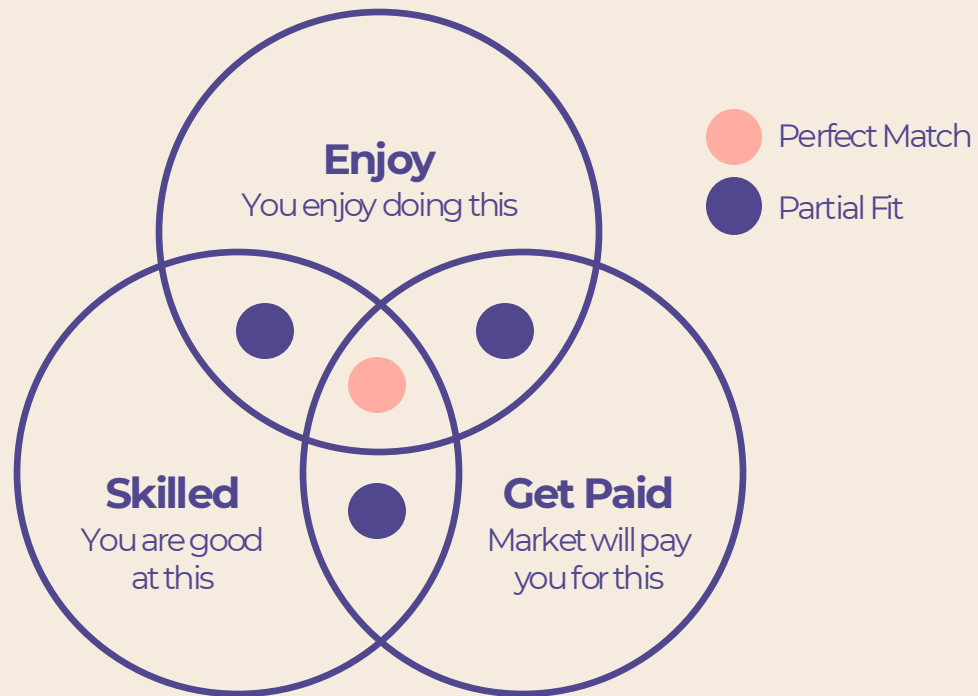
## INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS

### 'Your Purpose' Venn Diagram Example

The Venn diagram is used to visualise logical relationships between 2 to 4 groups, showing where they are distinctly different vs. where they are similar and overlap.



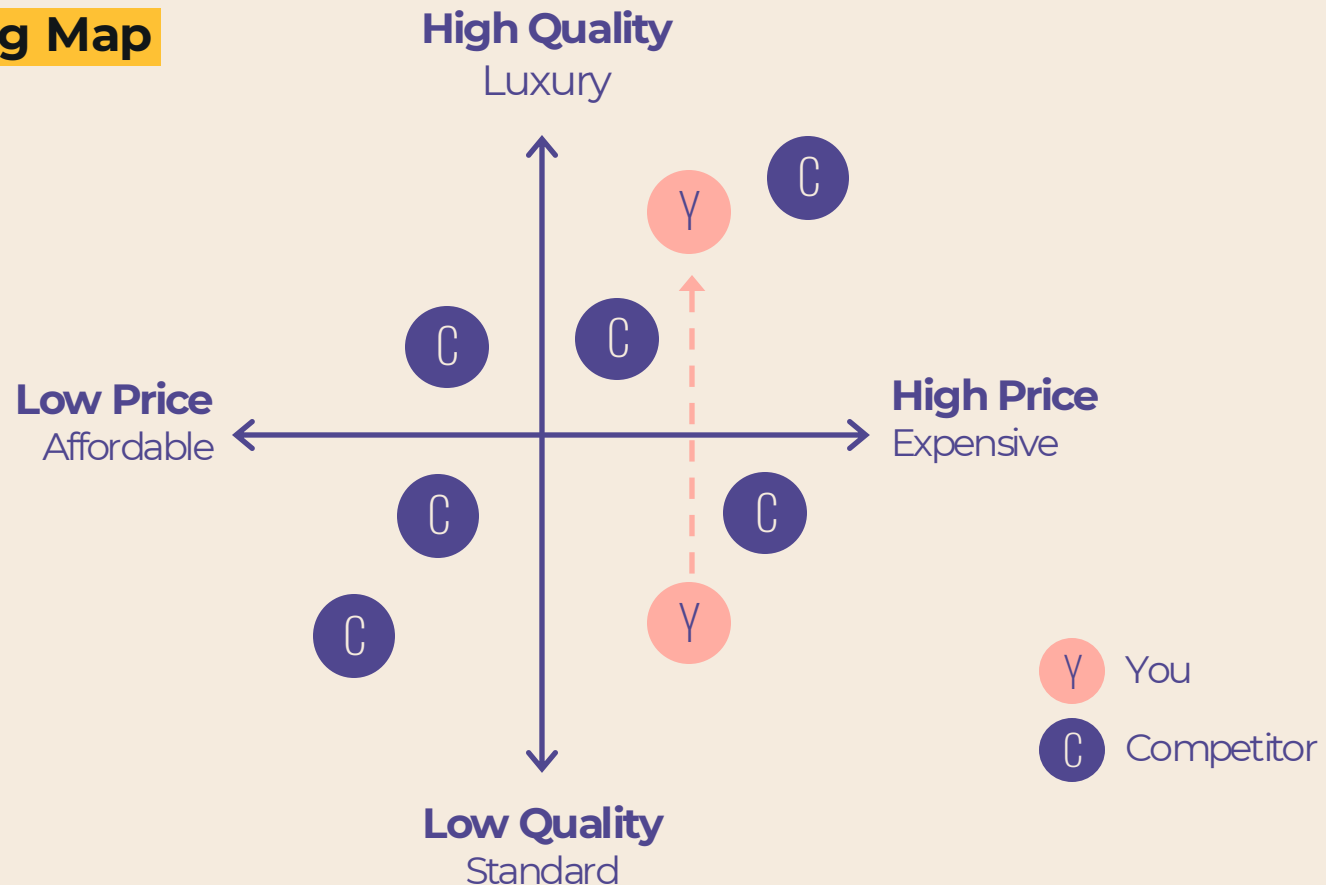
# Positioning

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### Positioning Map



# Positioning

## INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS

### Positioning Map

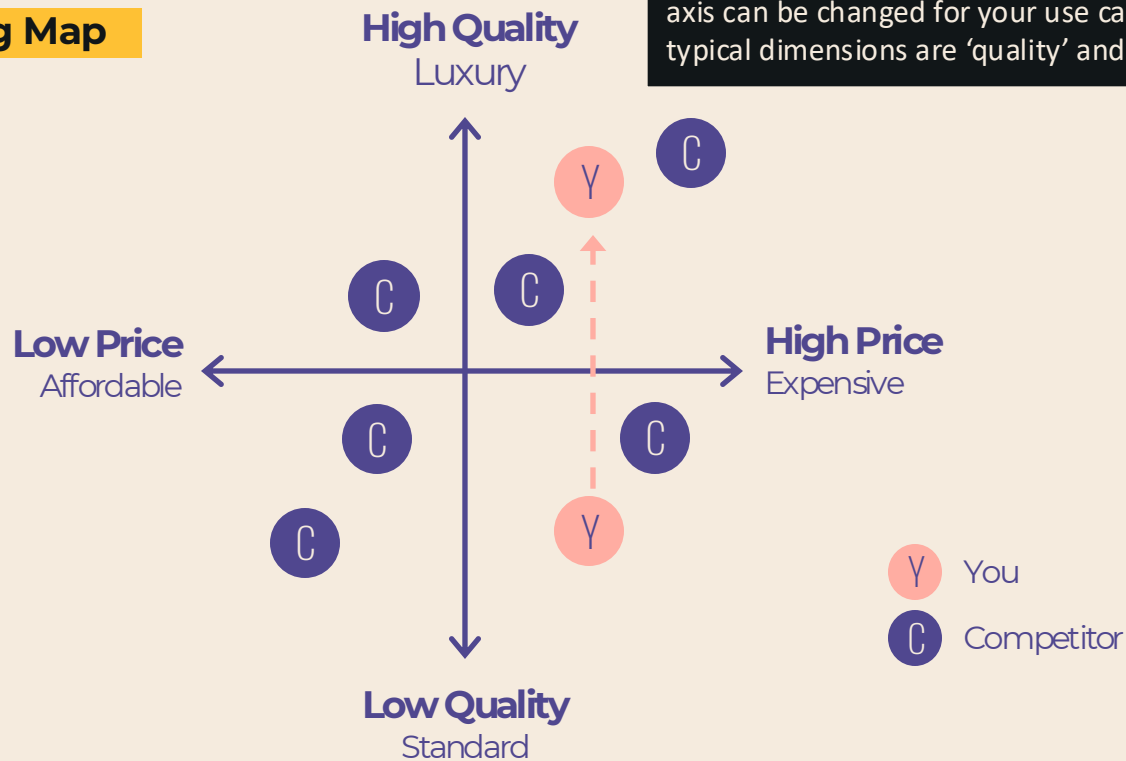
1

**Map.** Plot your product (or brand) and those of your competitors on an x and y axis based on 2 important dimensions (price and quality are most common).

2

**Callout.** Highlight your product or brand and (optionally) show your intended movement on the positioning map based on your strategic objectives.

The positioning map is useful to visualise your business or product in the context of the market and competitors. The x and y axis can be changed for your use case – typical dimensions are 'quality' and 'price'.



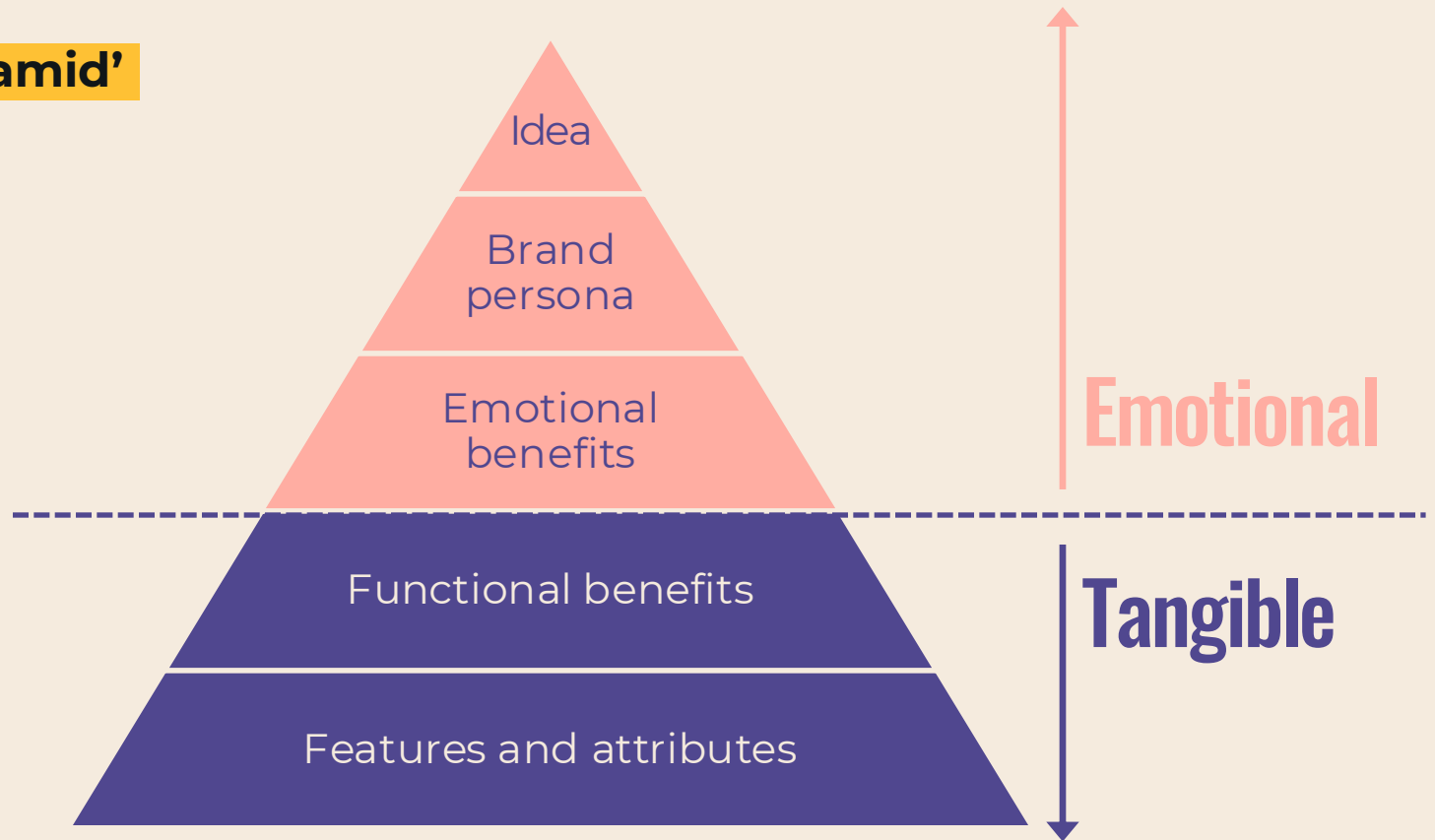
# Pyramid

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### 'Brand Pyramid' Example



*Ref. Brand Pyramid, Millward Brown*

# Pyramid

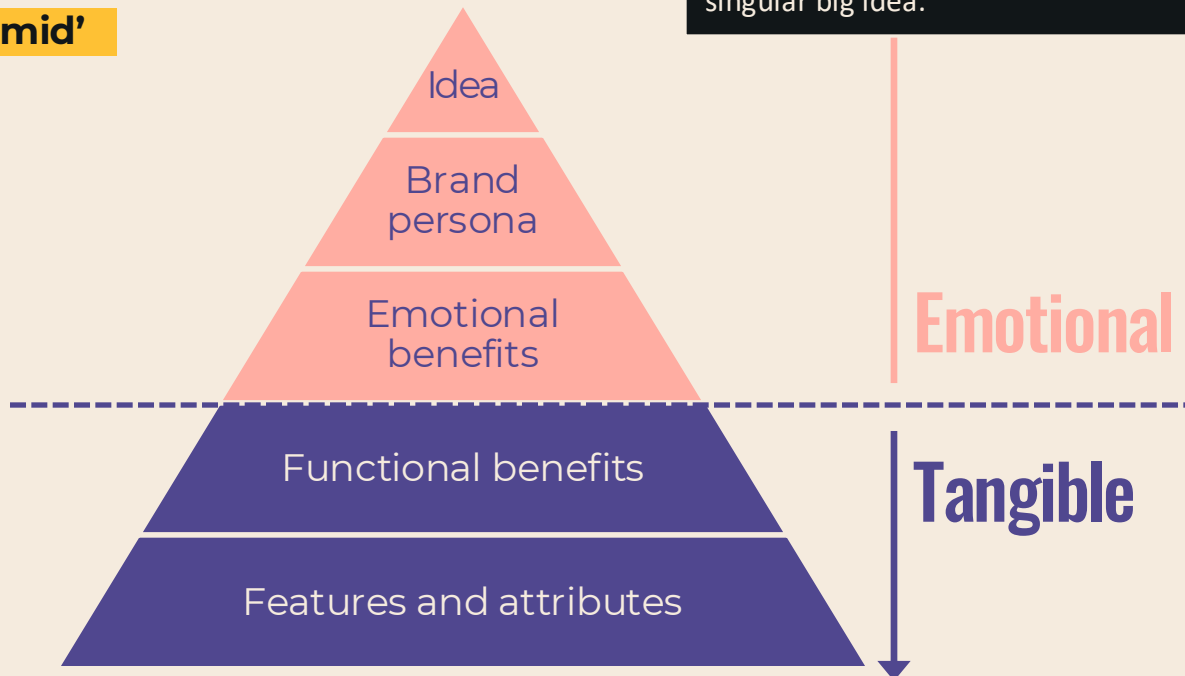
## INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS

The pyramid chart organises ideas that show ascension from bottom (many) to the top (few). The capstone often being the singular big idea.

**'Brand Pyramid'  
Example**



*Ref. Brand Pyramid, Millward Brown*

# Circular

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

**'Product Feedback Loop' Circular Segment Example**



*Ref. Hooked Model, Nir Eyal*

# Circular

## INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS

### 'Product Feedback Loop' Circular Segment Example

The circular chart is useful for visualising a concept as a series of steps within a loop. Each step in the loop is triggered by the action taken in the previous step, until it reaches the end of the loop, then the cycle repeats.



*Ref. Hooked Model, Nir Eyal*



# Journey

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### Customer Journey Map



# Journey

## INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS

The customer journey chart is useful for visualising the experience component of the strategy. There are many ways to show the experience, this layout should cover most use cases.

### Customer Journey Map

Explore

Buy

Connect

Use

Pay

Help



Steps

Steps

Steps

Steps

Steps

Moment  
of Delight

**3** WoW Moments. Pick the signature or highlight moments of the customer journey and explicitly call it out.

Moment  
of Delight

**1** Phase. Describe the customer journey into a series of blocks or phases from start to finish. The phases on this page is a good starting point.

**2** Steps. Deconstruct the customer journey phase into a set of steps or actions the customer is likely to perform.

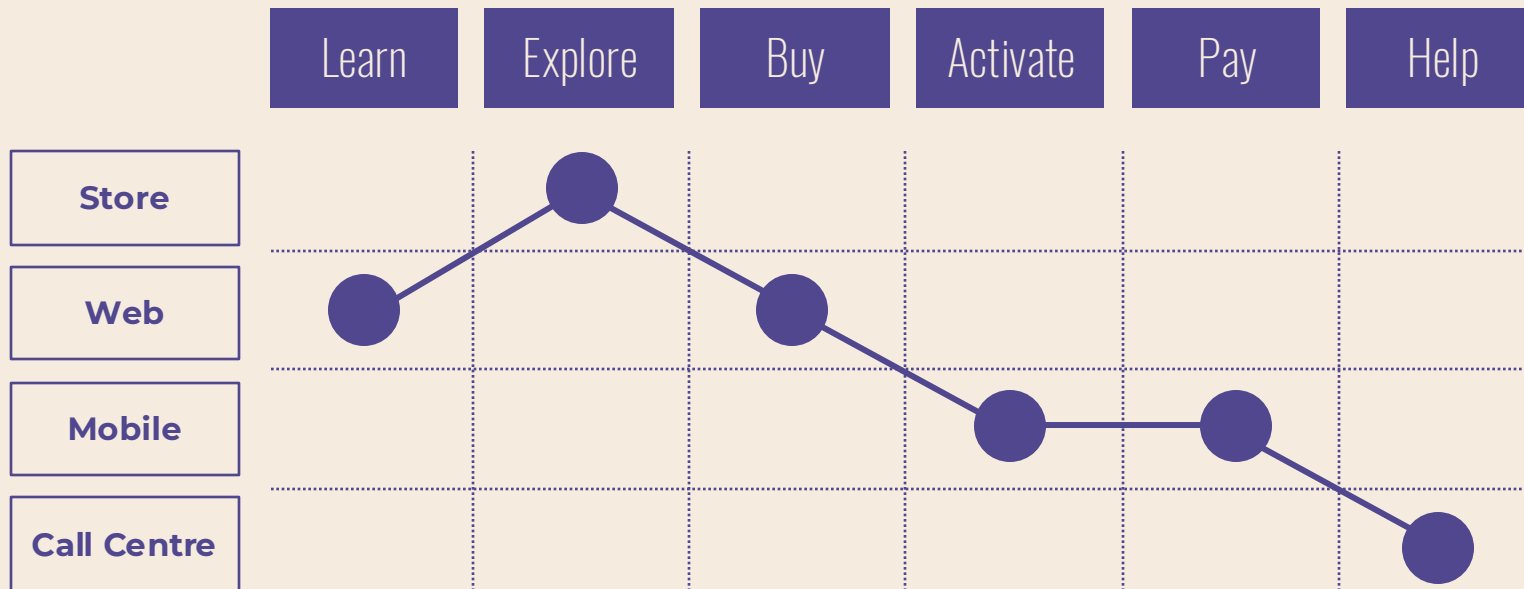
# Touchpoint

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### Multi-channel touchpoint



# Touchpoint

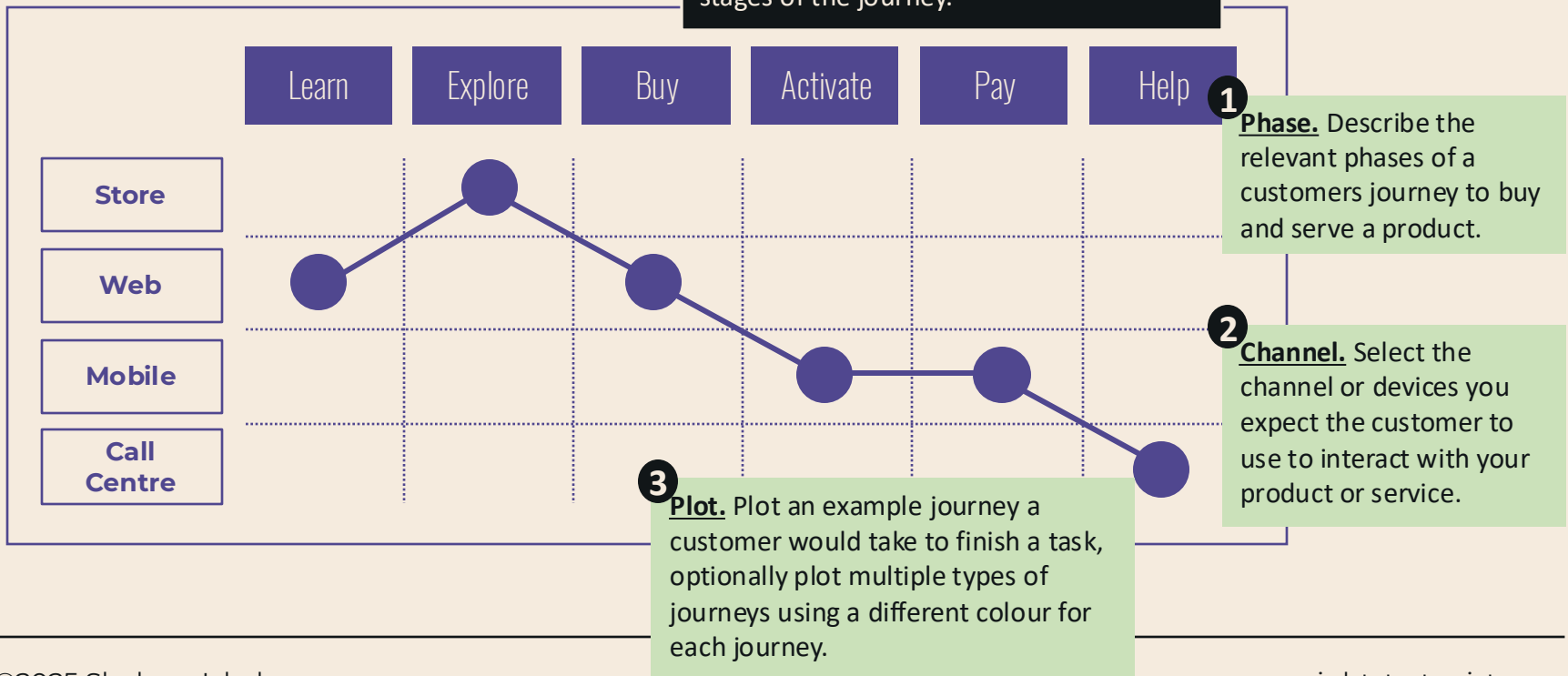
## INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS

### Multi-channel touchpoint

Multi-channel touchpoint is an alternate method of visualising customer journey when showing how a customer is likely to interact with your business at various stages of the journey.



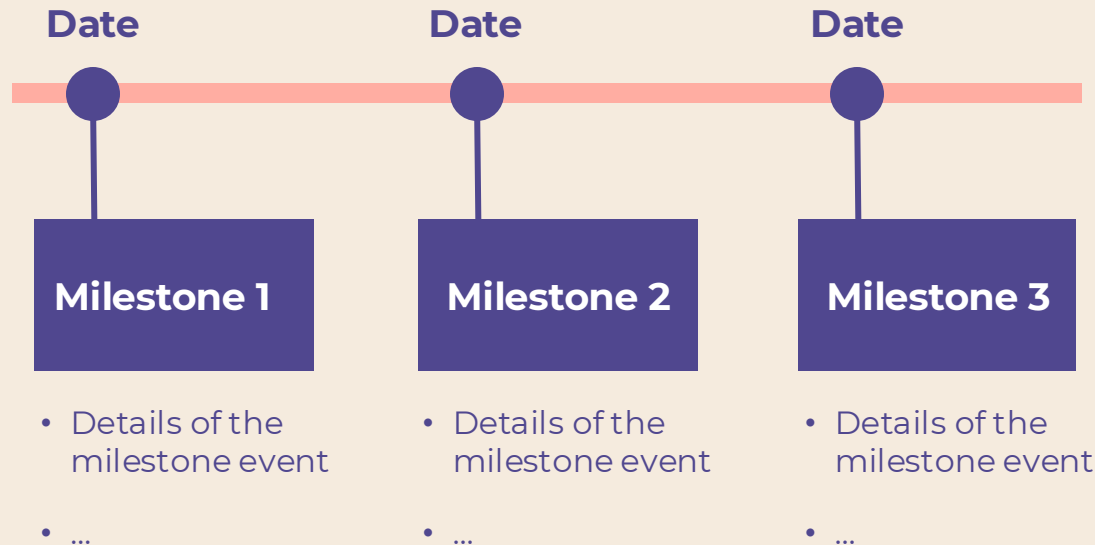
# Timeline

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### Historical Milestones



# Timeline

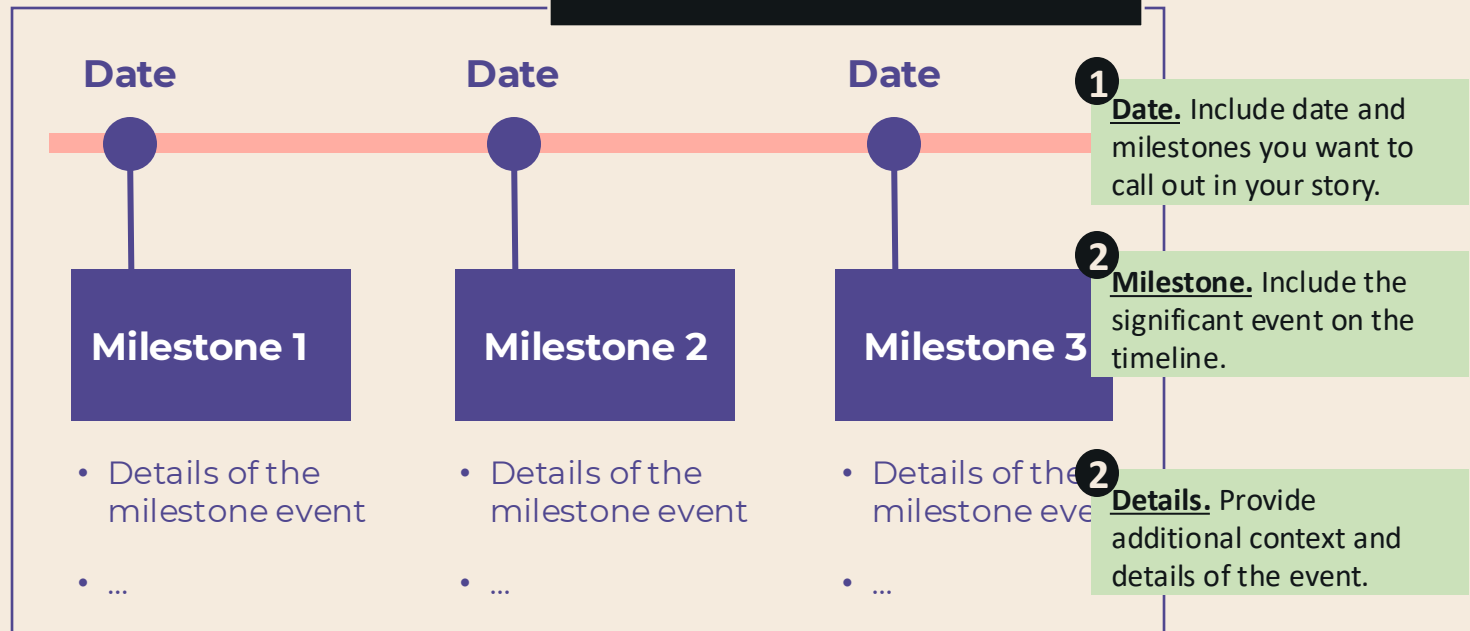
## INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS

### Historical Milestones

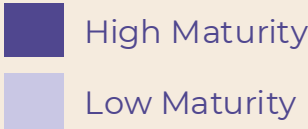
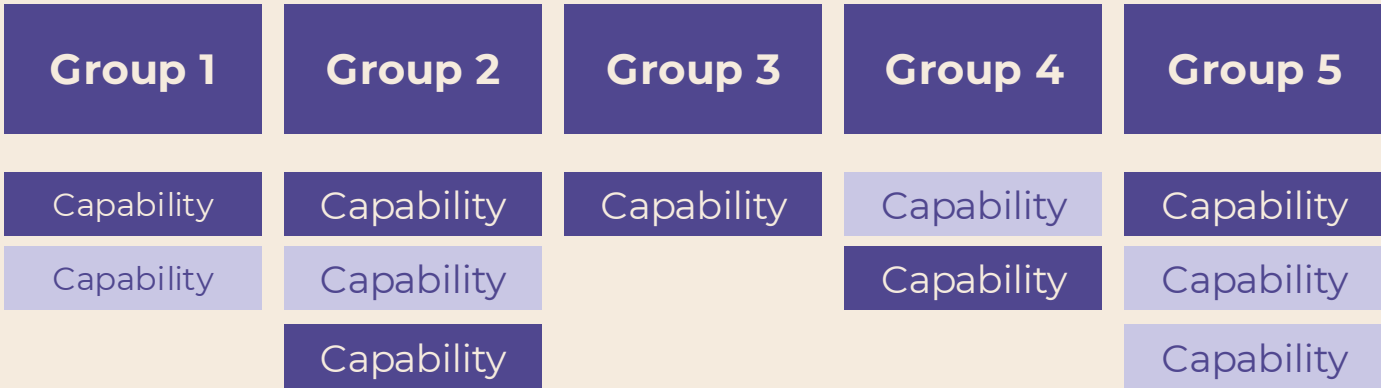
Timeline chart to visualise historical events up until current date, either horizontally or, optionally vertically.



# Capability Map

INSIGHT

Capability Maturity



# Capability Map

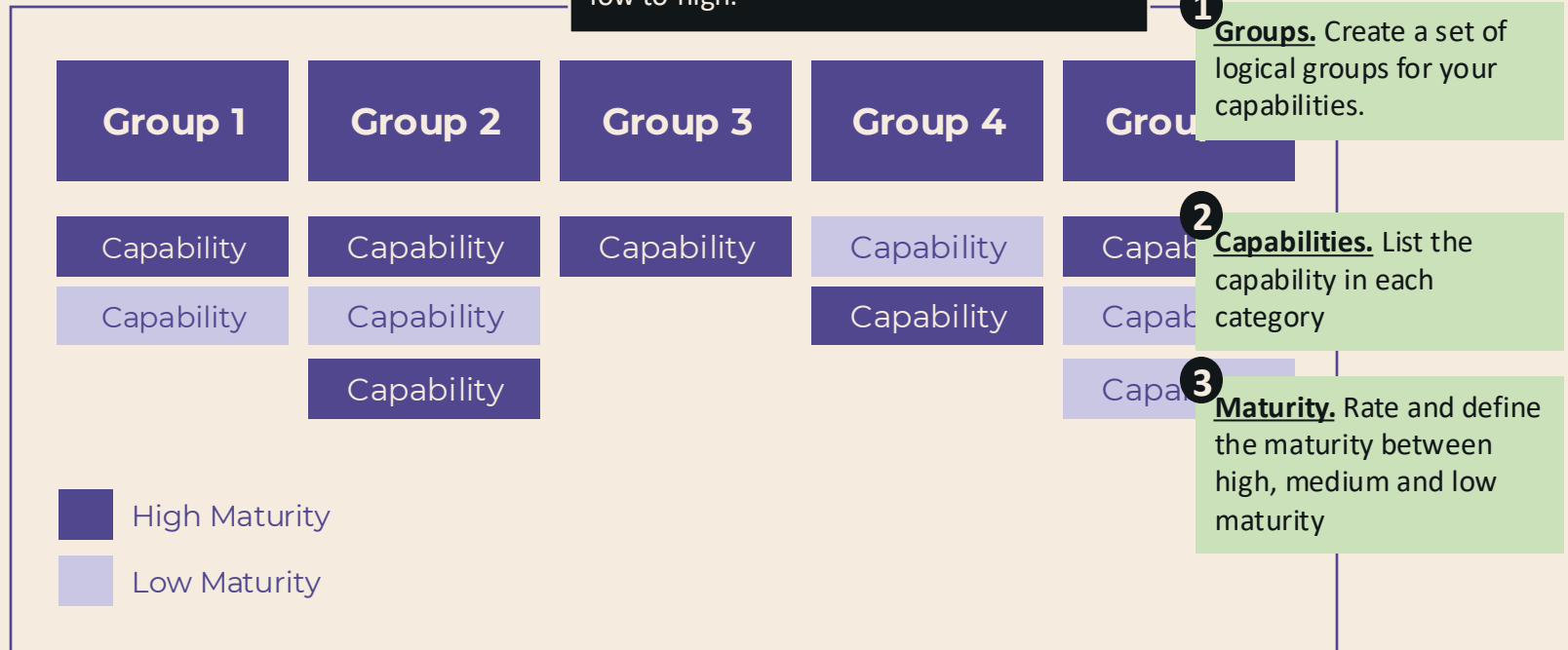
## INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS

### Capability Maturity

Capability map to identify and visualise the set of enablers for a business, product or platform and its level of maturity from low to high.





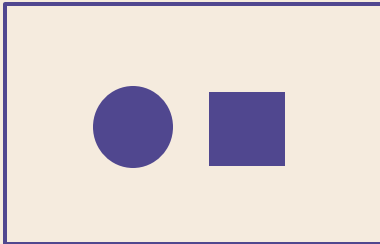
# Image Column

## INSIGHT

OVERNIGHT STRATEGIST

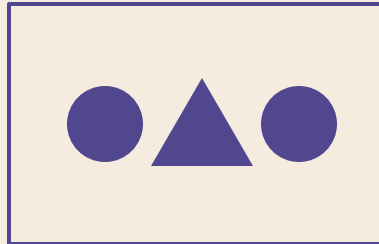
FRAMEWORK

Component 1



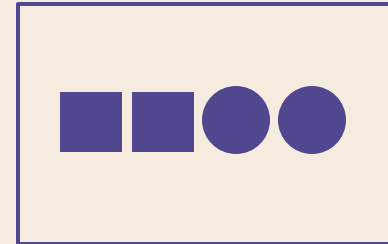
- Describe the **details of the component** and include any steps or evidence
- ...

Component 2



- Describe the **details of the component** and include any steps or evidence
- ...

Component 3

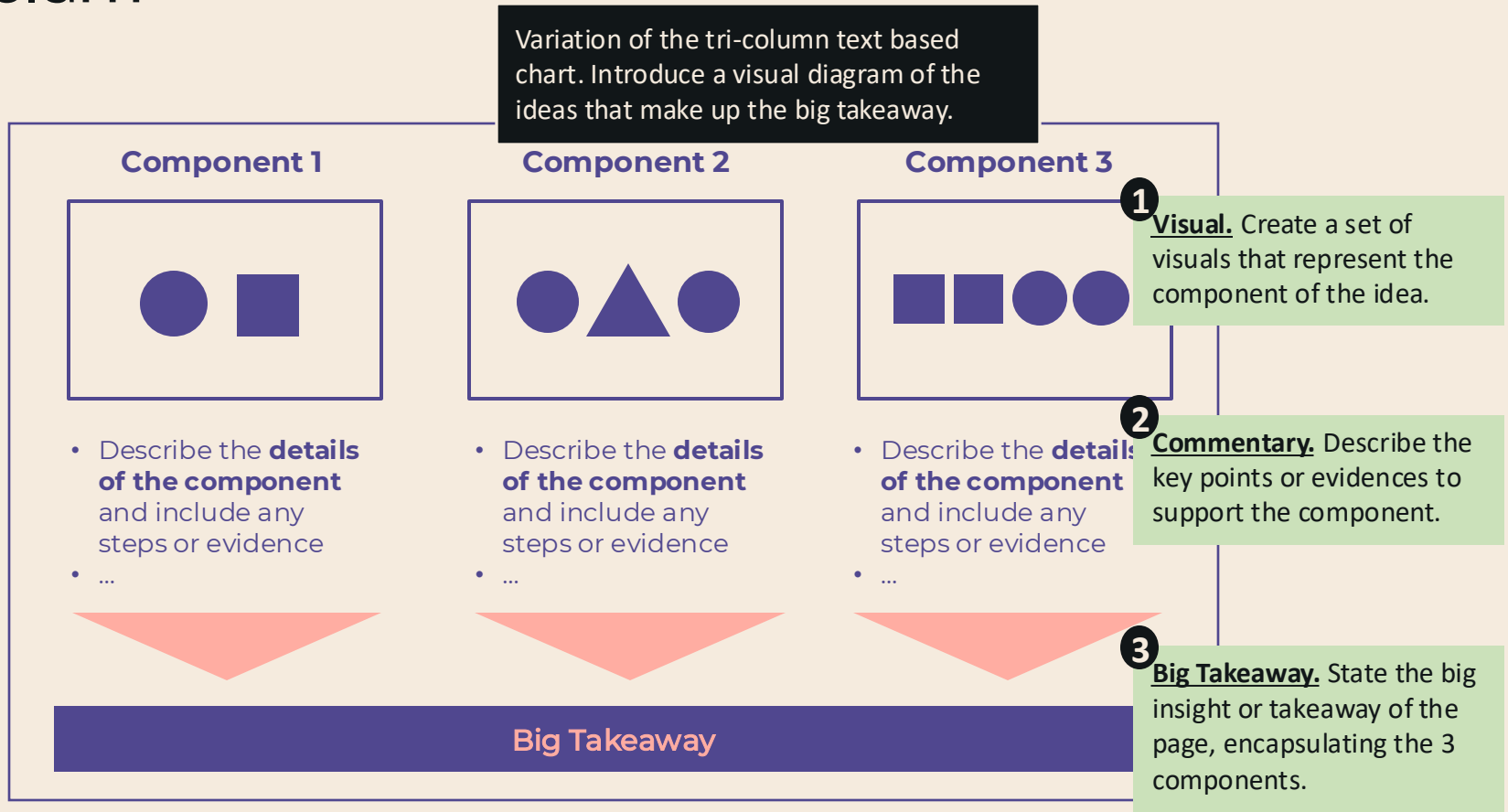


- Describe the **details of the component** and include any steps or evidence
- ...

Big Takeaway

# Image Column

## INSIGHT



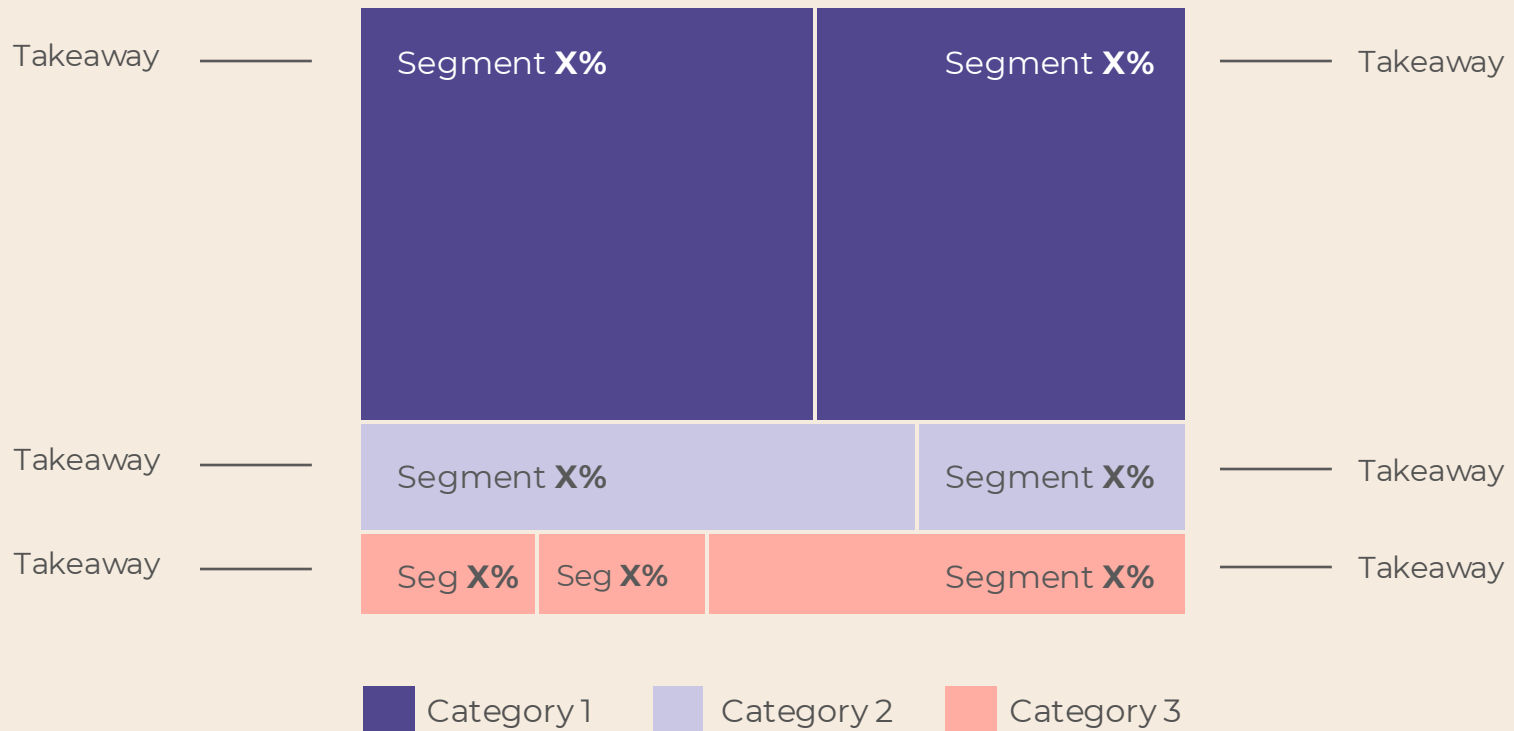
# Segmentation

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### Market Or Customer Segments



# Segmentation

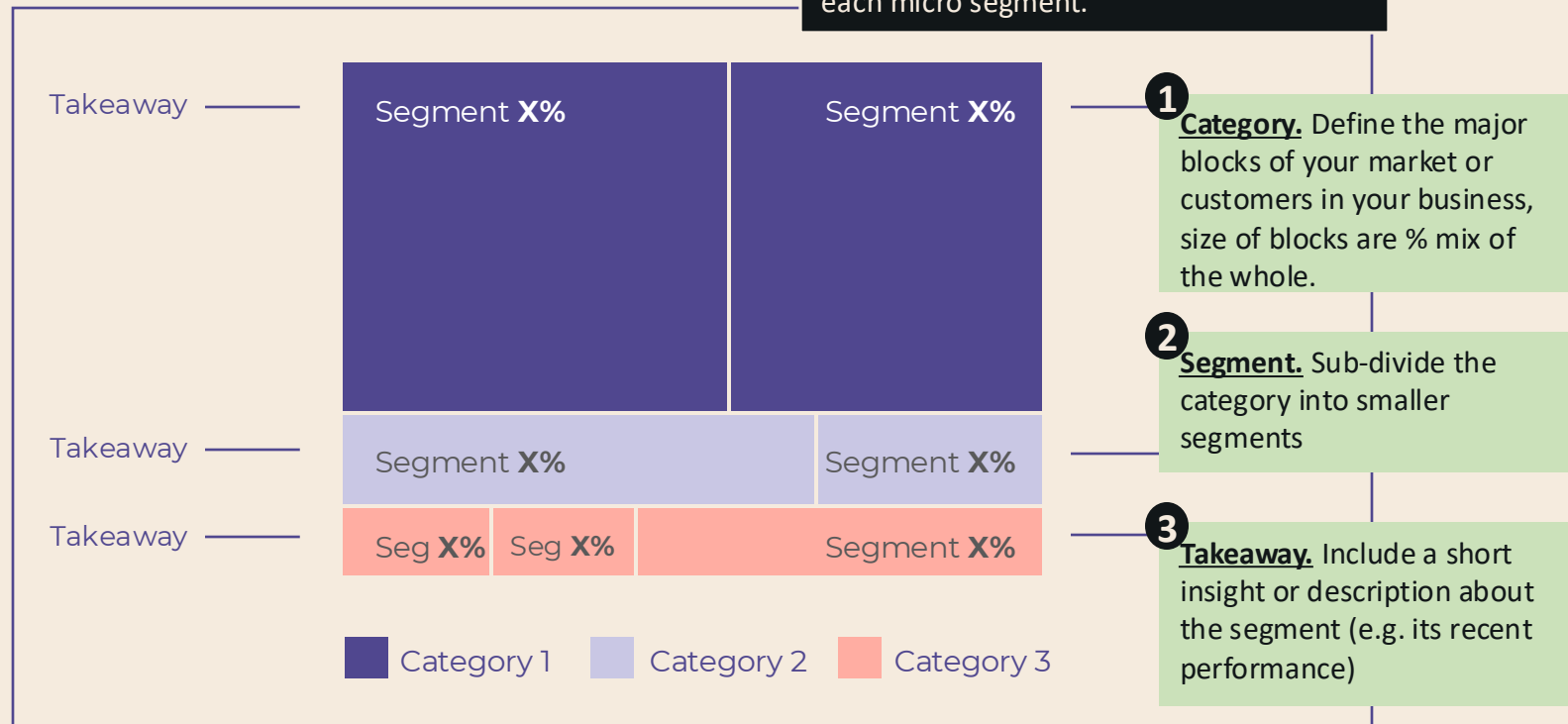
## INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS

### Market Or Customer Segments

Market or customer segmentation map that shows size of each macro and micro segment, including a quick comment for each micro segment.



# Hub n' Spoke

## INSIGHT

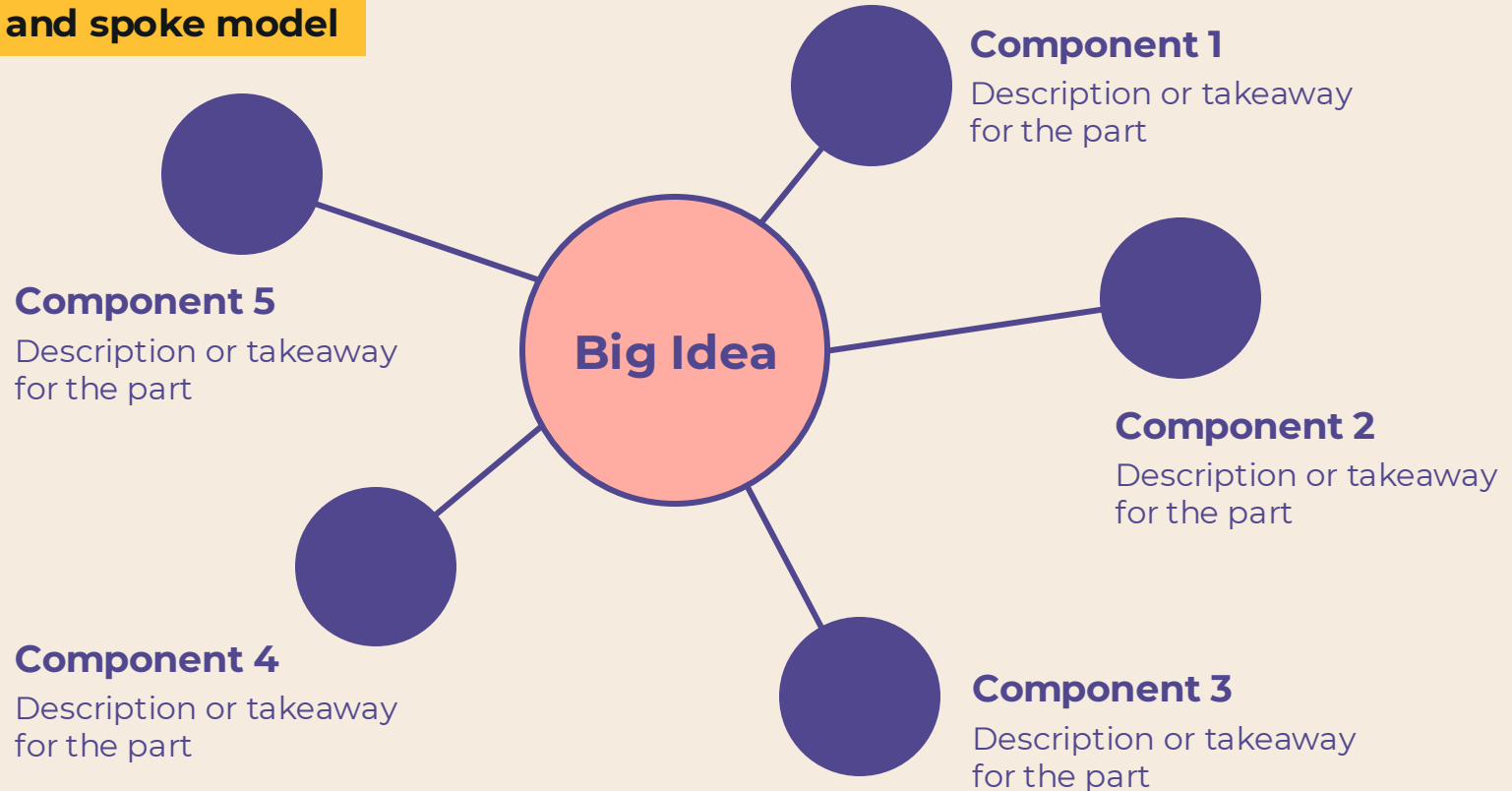
OVERNIGHT STRATEGIST

FRAMEWORK

+

INSTRUCTIONS

### Hub and spoke model



# 3x3 Model

## INSIGHT

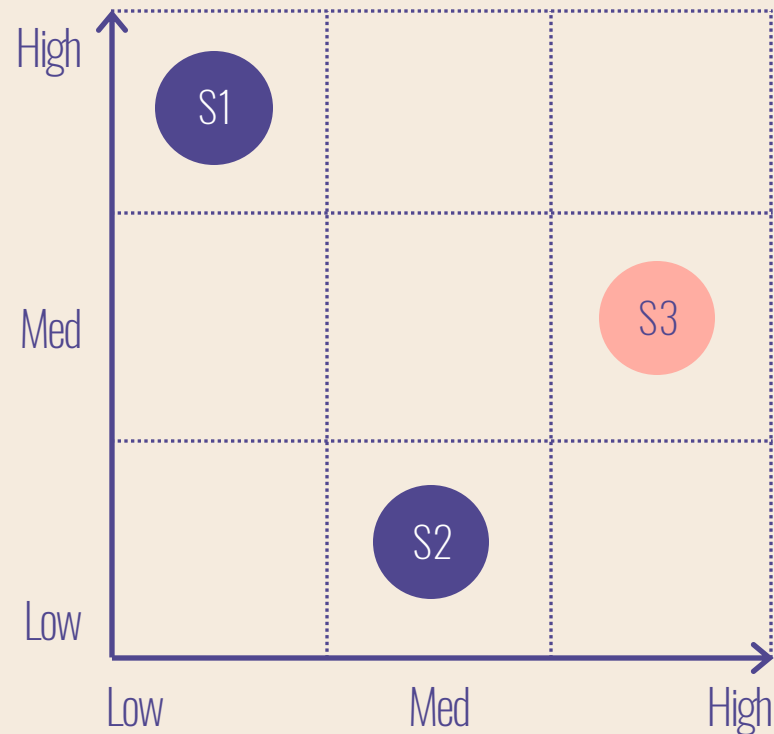
OVERNIGHT STRATEGIST

FRAMEWORK

**Segment  
Assessment**

**Ability To Win**

eg. competition, value  
prop, capability



*Ref. Inspired by the classic GE-McKinsey Matrix*

**Segment Attractiveness**

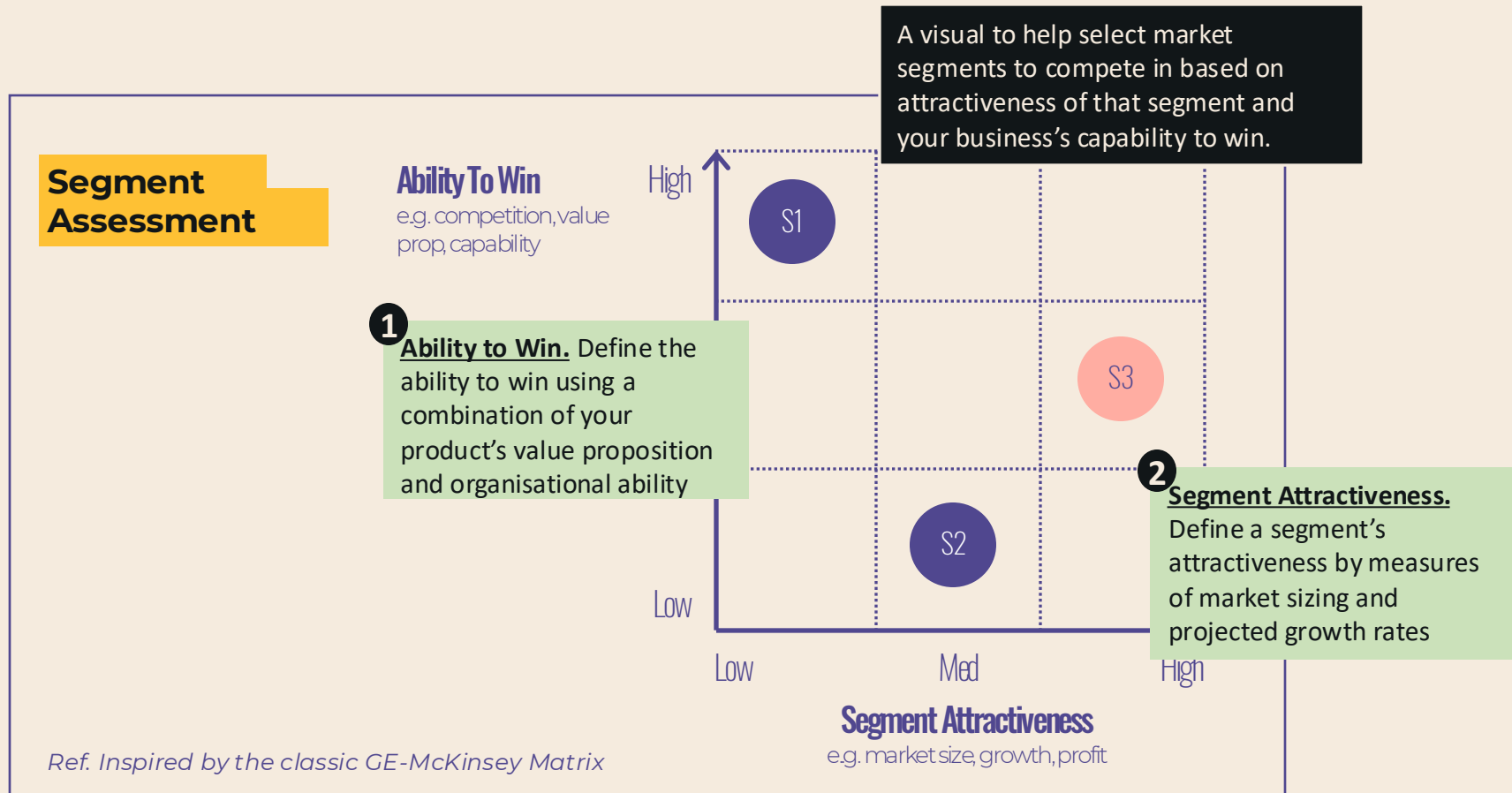
eg. market size, growth, profit

# 3x3 Model

## INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS



# Story

OVERNIGHT STRATEGIST

## Story Frameworks

### Strategic Storytelling

Minto Pyramid

HV Logic

MECE

SCQA

### Alternative Frameworks

Story Spine

5 Act

StoryBrand



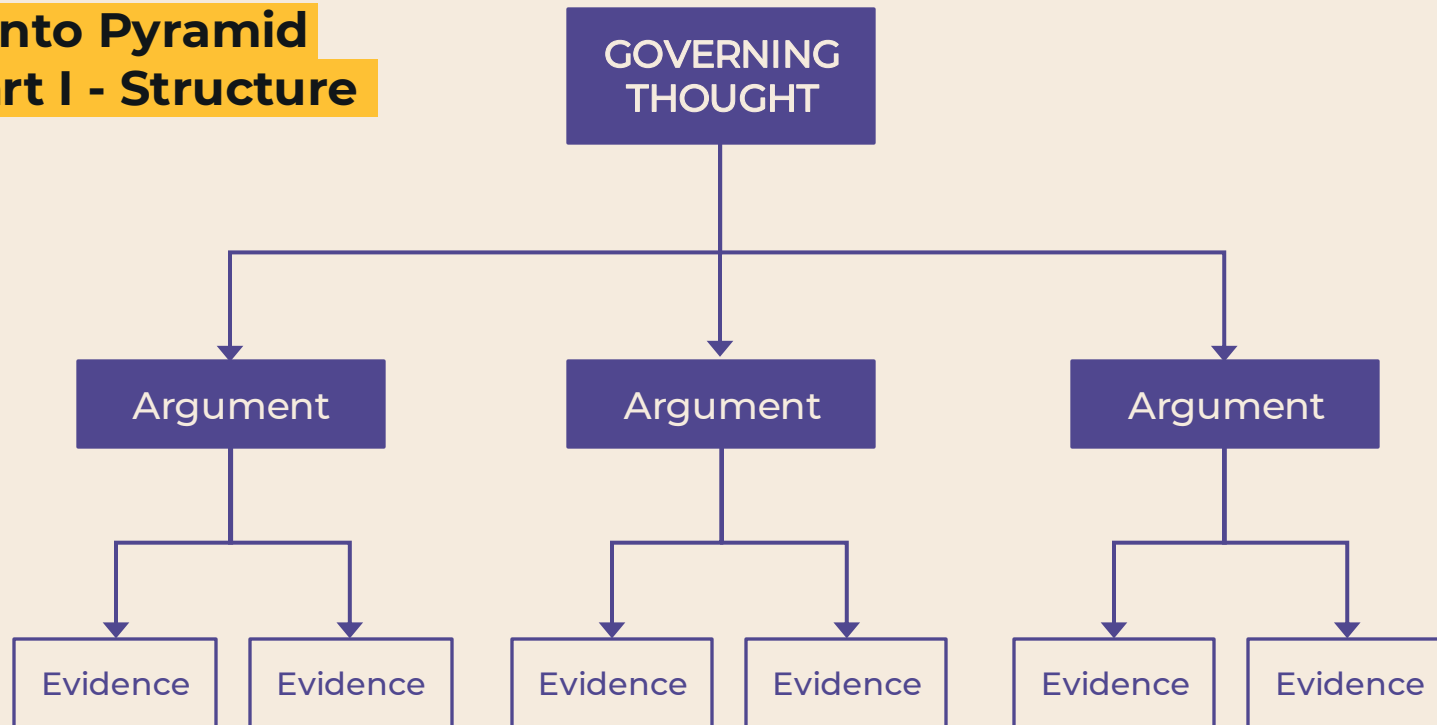
# Minto Pyramid

## STORY

OVERNIGHT STRATEGIST

FRAMEWORK

### Minto Pyramid Part I - Structure



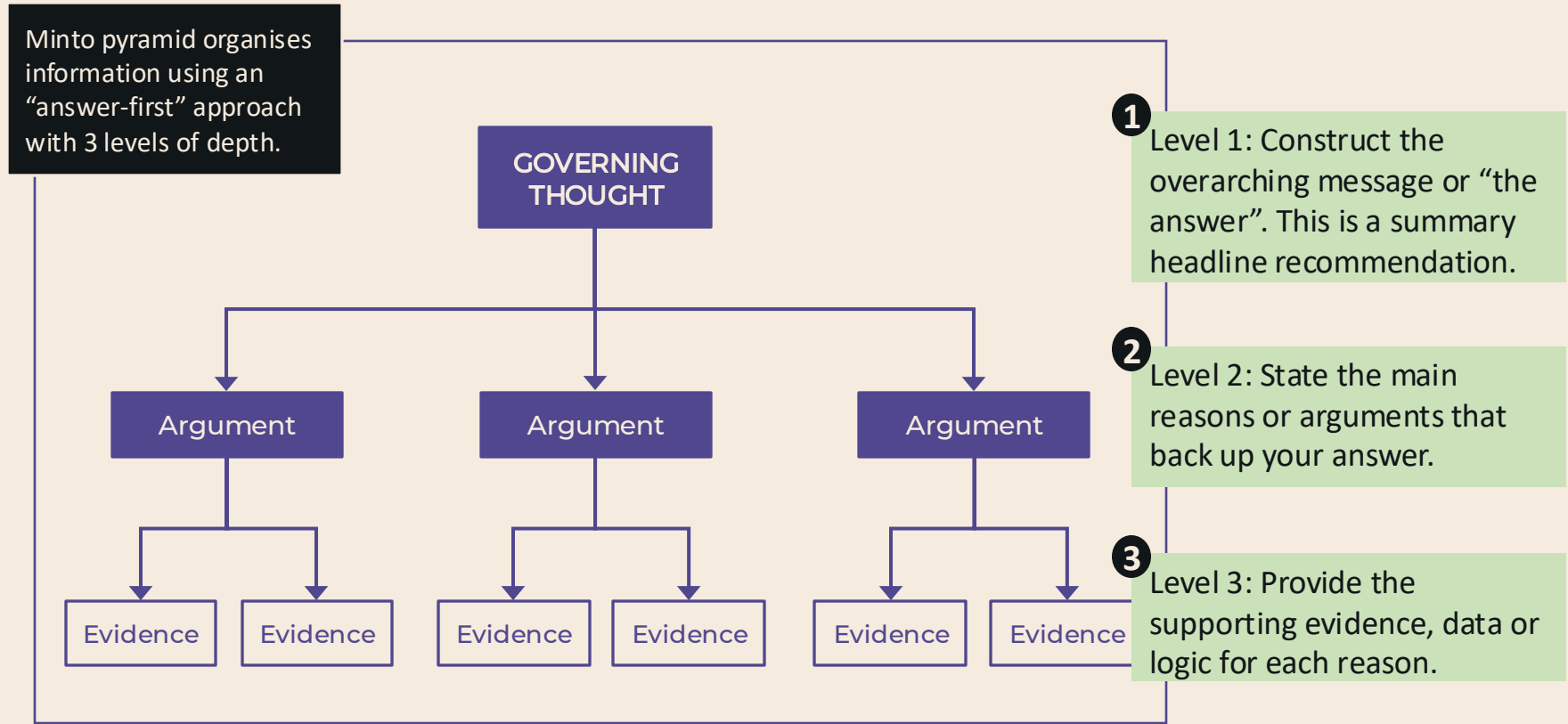
*Ref. Barbara Minto, The Minto Pyramid Principle*

# Minto Pyramid

## STORY

OVERNIGHT STRATEGIST

INSTRUCTIONS



# HV Logic

## STORY

OVERNIGHT STRATEGIST

FRAMEWORK

+

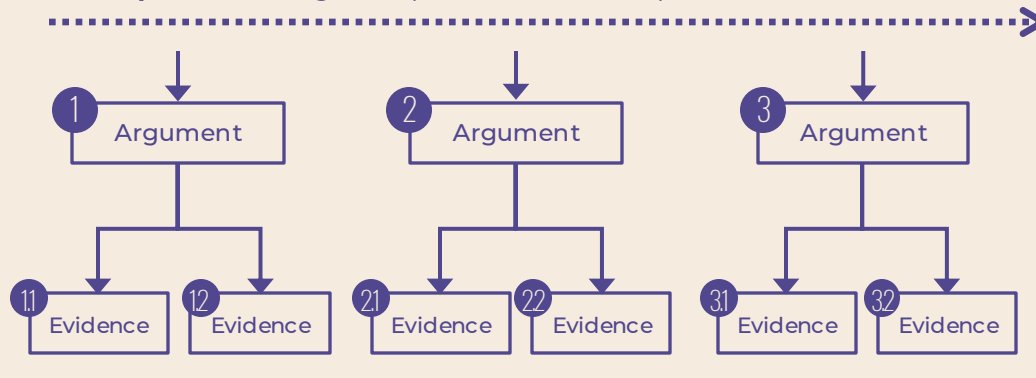
INSTRUCTIONS

### Minto Pyramid Part II – Horizontal & Vertical Logic

## Horizontal Logic

Arguments can be presented as **'parts of a whole'** or **'in sequence'**:

- **Parts of a whole** - each argument point supports the governing thought, or
- **In sequence** - each argument point builds on the last point to arrive at a conclusion.



## Vertical Logic

Each layer of the pyramid answers the question posed by the layer above it. The reader is typically asking the question **"why is that"** or **"how is that done"** which is answered in the layer below.

Ref. Barbara Minto, *The Minto Pyramid Principle*

# MECE

## STORY

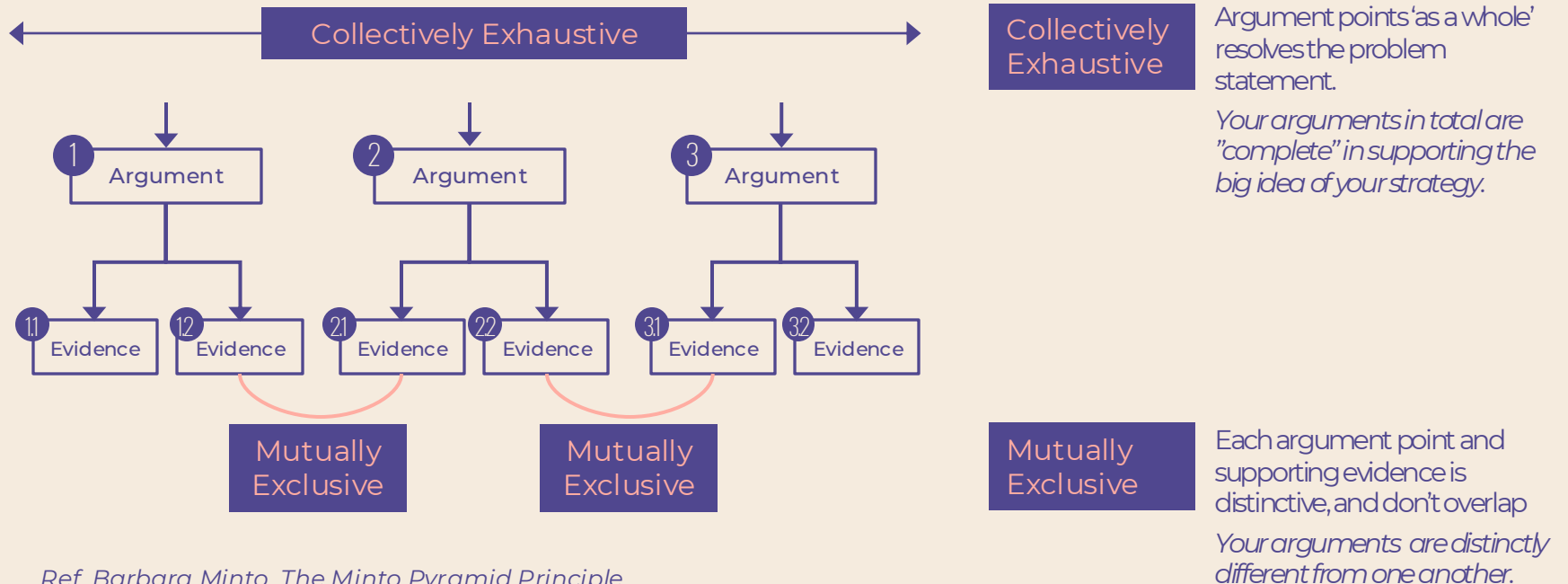
OVERNIGHT STRATEGIST

FRAMEWORK

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INSTRUCTIONS

### Minto Pyramid Part III – Mutually Exclusive, Collectively Exhaustive



Ref. Barbara Minto, The Minto Pyramid Principle

# SCQA

## STORY

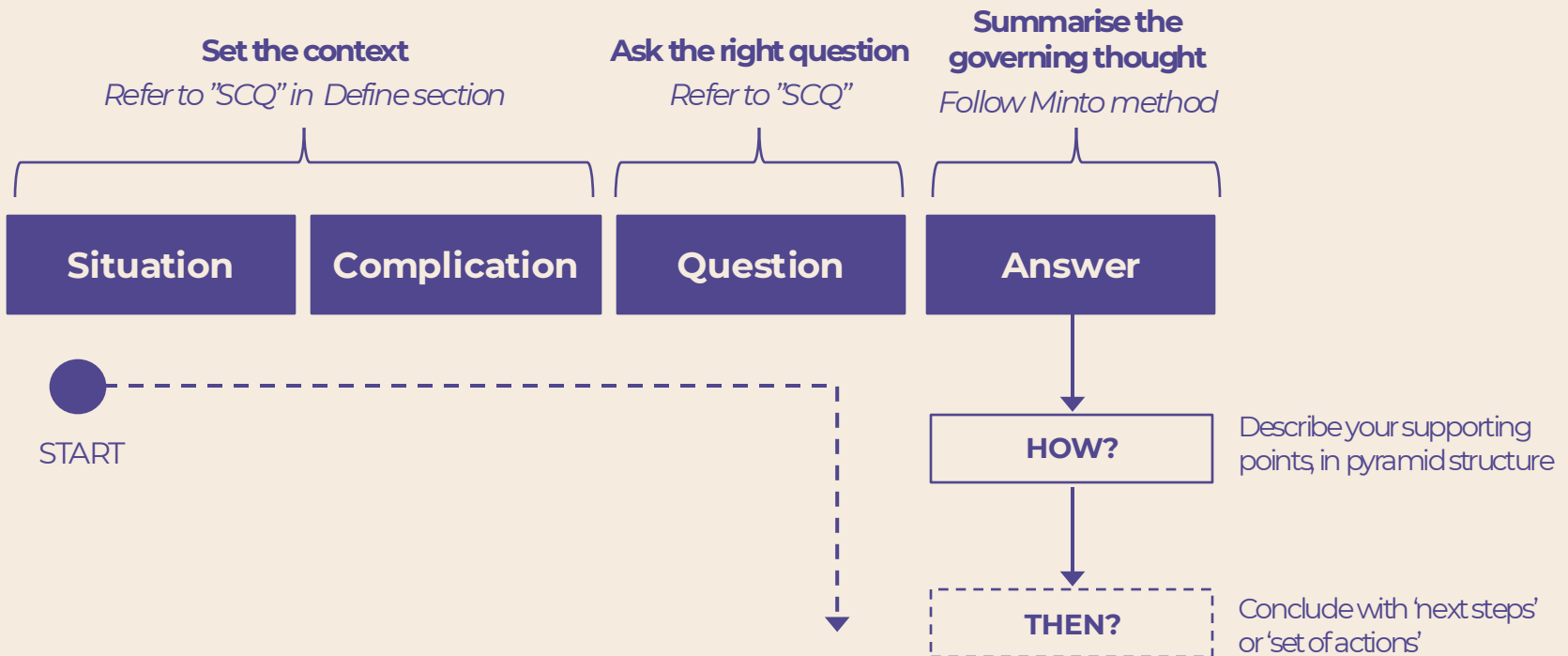
OVERNIGHT STRATEGIST

FRAMEWORK

+

INSTRUCTIONS

### Situation-Complication- Question-Answer Framework



# Story Spine

## STORY

OVERNIGHT STRATEGIST

FRAMEWORK

### The Story Spine *aka* Pixar Storytelling Framework

Once upon a time there was \_.

Every day, \_.

But, one day \_.

Because of that, \_.

Because of that, \_.

Until finally \_.

Beginning

Event

Middle

Climax

*Ref. Kenn Adams, The Story Spine*

# Story Spine

## STORY

OVERNIGHT STRATEGIST

### INSTRUCTIONS

The Story Spine is a model for a structured story, typically used in screenplays and movies but can be adapted for any story

### The Story Spine aka Pixar Storytelling Framework

Note: This model works better when you want to describe events that have occurred – much like a case study.

In a forward looking strategy – its better to have the “climax” (the end state) described early on in the deck.

Once upon a time there was \_.

Every day, \_.

But, one day \_.

Because of that, \_.

Because of that, \_.

Until finally \_.

Beginning

Event

Middle

Climax

**1** Beginning: Introducing the context of your story – the facts around the business, its market and its current status.

**2** Event: However, something happens that causes problems for the business or product or prevents it from reaching its intended goals.

**3** Middle: And because of that, you pursue a series of actions (strategic imperatives) in order to resolve this problem and achieve your goal.

**4** Climax: Then finally, we achieve the goal we originally set out to deliver. At this point, we can describe what comes next.

*Ref. Kenn Adams, The Story Spine*

# 5 ACT STORY

OVERNIGHT STRATEGIST

FRAMEWORK

## 5 Act Story Framework



*Ref. Jason Ocker (Maark), 5 Act Story Framework (adapted from Gustav Freytag's 'Freytag Pyramid')*



# 5 ACT STORY

OVERNIGHT STRATEGIST

## INSTRUCTIONS

The 5 Act Story framework is adapted from Freytag's Pyramid to tell marketing stories i.e. with intention to sell a product or service.

### 5 Act Story Framework



**1 Trends:** Describe the context of your business or product and the market forces or customer behaviour impacting it.

on Ocker (Maark), 5 Act Story Framework (adapted from Gustav Freytag's 'Freytag Pyramid')

**2 Challenges:** Describe the challenges your business faces currently or obstacles preventing you from meeting your objectives.

**3 Big Idea:** Describe your 'big idea' or vision of how things should work to address the challenges you face (aka target state).

**4 Benefit:** Describe the headline benefits of the solution and the value it creates for your business.

**5 Differentiators:** Describe how you are uniquely positioned to help your client (note, this is if you are pitching, otherwise ignore or repurpose to roadmap and next steps.)

# StoryBrand

## STORY

OVERNIGHT STRATEGIST

FRAMEWORK



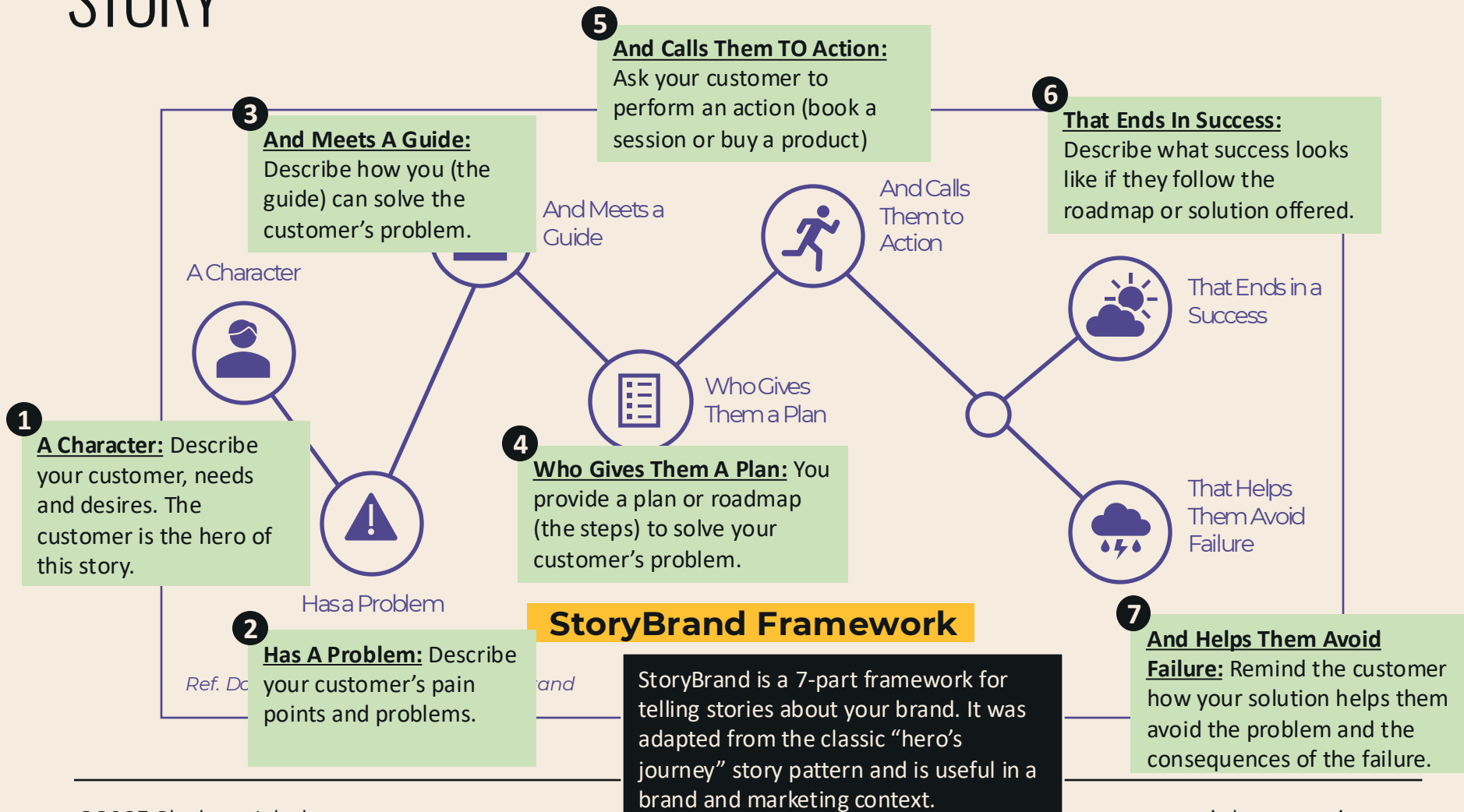
*Ref. Donald Miller, Building a Story Brand*

# StoryBrand

## STORY

OVERNIGHT STRATEGIST

### INSTRUCTIONS



# Decide

OVERNIGHT STRATEGIST

## Decision Models

**Broad**  
appeal

Eisenhower

Eisenhower Box  
Mental Model

ABCD

Ad hoc, big-bet,  
cross-cutting and  
delegated decisions

**Option**  
review

Decision Tree

Decision-Chance  
Node Tree

Pros & Cons

Simple option  
evaluation model

Evaluation

Criteria-based option  
evaluation model

**2 Speed**  
model

Bezos

High Quality, High  
Speed Decisions

**Difficult**  
decisions

SPADE

Setting-People-  
Alternatives-Decide-  
Explain Framework

Bull & Bear

Upper and lower  
scenarios

# Eisenhower

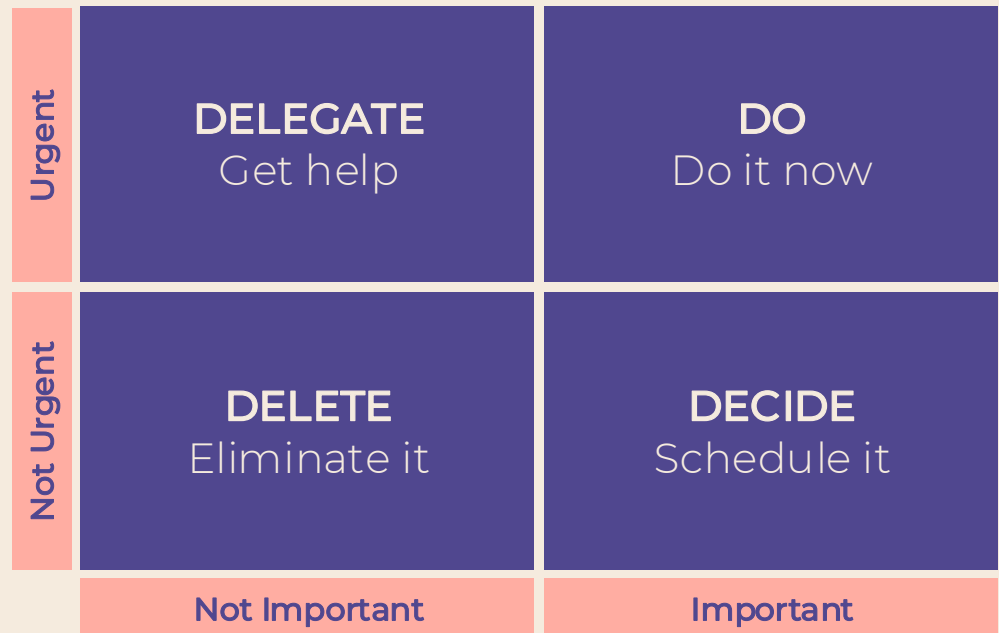
## DECIDE

OVERNIGHT STRATEGIST

FRAMEWORK

### Eisenhower Box – Mental Model

How time critical  
is the issue?



How important is the issue?

# Eisenhower

## DECIDE

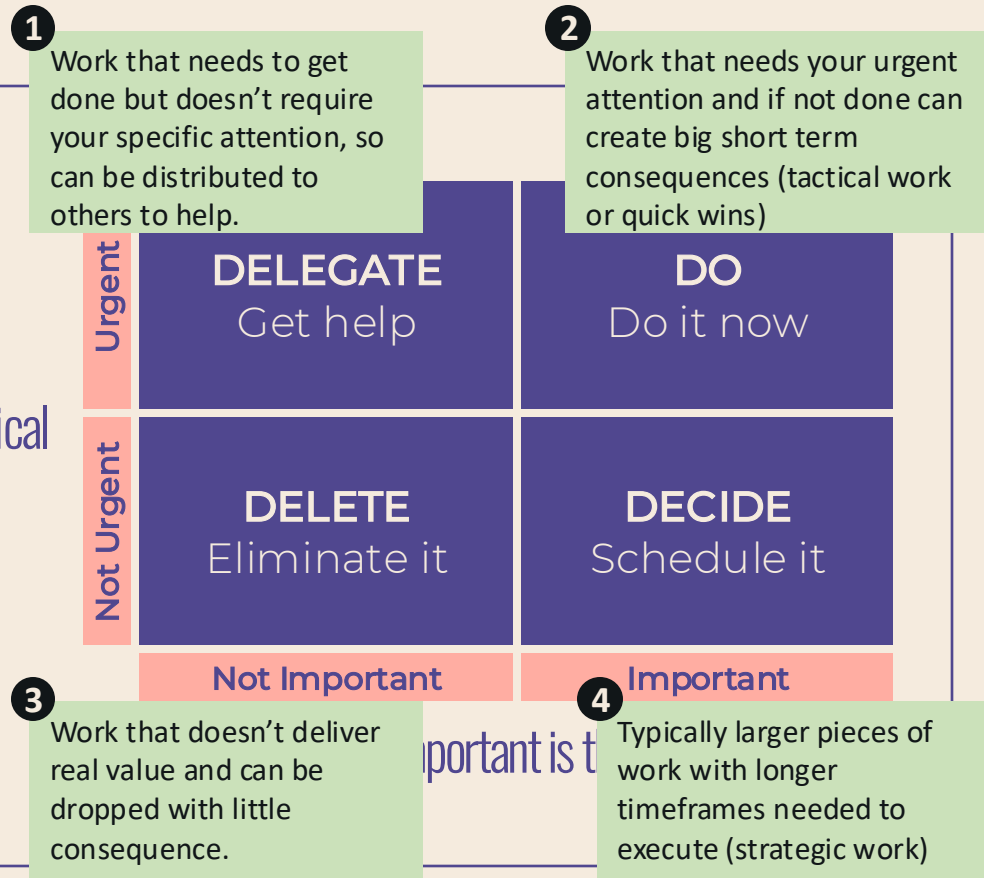
OVERNIGHT STRATEGIST

INSTRUCTIONS

### Eisenhower Box – Mental Model

How time critical  
is the issue?

The Eisenhower Matrix is a popular framework to prioritise work by urgency and importance.



# ABCD

## DECIDE

OVERNIGHT STRATEGIST

FRAMEWORK

+

INSTRUCTIONS

### ABCDs of categorising decisions

Scope & Impact

Broad	<b>Big-bet decisions</b> with major consequences for the company, often involving situations with unclear right or wrong choices	<b>Cross-cutting decisions</b> that are frequent and require broad collaboration across organisational boundaries
Narrow	<b>Ad hoc decisions</b> that arise episodically; impact on broader organisation depends on how concentrated they are	<b>Delegated decisions</b> that can be assigned to individual who is accountable or to the working team
	Unfamiliar, infrequent	Familiar, frequent

Level of Familiarity

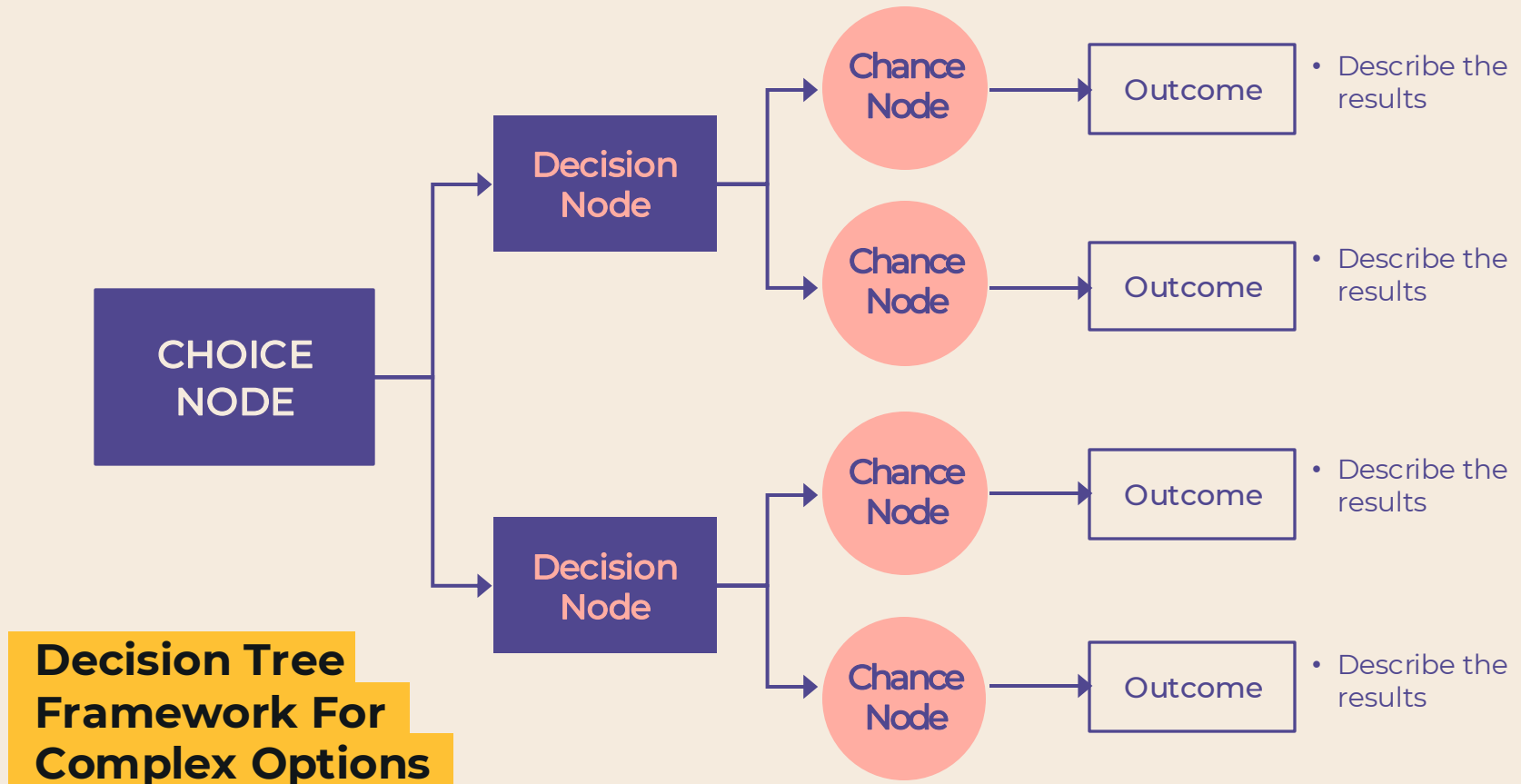
*Ref. McKinsey, Organisational Decision Making Framework*

# Decision Tree

DECIDE

OVERNIGHT STRATEGIST

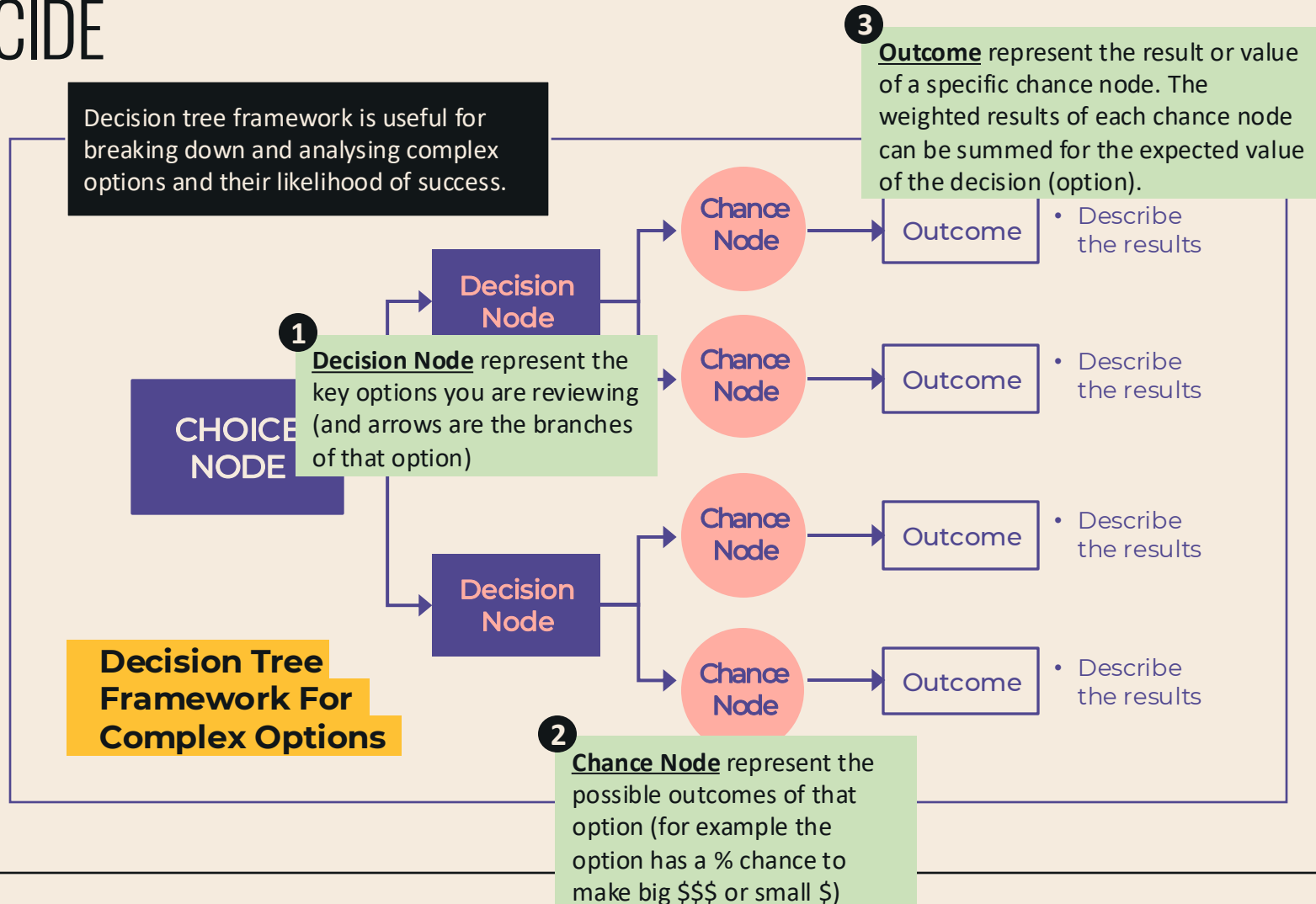
FRAMEWORK





# Decision Tree

## DECIDE



# Pros & Cons

DECIDE

OVERNIGHT STRATEGIST

FRAMEWORK

## Evaluating Options

	Option #1	Option #2	Option #3
Pros	<ul style="list-style-type: none"><li>• Describe the positives or useful features</li><li>• ...</li><li>• ...</li></ul>	<div>Recommended</div> <ul style="list-style-type: none"><li>• Describe the positives or useful features</li><li>• ...</li><li>• ...</li></ul>	<ul style="list-style-type: none"><li>• Describe the positives or useful features</li><li>• ...</li><li>• ...</li></ul>
Cons	<ul style="list-style-type: none"><li>• Describe the negatives or limitations</li><li>• ...</li><li>• ...</li></ul>	<ul style="list-style-type: none"><li>• Describe the negatives or limitations</li><li>• ...</li><li>• ...</li></ul>	<ul style="list-style-type: none"><li>• Describe the negatives or limitations</li><li>• ...</li><li>• ...</li></ul>
	Trade-offs	Trade-offs	Trade-offs

# Pros & Cons

## DECIDE

Simple option evaluation model to start with (before using more complex variation) to describe the trade-off of selecting a specific option.

1

**Option.** Define the set of options to evaluate for a decision.

2

**Criteria.** List the set of pros (positive descriptors or features that match your needs) and set of cons (negative descriptors or gaps)

2

**Trade-offs.** Describe the trade-offs you need to make if you were to pick this option.

### Option #1

- Describe the positives or useful features
- ...
- ...

- Describe the negatives or limitations
- ...
- ...

Trade-offs

### Option #2

- Describe the positives or useful features
- ...
- ...

- Describe the negatives or limitations
- ...
- ...

Trade-offs

### Option #3

- Describe the positives or useful features
- ...
- ...

- Describe the negatives or limitations
- ...
- ...

Trade-offs

Recommended

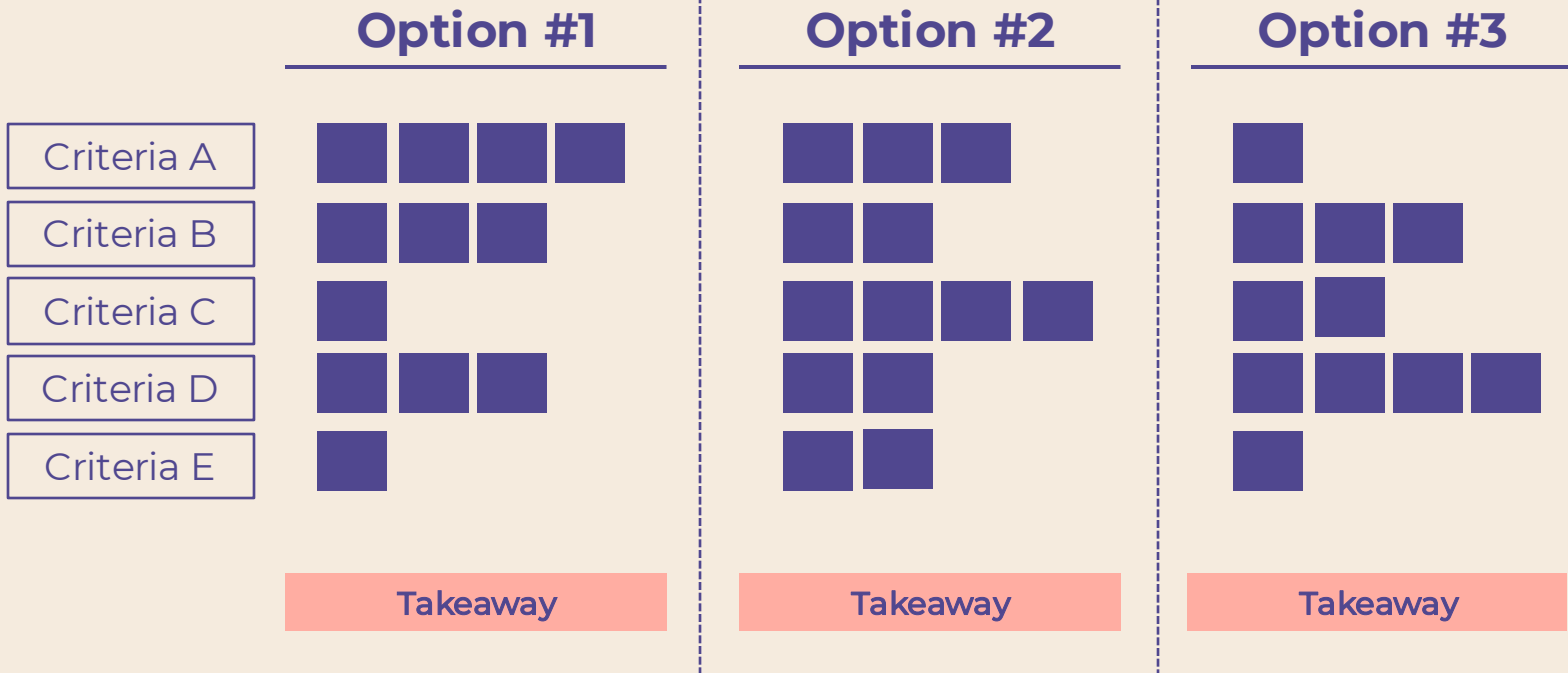
# Evaluation

## DECIDE

OVERNIGHT STRATEGIST

FRAMEWORK

### Evaluating Options



# Evaluation

## DECIDE

Option evaluation models work by defining a standard set of criteria we can apply and rate consistently for each scenario.

1

**Option.** Define a set of distinctly different options you need to objectively review to inform a decision.

2

**Criteria.** Select a set of criteria that you can use to rate each option. [Optional] You can also weight each criteria score and create a weighted average result for the scenario.

3

**Takeaway.** Summarise your results for each option into where it shines vs. lacks. This will inform your recommendation and the rationale for the selection.

### Evaluating Options

	Option #1	Option #2	Option #3
Criteria A	<div></div> <div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div>
Criteria B	<div></div> <div></div> <div></div>	<div></div> <div></div>	<div></div> <div></div> <div></div>
Criteria C	<div></div>	<div></div> <div></div> <div></div> <div></div>	<div></div> <div></div>
Criteria D	<div></div> <div></div> <div></div>	<div></div> <div></div>	<div></div> <div></div> <div></div> <div></div>
Criteria E	<div></div>	<div></div> <div></div>	<div></div>
	Takeaway	Takeaway	Takeaway

Recommended

# Bezos

## DECIDE

OVERNIGHT STRATEGIST

FRAMEWORK

### 'Invention Machine' – Amazon Decision Making Framework

#### Type I Decisions

#### 1 Way Doors Consequential, and Irreversible Decisions

Decisions must be made carefully, methodically and with great deliberation.

#### Type II Decisions

#### 2 Way Doors Changeable, and Reversible Decisions

Act with only 70% of the data and if there is enough evidence the decision will benefit customers.

*Ref. Jeff Bezos, Letter to Amazon Shareholders 2015*

# Bezos

## DECIDE

Amazon's blueprint for high speed and high quality decision making - using the concept of type I and type II decisions.

### 'Invention Machine' – Amazon Decision Making Framework

#### Type I Decisions

#### 1 Way Doors Consequential, and Irreversible Decisions

Decisions must be made carefully, methodically and with great deliberation.

*Ref. Jeff Bezos, Letter to Amazon Shareholders 2015*

#### Type II Decisions

#### 2 Way Doors Changeable, and Reversible Decisions

Act with only 70% of the data and if there is enough evidence the decision will benefit customers.

**1** Type I Decisions are the heavy decisions which are difficult to reverse and therefore require a longer timeframe for analysis, discussion and option evaluation. This typically involves more stakeholders and senior decision makers.

**2** Type II Decisions are reversible decisions which means the consequences are low enough that decisions can be made by the empowered team or leader knowing even if they got it wrong, the impact won't be catastrophic for the business.

# SPADE

## DECIDE

OVERNIGHT STRATEGIST

FRAMEWORK

### Square's Decision Making Framework

S etting	P eople	A lternatives	D ecide	E xplain
What	Consult	Feasible	Private Vote	Buy-in
Why	Approve	Diverse	Choose	Articulate
When	Responsible	Thorough		Commit
Precisely captures the decision	People involved in the decision	Describe varied views and their pros & cons	Consider the votes and make the decision	Explain the rationale for the decision

*Ref. Gokul Rajaram. Square's Framework For Difficult Decisions via First Round Review*



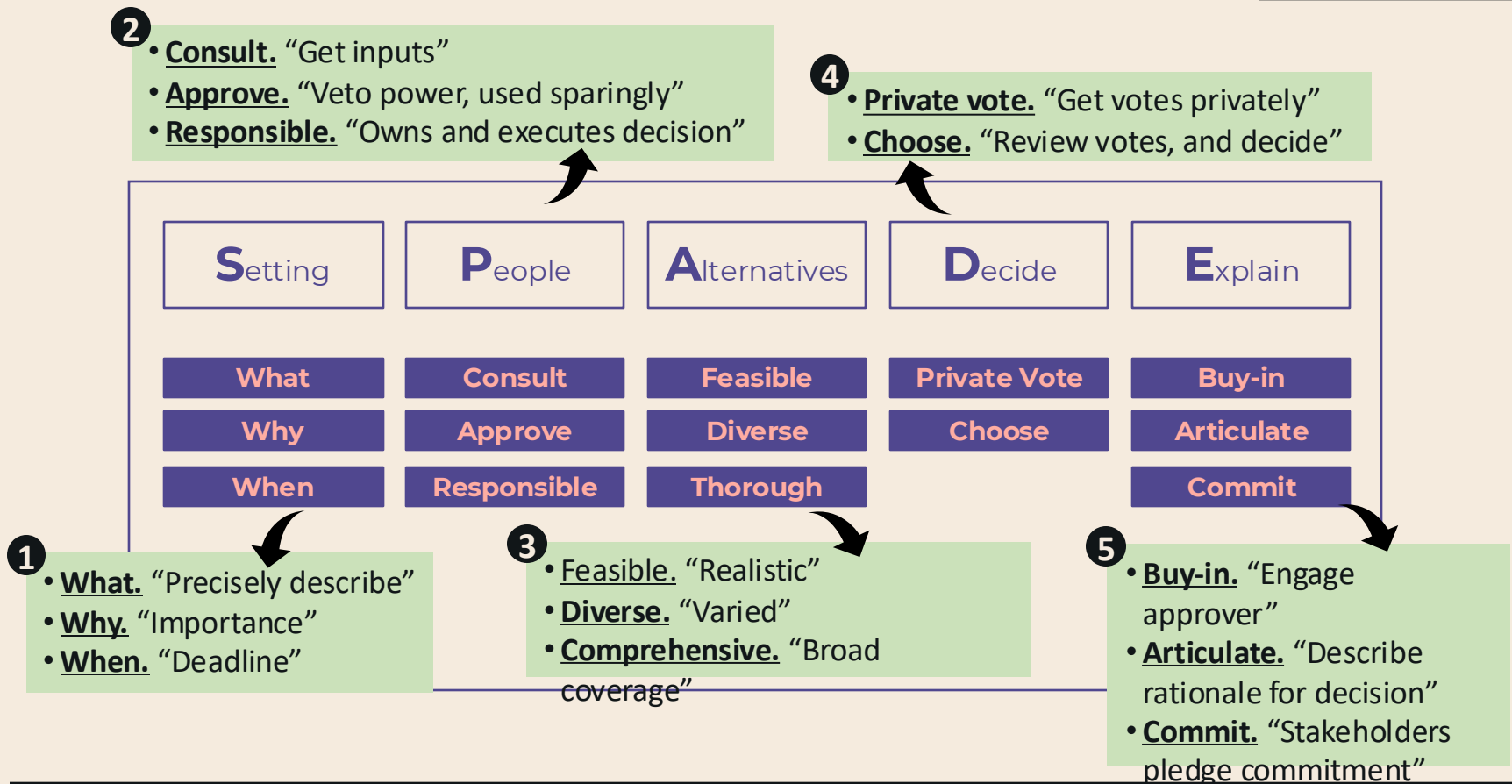
# SPADE

## DECIDE

OVERNIGHT STRATEGIST

FRAMEWORK

Framework for  
difficult decisions  
used at Square



# Bull & Bear

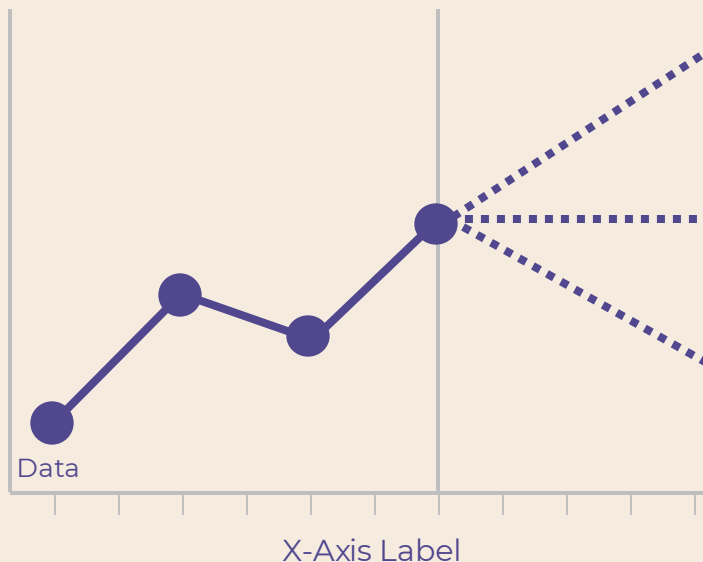
## DECIDE

OVERNIGHT STRATEGIST

FRAMEWORK

### Chart Title

units



Bull

- Opportunity or gains in an optimistic "bull case" scenario

Base

- Results if we extrapolate the trend forward in "base case"

Bear

- Worse case scenario if things go horribly wrong in the "bear case"

# Bull & Bear

## ANALYSE

Bull – bear case scenarios is useful to present a set of possible scenarios so decision makers are clear on the upside and downside of a decision.

### Chart Title

units

Create the actuals + project results over time for optimistic, neutral and pessimistic scenarios and plot each on the line chart with a demarcation between actual (bold line) and projected (dotted line)

Data

X-Axis Label

Bull

- Opportunity or gains in an optimistic "bull case" scenario

Base

- Results if we extrapolate the trend forward in "base case"

Bear

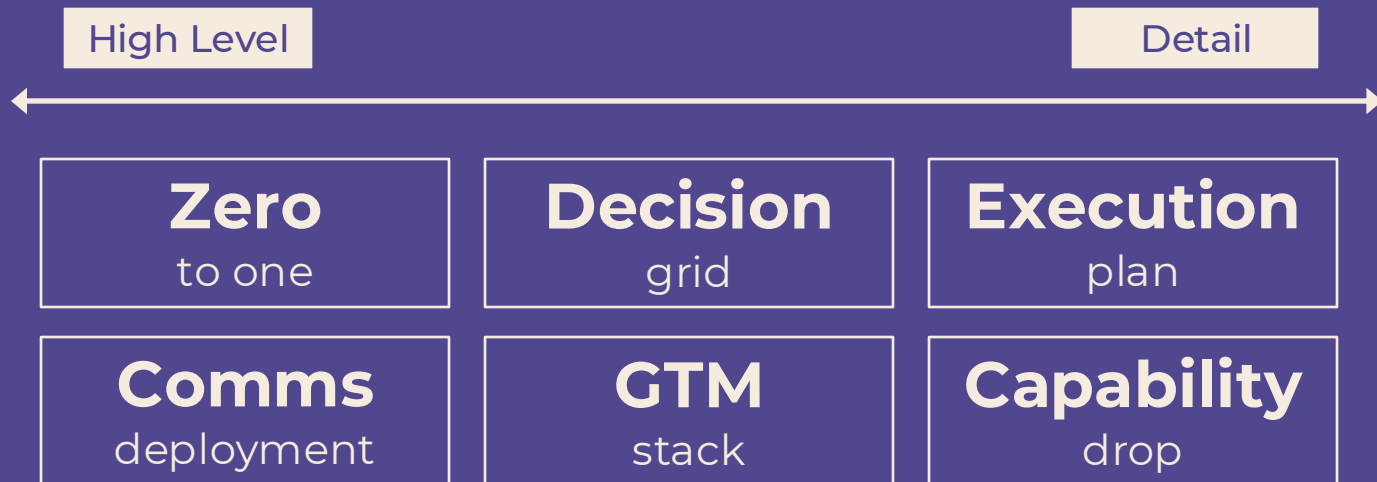
- Worse case scenario if things go horribly wrong in the "bear case"

Describe the results of the bull vs. base vs. bear case scenarios to the right of the chart. Optional: add % likelihood of occurring to each scenario.

# Act

OVERNIGHT STRATEGIST

## Implementation Plans



# Zero To One

Act

OVERNIGHT STRATEGIST

FRAMEWORK

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INSTRUCTIONS

## Getting from start line to launch



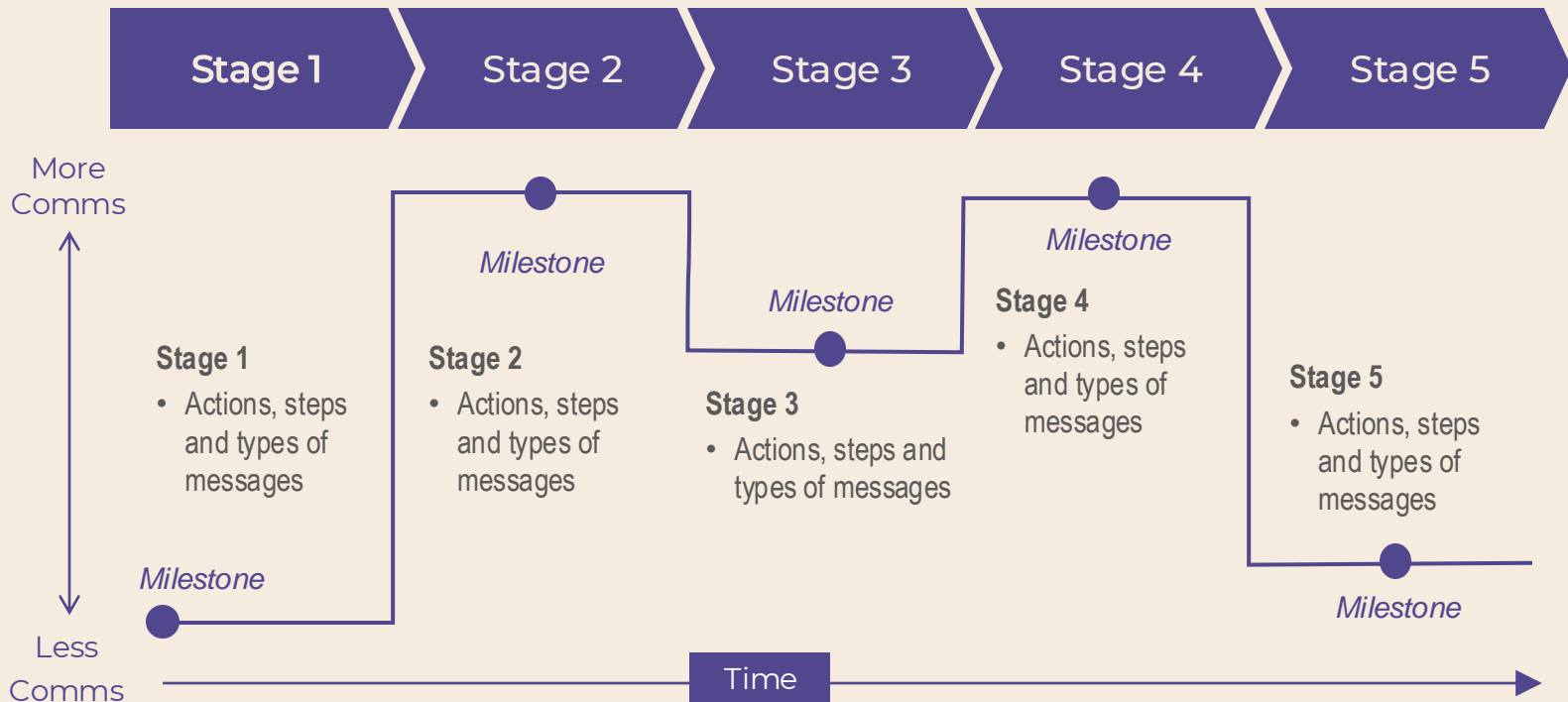
# Comms Deploy

Act

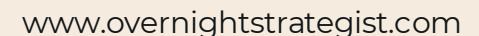
OVERNIGHT STRATEGIST

FRAMEWORK

## Communications deployment plan



# Act



# Decision Grid

OVERNIGHT STRATEGIST

FRAMEWORK

Act

Key Decisions

Week 1

Week 2

Week 3

Week 4

Lead

Stream 1

1

2

5

7

Stream 2

3

6

Stream 3

4



# Decision Grid

OVERNIGHT STRATEGIST

INSTRUCTIONS

Act

Decision Grid is useful for larger companies that require a clear view of the set of key decisions the steering committee is required to make to progress the work.

Key Decisions

Week 1

Week 2

Week 3

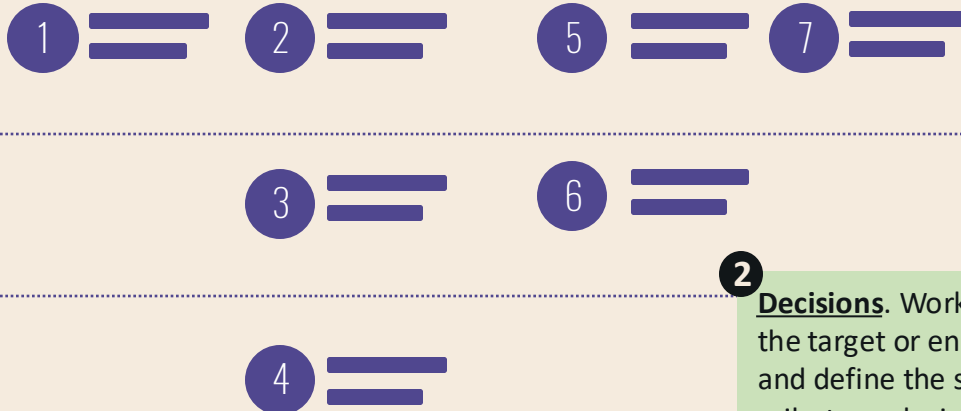
Week 4

**1** Workstream. Define the workstreams required to deliver the strategic initiative and assign the responsible leader.

Lead

Stream 2

Stream 3



**2** Decisions. Work back from the target or end outcome and define the set of key milestone decisions required by the group.

# GTM Stack

OVERNIGHT STRATEGIST

FRAMEWORK

Act

## Go-To-Market Stack

Product & Marketing

PRODUCT, PRICING & PROMOTION

Product Details & Key Messaging

Channel Enablement

FRONTEND CHANNELS

Channel 1

Channel 2

Channel 3

Backend Platforms

BACKEND SYSTEMS & SUPPORT

System 1

System 2

Compliance

Finance/  
Accounting

Legal T&C's

Reporting

# GTM Stack

OVERNIGHT STRATEGIST

INSTRUCTIONS

Act

## Go-To-Market Stack

Product & Marketing

Channel Enablement

Backend Platforms

Compliance

### PRODUCT, PRICING & PROMOTION

Product Details & Key Messaging

1

Identify the GTM blocks for product/price and messaging or comms.

### FRONTEND CHANNELS

Channel 1

Channel 2

Channel 3

2

Include all impacted channels for example, retail, digital, inbound/outbound sales and call centre service

### BACKEND SYSTEMS & SUPPORT

System 1

System 2

Finance/  
Accounting

Legal T&C's

Reporting

3

Include all impacted channels for example, retail, digital, inbound/outbound sales and call centre service

Unique way to visualise the component parts of a go-to-market (GTM). To be used as a high level visual before doing the double click on each GTM block.

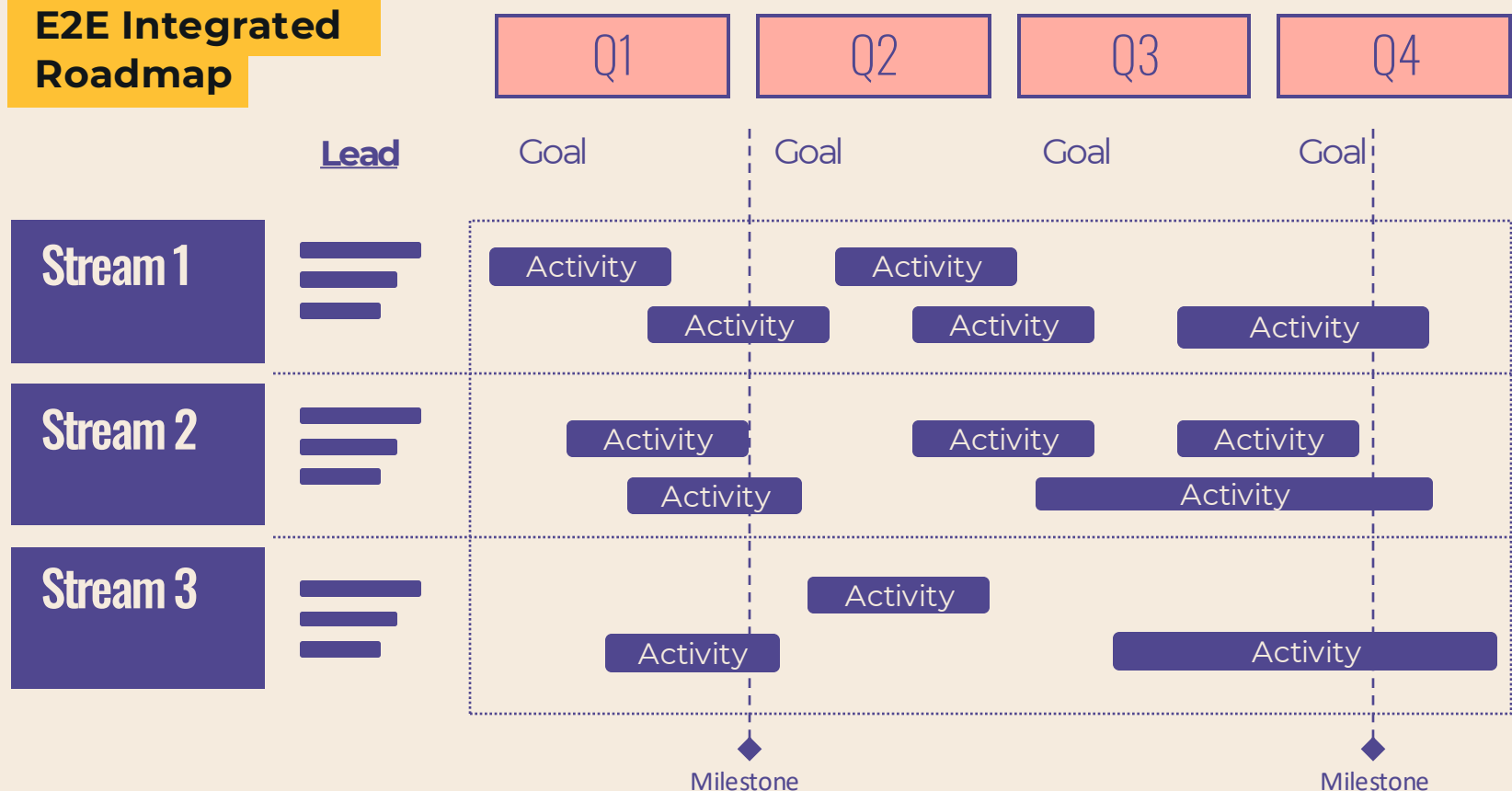
# Execution Plan

OVERNIGHT STRATEGIST

FRAMEWORK

Act

E2E Integrated  
Roadmap



# Execution Plan

Act

Visual for the implementation of the strategy, including the sequence of activity by workstream.

**E2E Integrated Roadmap**

Lead

**Stream 1**

**Stream 2**

**Stream 3**

Q1

Q2

Q3

Q4

Goal

Goal

Goal

Goal

Activity

Activity

Activity

Activity

Activity

Activity

Activity

Activity

Activity

Activity

Activity

Activity

Activity

Milestone

Milestone

**2 Time.** Chunk down the time blocks from start to launch, with goals for each phase.

**3 Activity.** Describe the sequence of major activity in each work stream.

**4 Milestone.** Callout the major milestones in the execution plan.

**1 Workstream.** Define the workstreams required to deliver the strategic initiative.

# Capability Drop

Act

OVERNIGHT STRATEGIST

FRAMEWORK

Capability Roadmap		Q1	Q2	Q3	Q4
Lead		Theme	Theme	Theme	Theme
Stream 1	<div></div>	<div>Capability</div> <div>Capability</div>	<div>Capability</div>	<div>Capability</div>	<div>Capability</div> <div>Capability</div>
Stream 2	<div></div>	<div>Capability</div>	<div>Capability</div> <div>Capability</div>	<div>Capability</div>	<div>Capability</div> <div>Capability</div>
Stream 3	<div></div>	<div>Capability</div> <div>Capability</div>	<div>Capability</div>	<div>Capability</div> <div>Capability</div>	<div>Capability</div>

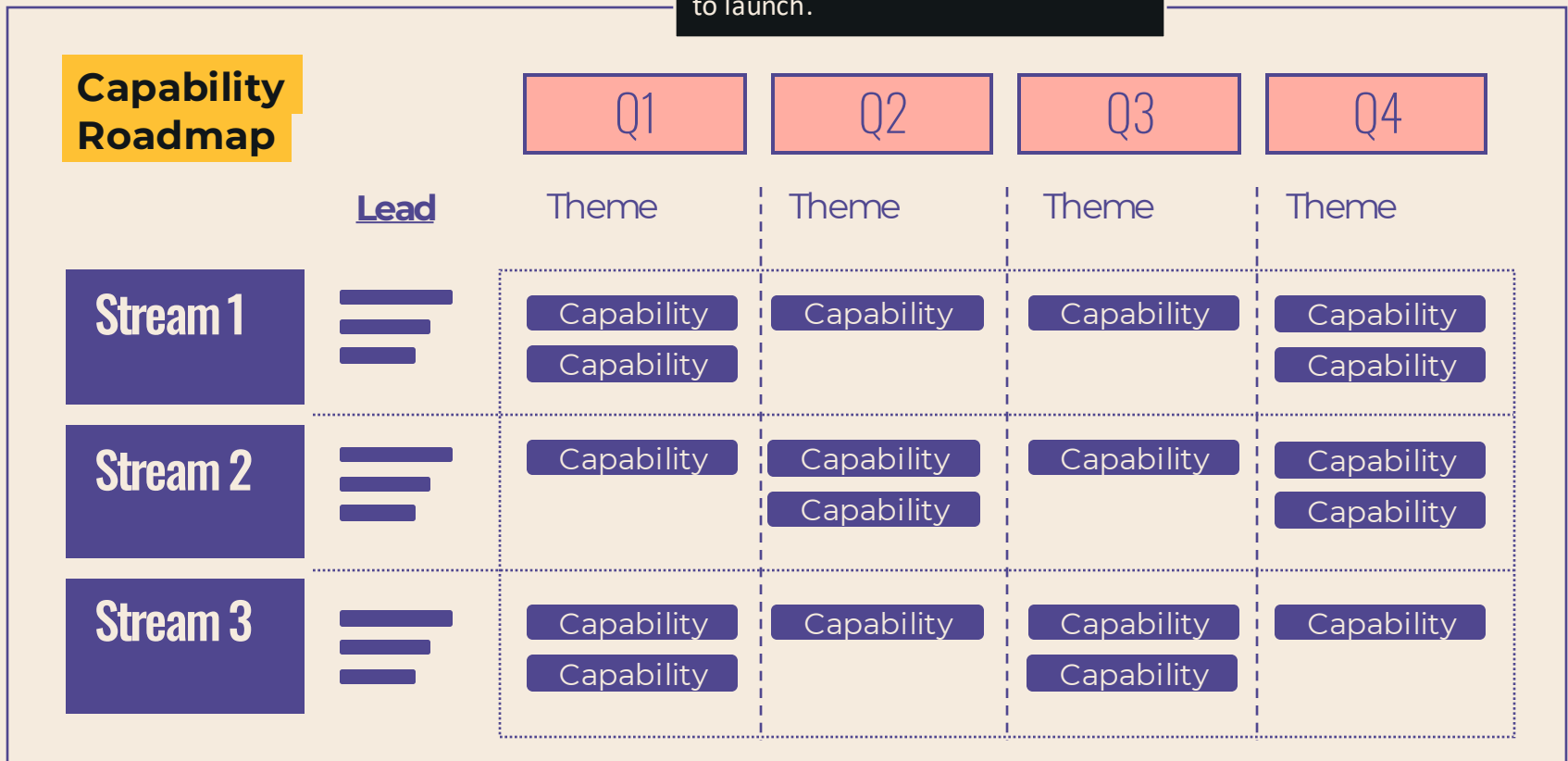
# Capability Drop

OVERNIGHT STRATEGIST

INSTRUCTIONS

Act

An alternate to the traditional Gantt style roadmap showing the time period a feature or capability is likely to launch.



# THANK YOU!