

FOR THINKERS - INNOVATORS - MAKERS - CONSULTANTS - COACHES - FREELANCERS - ENTREPRENEURS - DESIGNERS

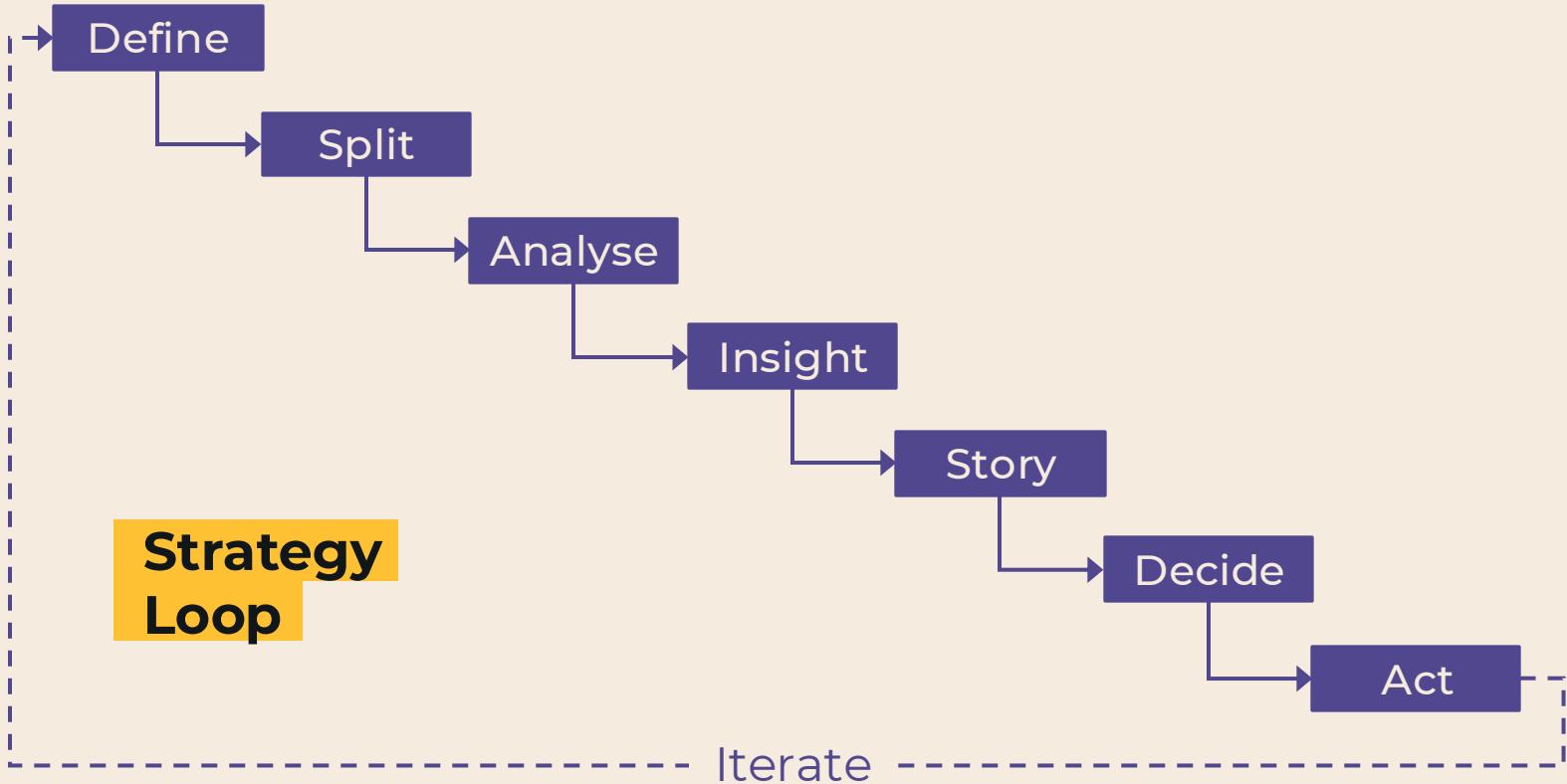
# overnight strategist

## Strategist Toolkit

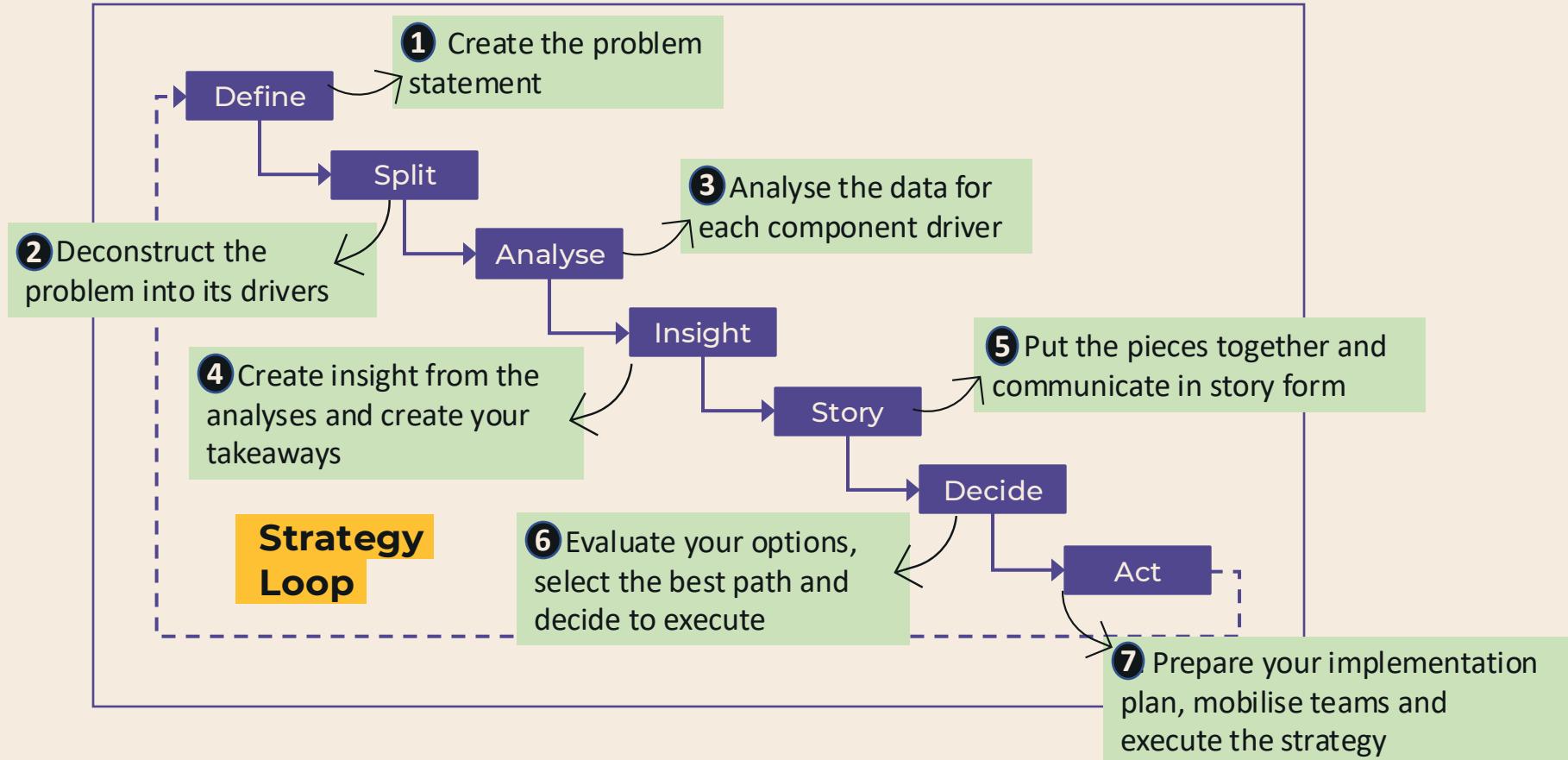
70 stylish, modern frameworks to help you create your next strategy using a simple 7-step strategic thinking model



# Strategic Thinking

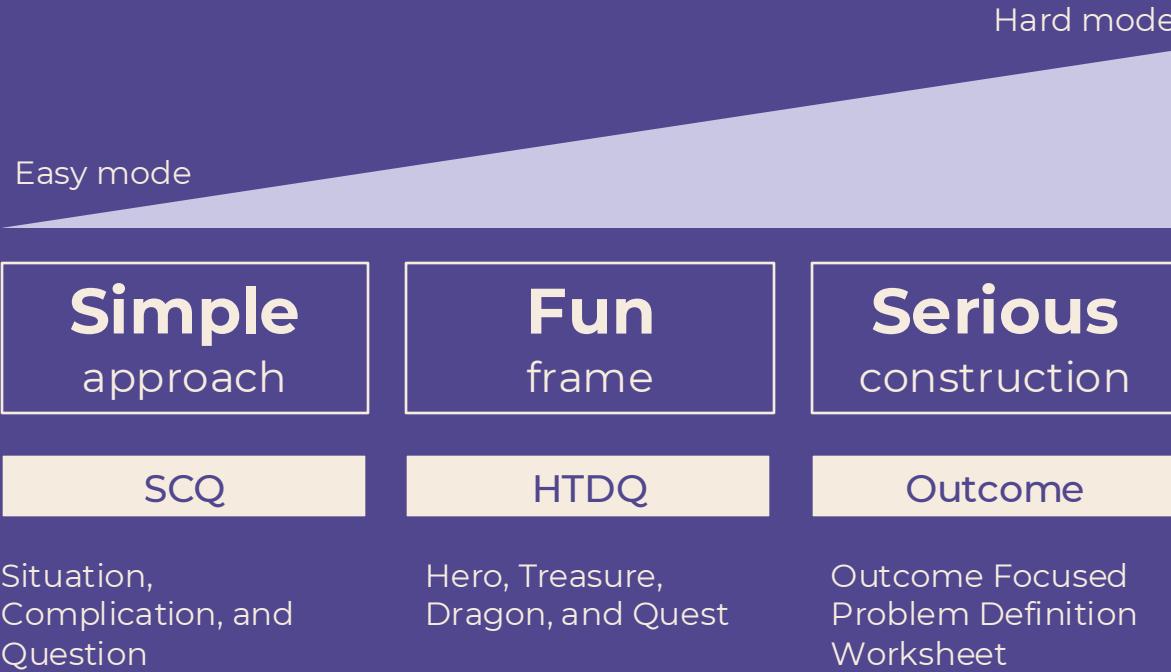


# Strategic Thinking



# Define

## Problem Definition Frameworks

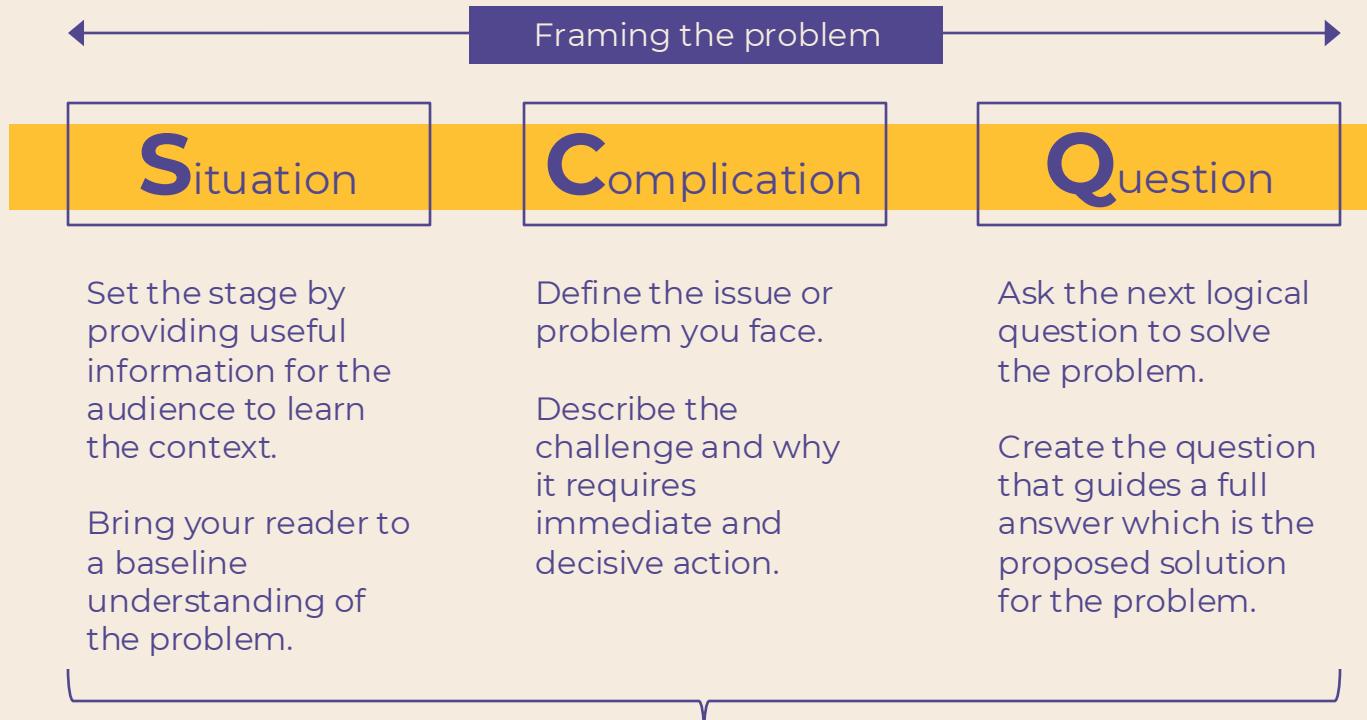


# SCQ

## DEFINE

OVERNIGHT STRATEGIST

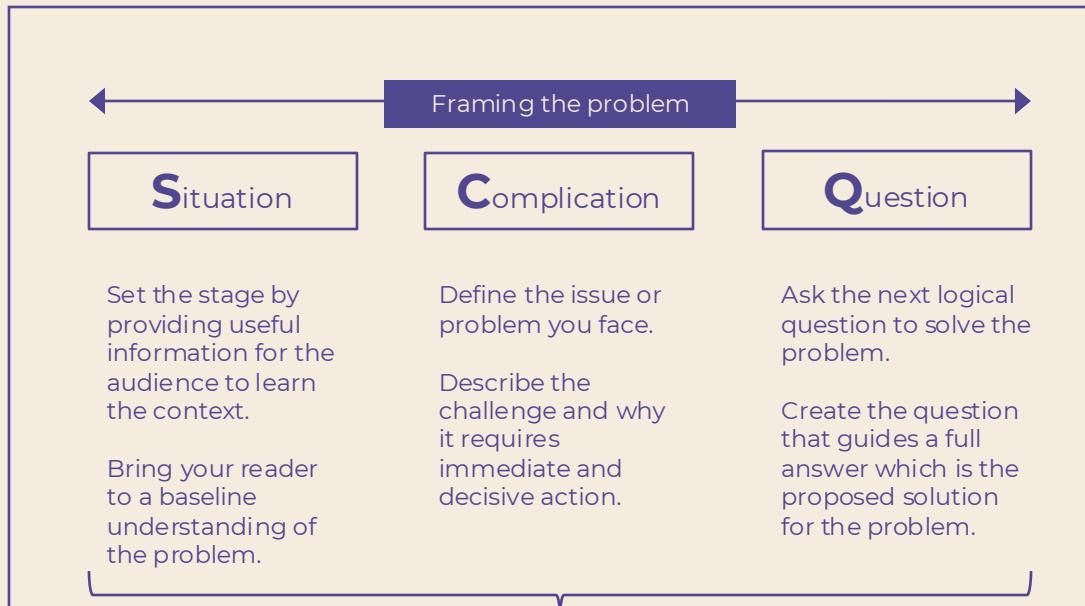
FRAMEWORK



*Construct the problem statement by combining & summarising the 'situation' & 'complication'*

# SCQ

## DEFINE



State the problem ->

Example:

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

## OVERNIGHT STRATEGIST

### INSTRUCTIONS

S

#### Set the stage ->

**S**ituation

Set the stage by providing useful information for the audience to learn the context.

Bring your reader to a baseline understanding of the problem.

**C**omplication

Define the issue or problem you face.

Describe the challenge and why it requires immediate and decisive action.

**Q**uestion

Ask the next logical question to solve the problem.

Create the question that guides a full answer which is the proposed solution for the problem.

C

#### Intro the problem: ->

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.

Q

#### Ask the question ->

Example:

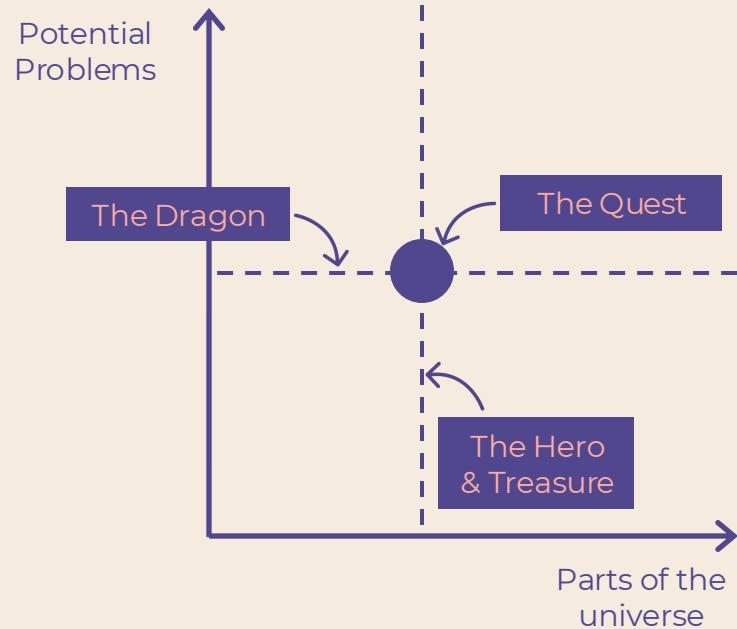
How can Acme Design turnaround its subscriber sales?

# HTDQ

## DEFINE

### Hero-Treasure-Dragon-Quest Sequence

<b>Hero</b>	Information and context needed to specify the part of the 'universe of interest'
<b>Treasure</b>	The hero's aspiration
<b>Dragon</b>	The one problem separating the hero from the treasure
<b>Quest</b>	The overarching question that you are solving, phrased as: How should <b>[the hero]</b> get <b>[the treasure]</b> , given <b>[the dragon]</b> ?



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 plateaued 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

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]?

Potential Problems

The Dragon

The Quest

The Hero & Treasure

Parts of the universe

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

✓ **C**riteria

✓ **F**orces

✓ **T**imeframe

✓ **C**onstraints

✓ **A**ccuracy

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

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

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

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

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

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

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

# Outcome

## DEFINE

INSTRUCTIONS

### S 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 Decider

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



### C Criteria

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



### F Forces

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



### T Timeframe

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



### C Constraints

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



### A Accuracy

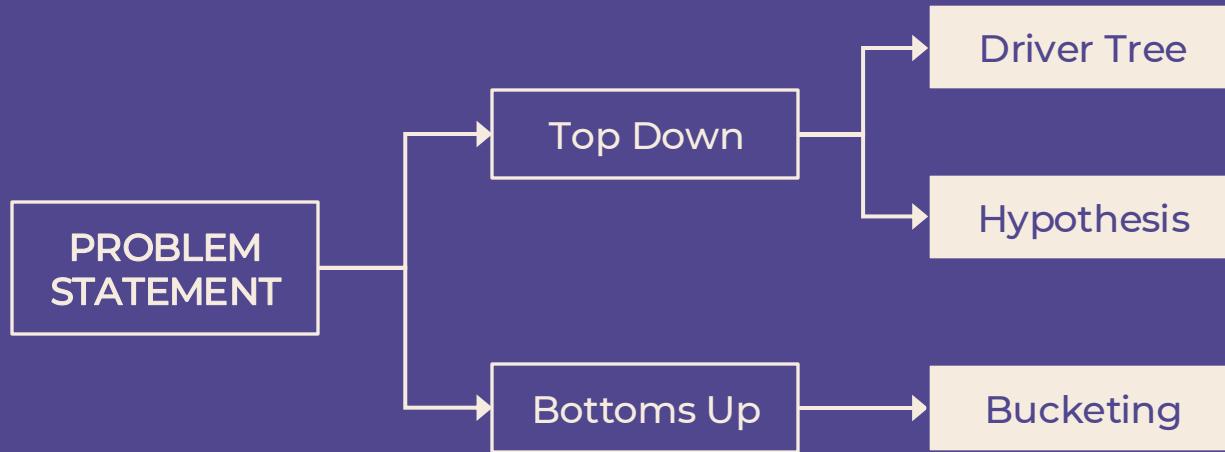
**Accuracy necessary.** What level of accuracy is needed?

: McLean, Bulletproof Problem Solving, Problem Definition Worksheet

Construct the "Problem Definition Worksheet" using these components.

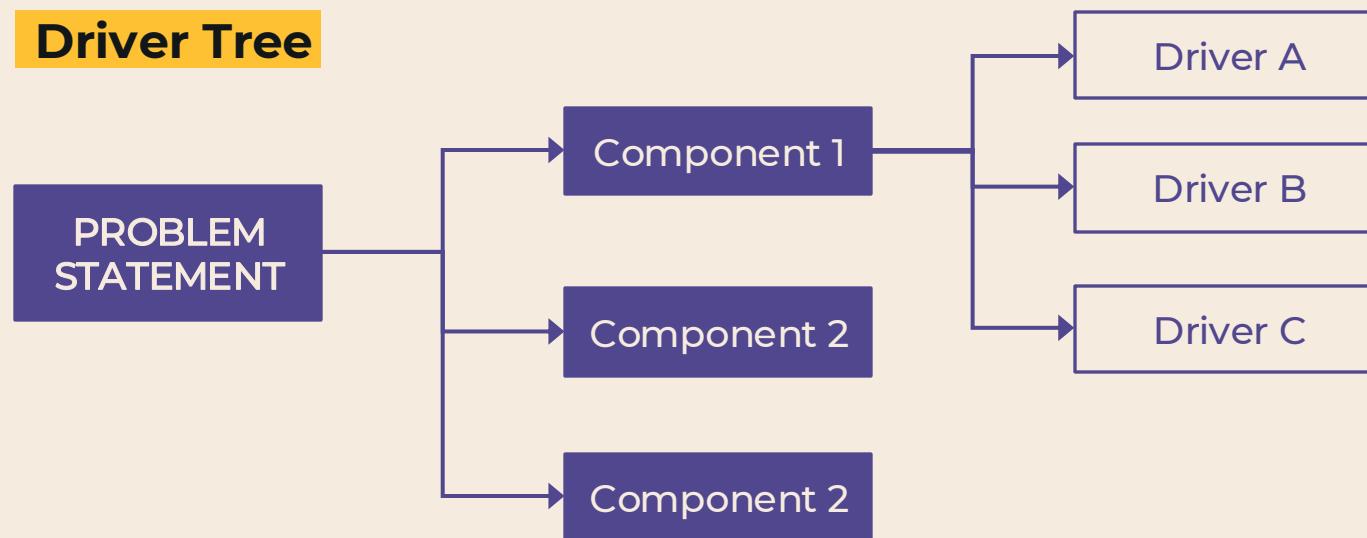
# Split

## Methods to Break Down Problems



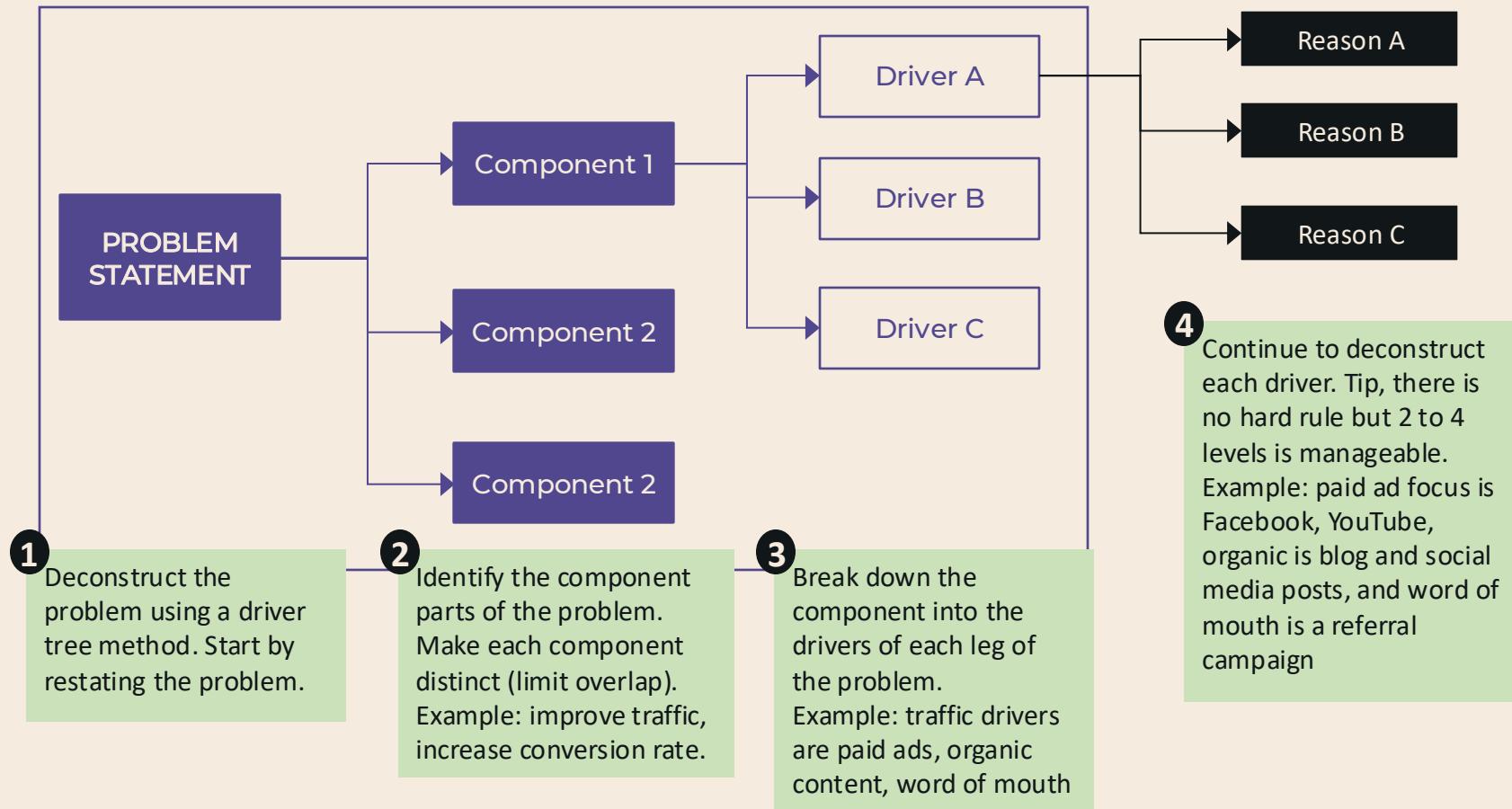
# Driver Tree

SPLIT



# Driver Tree

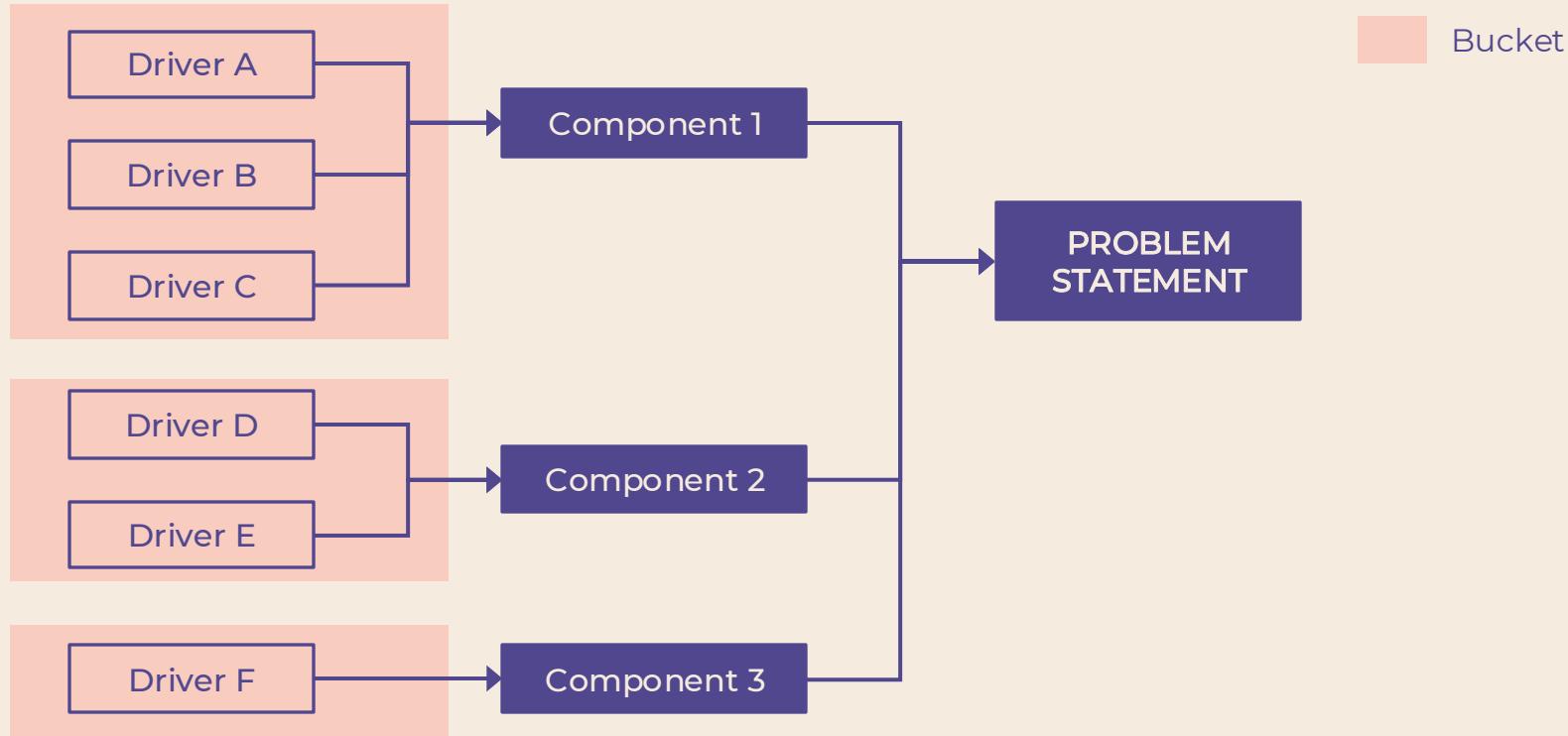
## SPLIT



# Bucketing

SPLIT

## List and Bucket Ideas



# Bucketing

## SPLIT

**1** Start by listing the component parts of the problem.

### List and Bucket Ideas

**2** Create logical groupings based on similar characteristics of the components

Driver A

Driver B

Driver C

Driver D

Driver E

Driver F

Component 1

Component 2

Component 3

Bucket

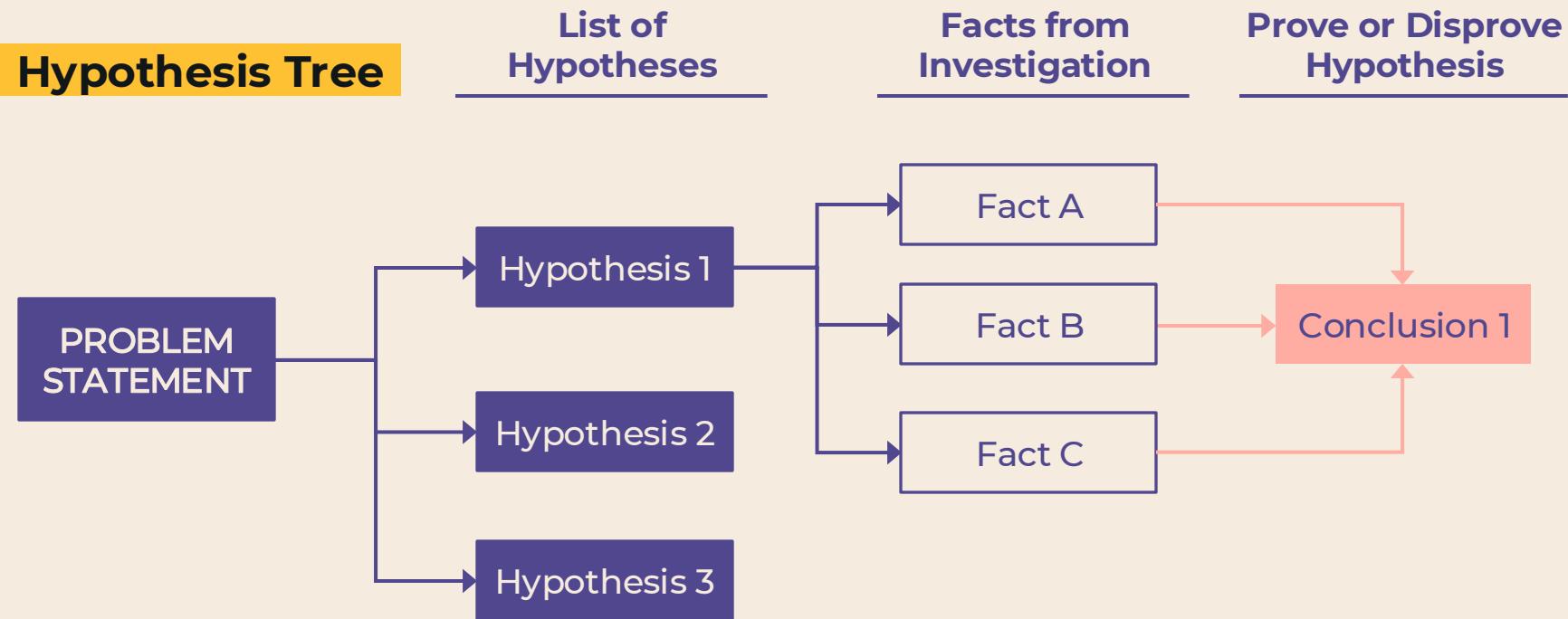
PROBLEM STATEMENT

**3** The buckets should form big branches of this tree diagram and make up the main drivers of the problem.

**4** Optional: Restate or sharpen the problem statement based on the organised drivers.

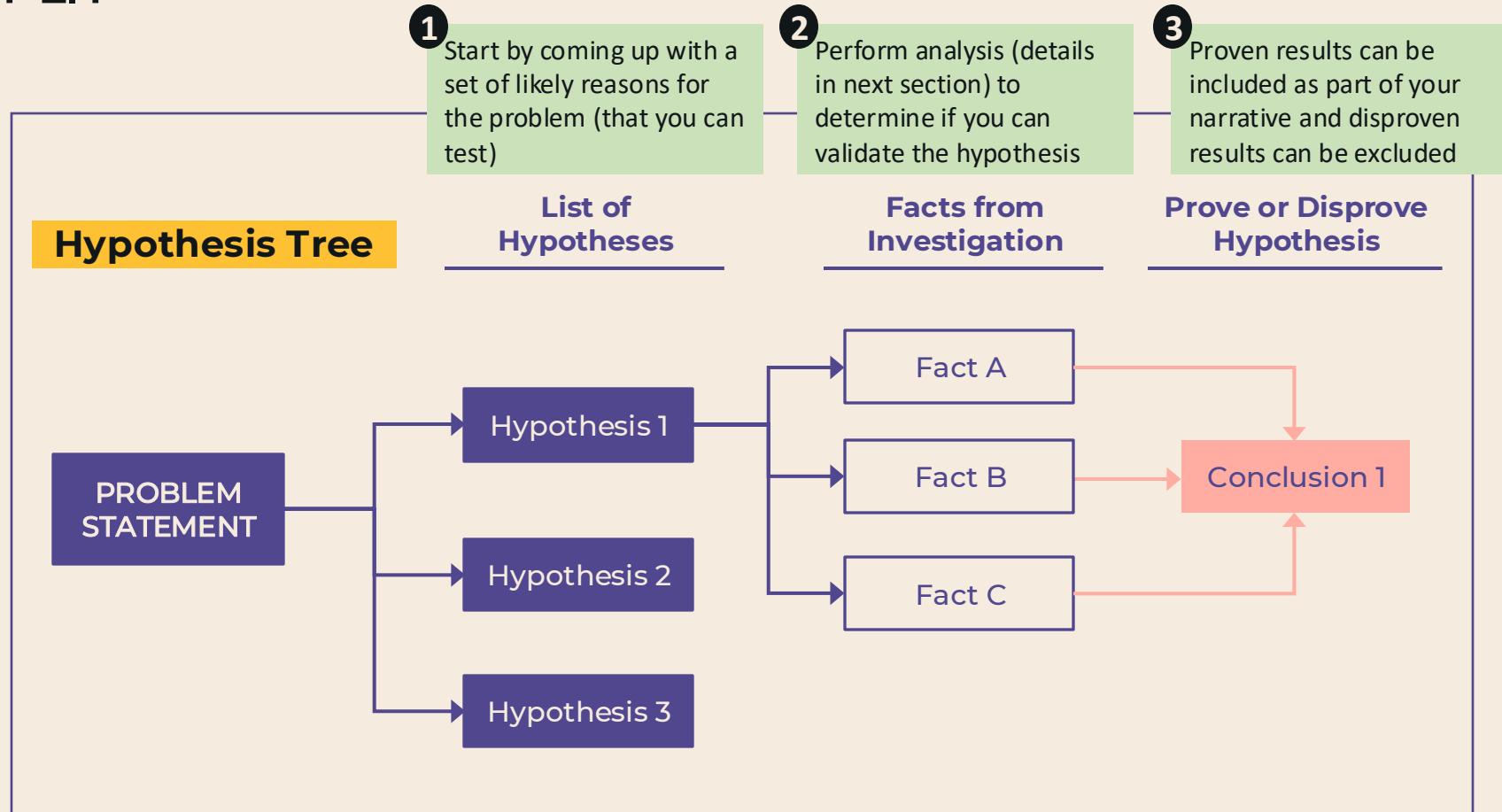
# Hypothesis

SPLIT



# Hypothesis

SPLIT



# Analyse



# Trend ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

Chart Title

units

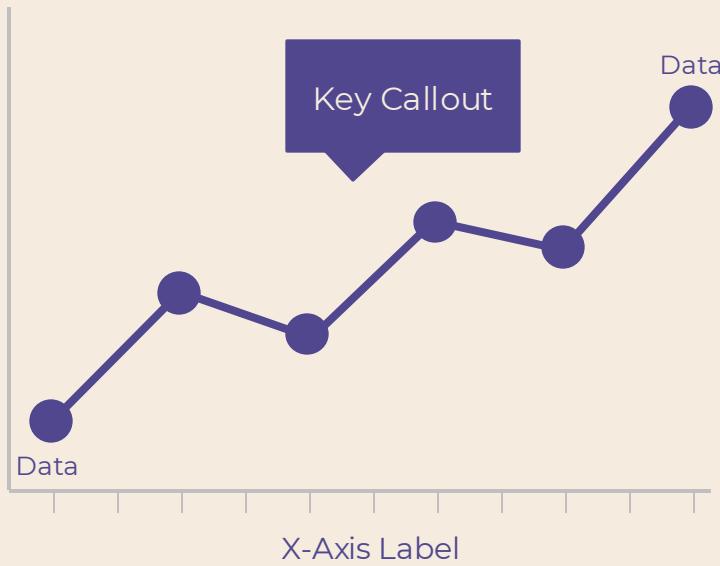
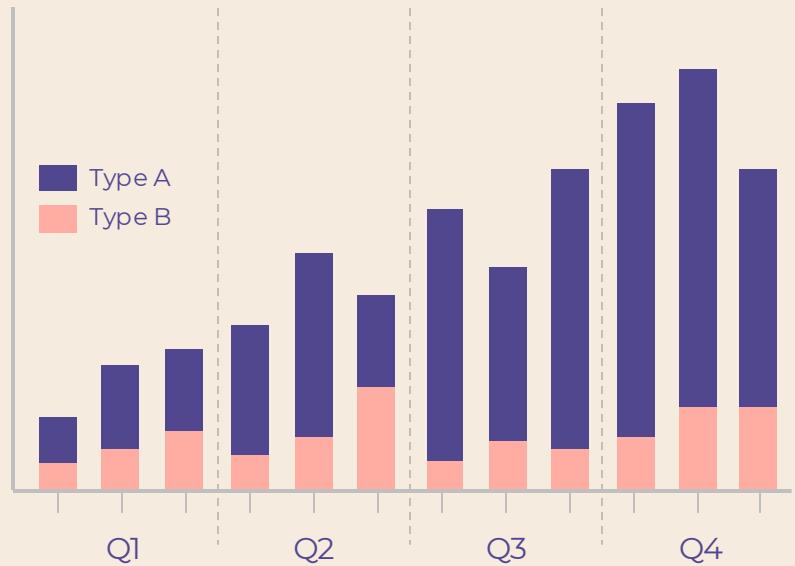


Chart Title

units

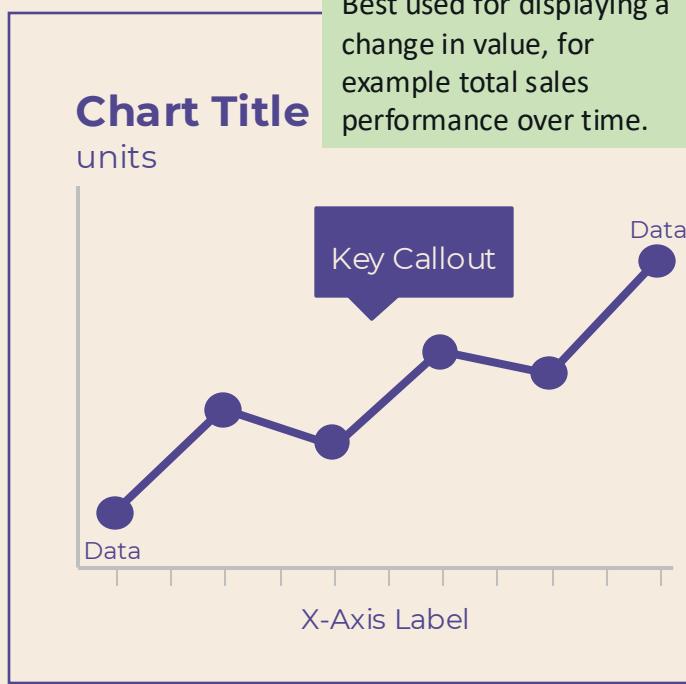


# Trend ANALYSE

1

**Line chart:**

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



2

**Stacked bar chart:**

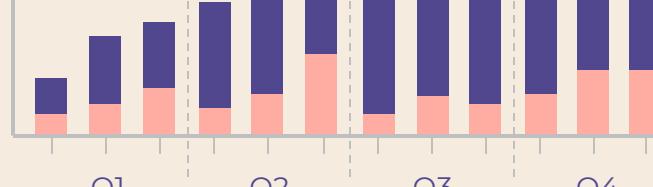
Best used when you want to also show change in value and mix, for example sales of product A &B over time.

**Chart Title**

units

Type A

Type B

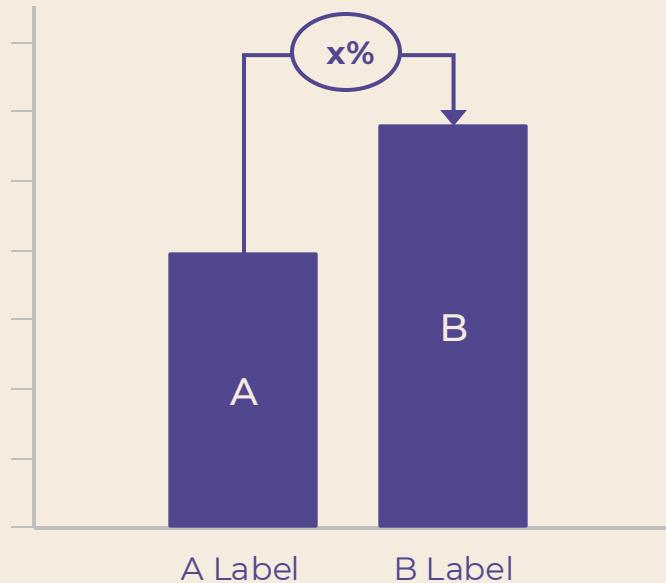


# Comparison

## ANALYSE

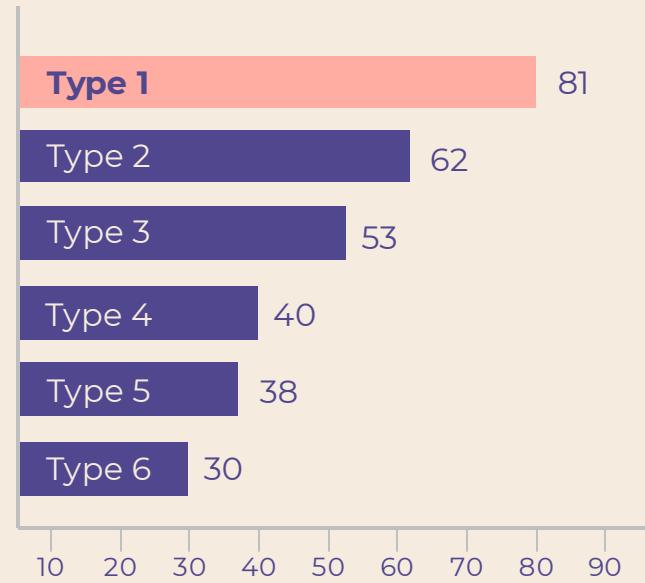
**Chart Title**

units



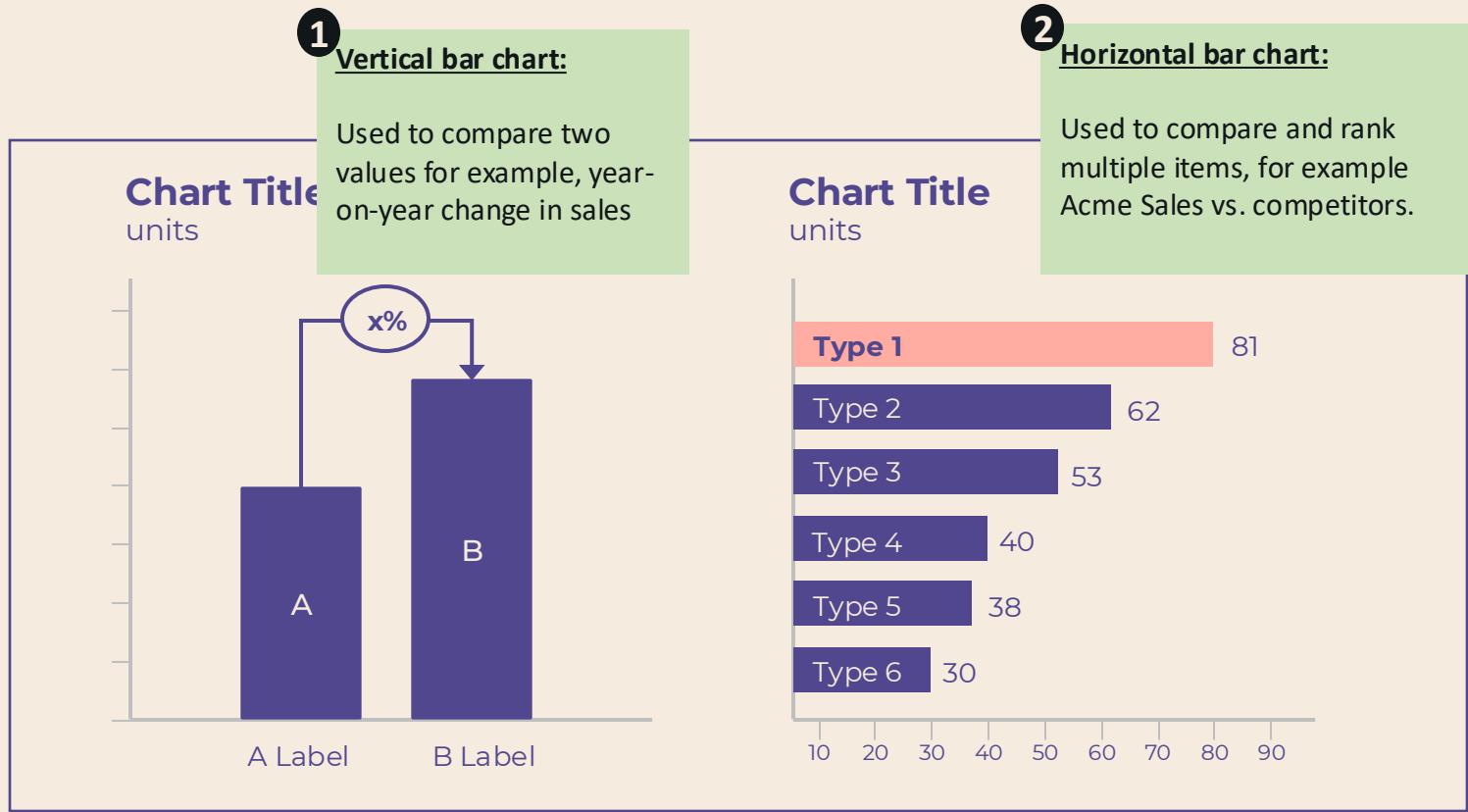
**Chart Title**

units



# Comparison

## ANALYSE



# Mix

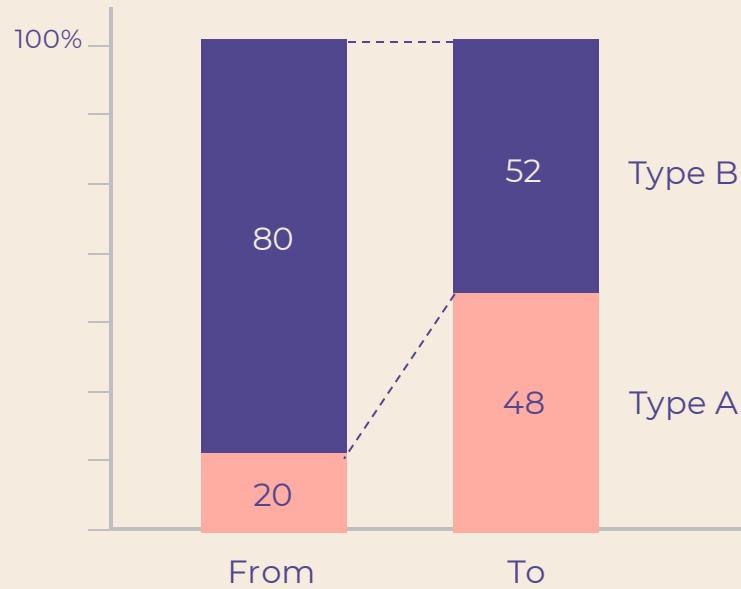
## ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

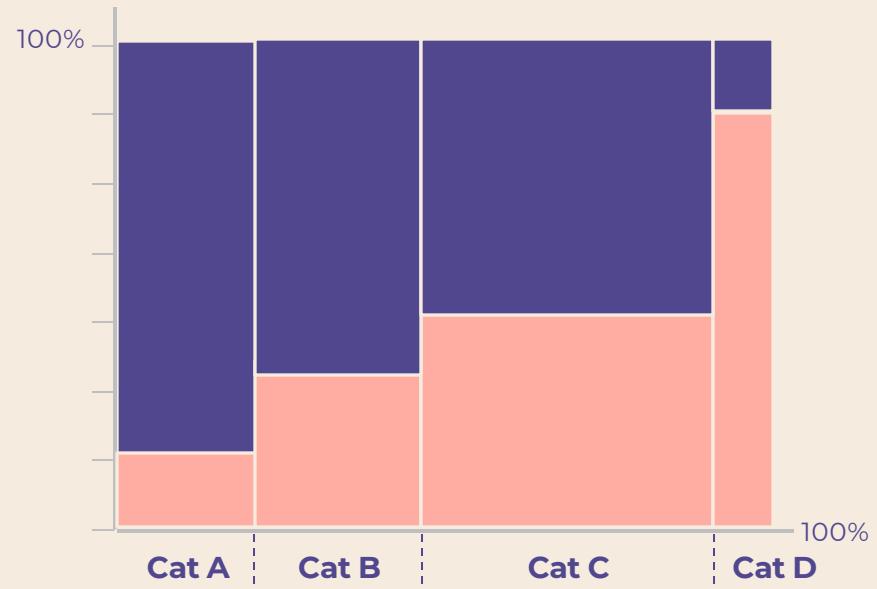
**Chart Title**

units



**Chart Title**

units



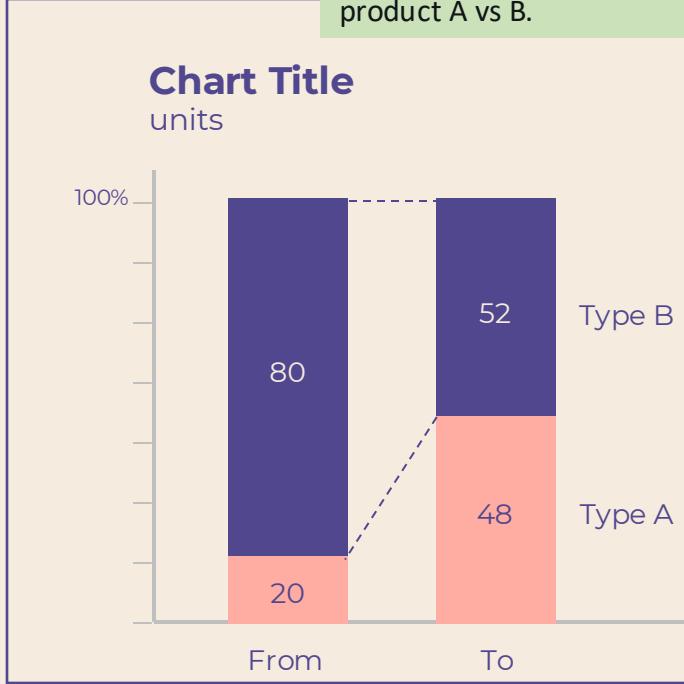
# Mix

## ANALYSE

1

### Stacked bar chart:

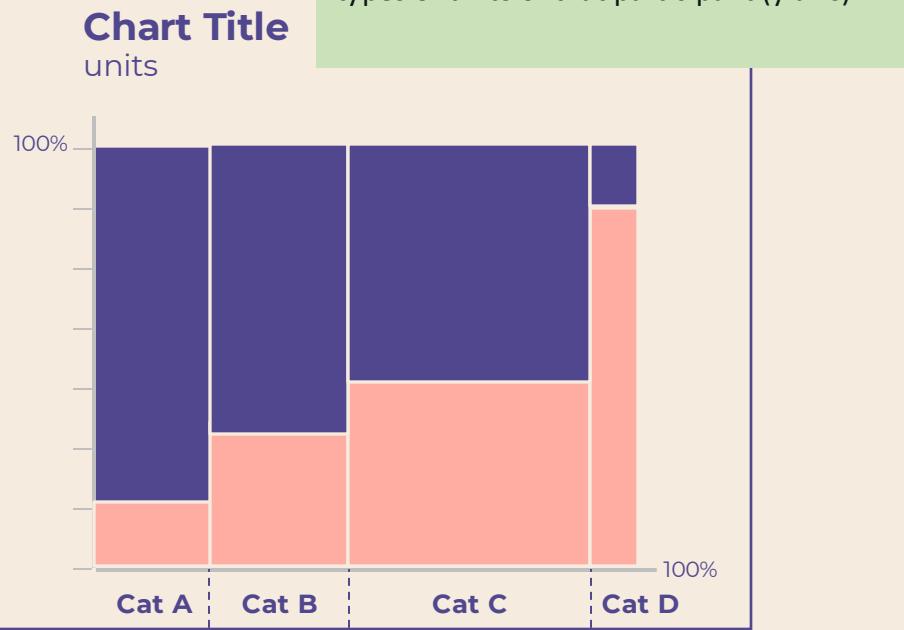
Used to show change in % mix between 2 time periods, for example share of sales of product A vs B.



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

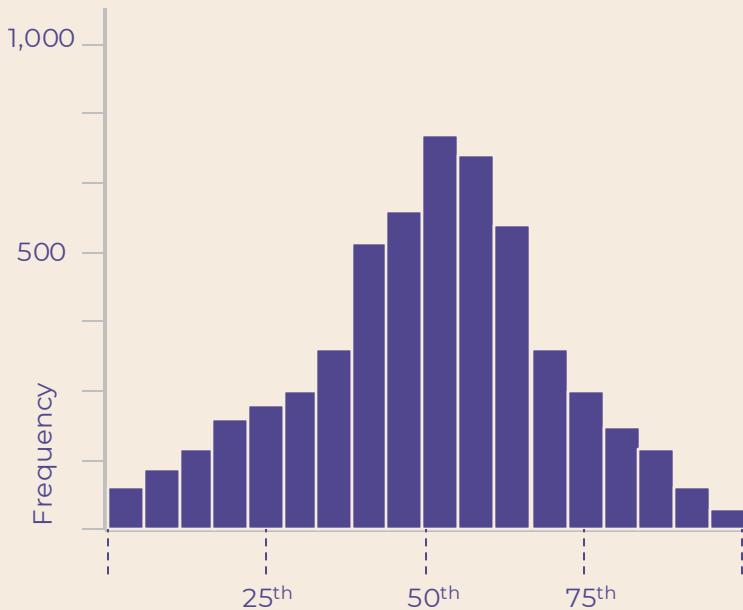


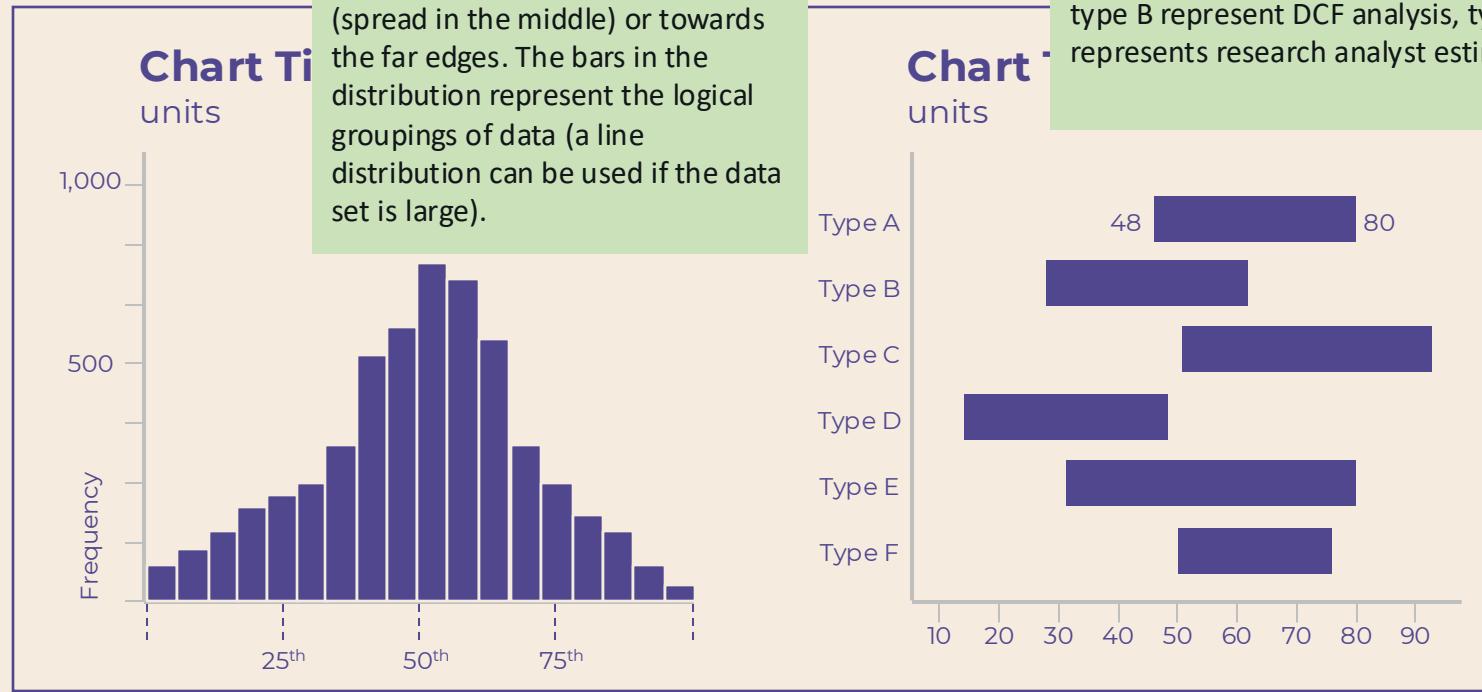
Chart Title

units



# Distribution

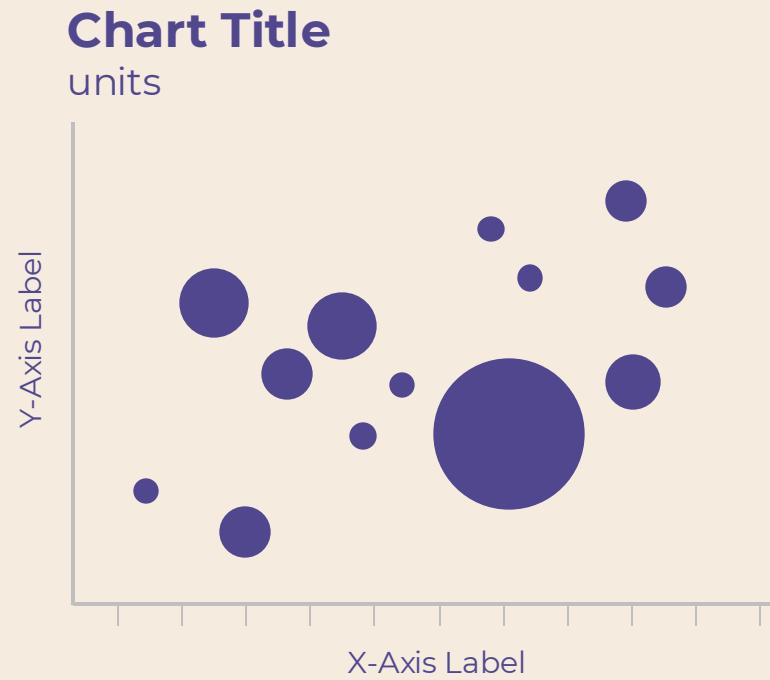
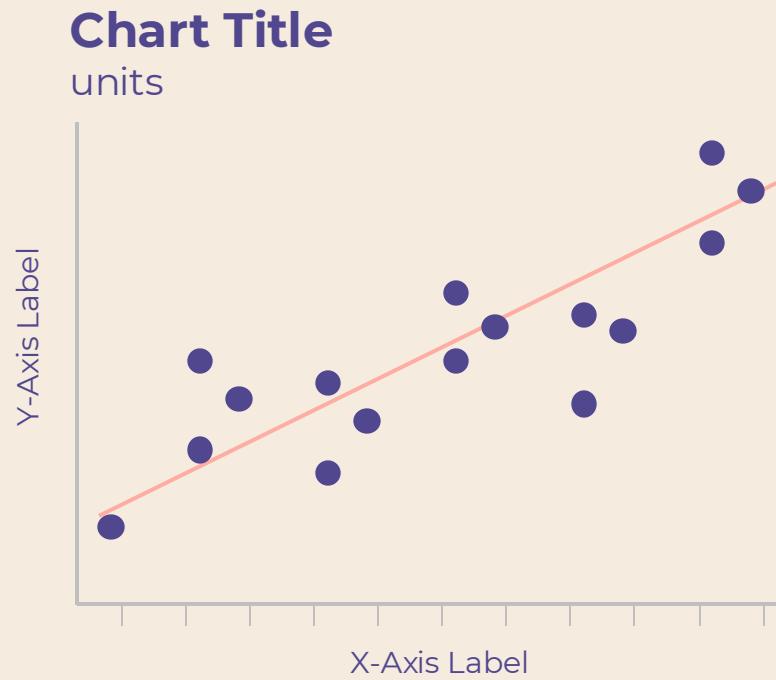
## ANALYSE



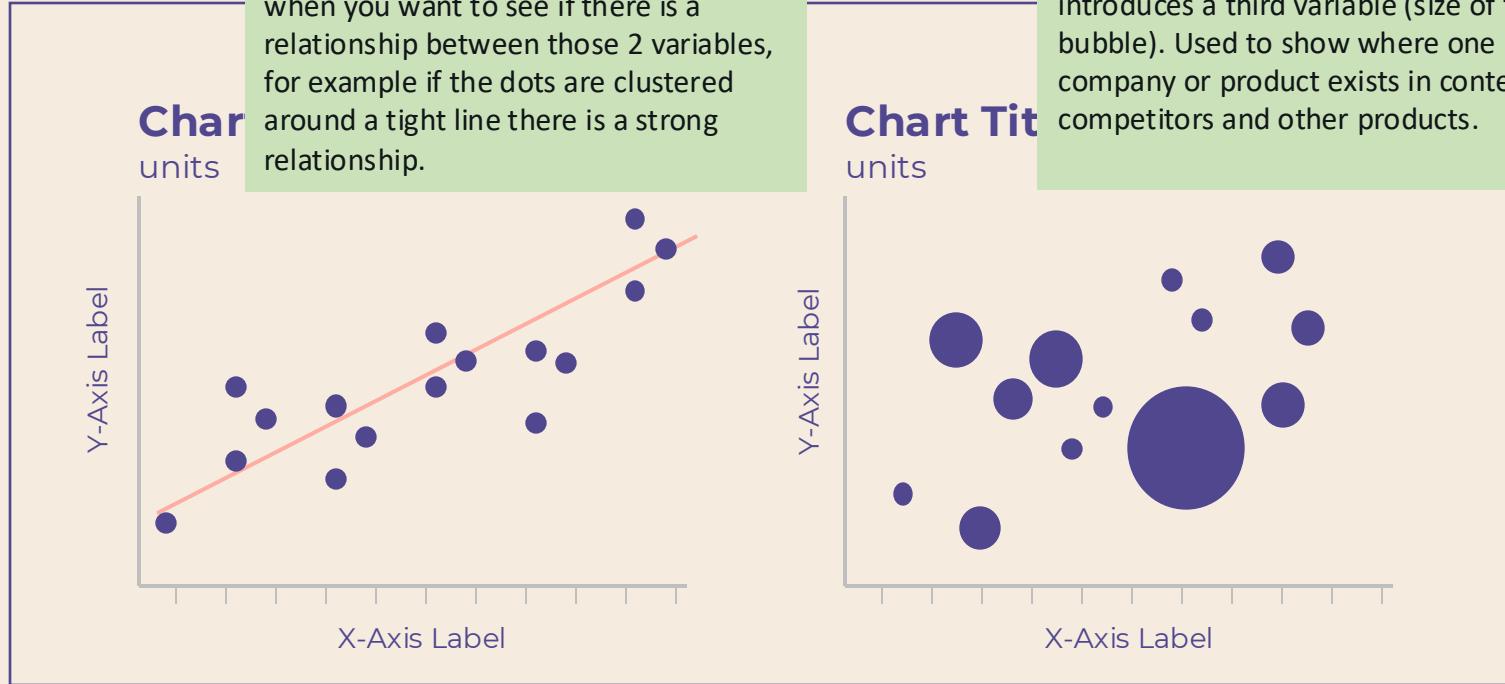
# Scatter

## ANALYSE

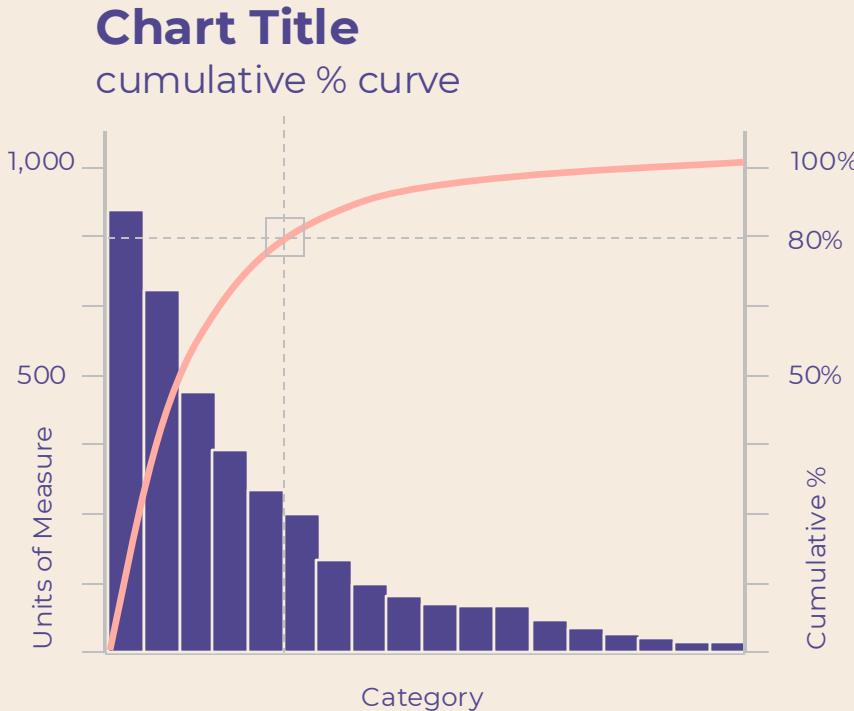
OVERNIGHT STRATEGIST  
FRAMEWORK



# Scatter ANALYSE



# Cumulative ANALYSE

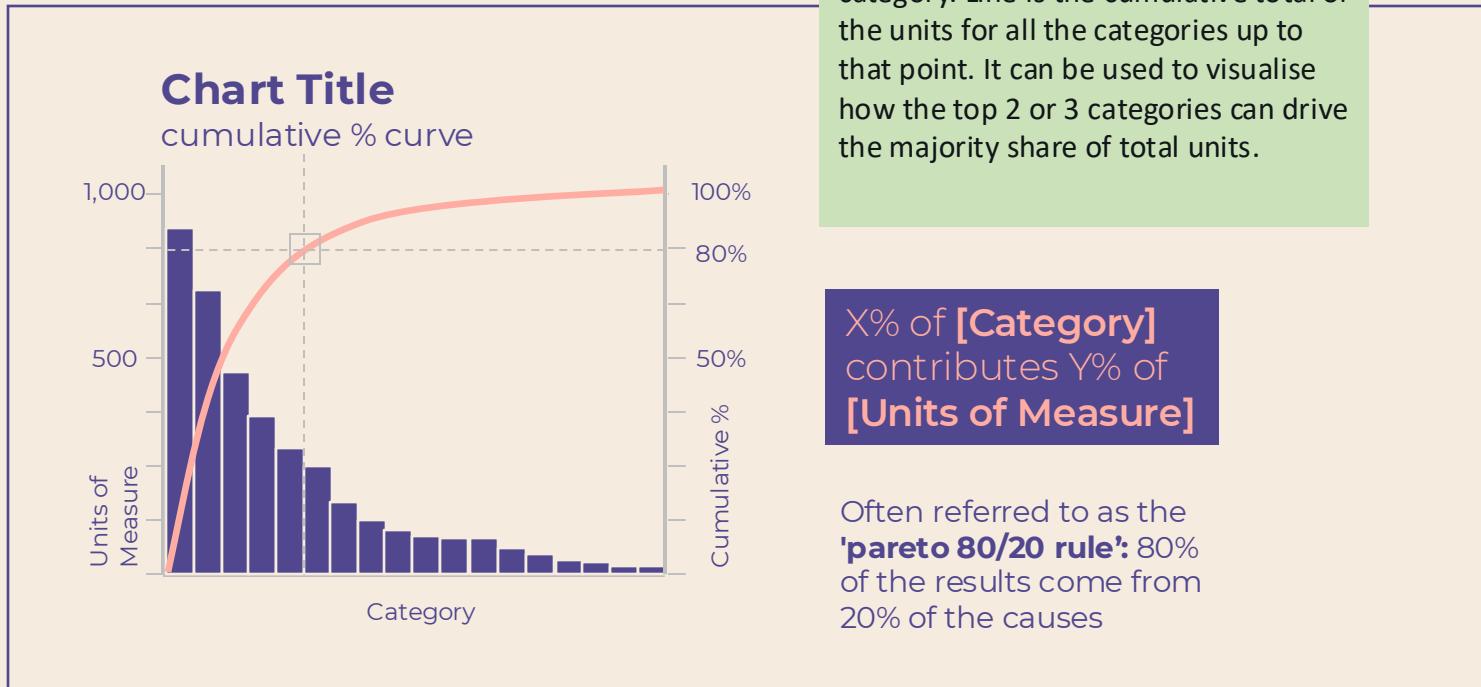


X% of **[Category]**  
contributes Y% of  
**[Units of Measure]**

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

# Cumulative

## ANALYSE



# Candlestick

## ANALYSE

Chart Title

units

Units of Measure

Full Featured

Maximum  
75<sup>th</sup> Percentile  
50<sup>th</sup> Percentile  
25<sup>th</sup> Percentile  
Minimum

Category

Chart Title

units

Units of Measure

Simplified

75<sup>th</sup> Percentile  
50<sup>th</sup> Percentile  
25<sup>th</sup> Percentile

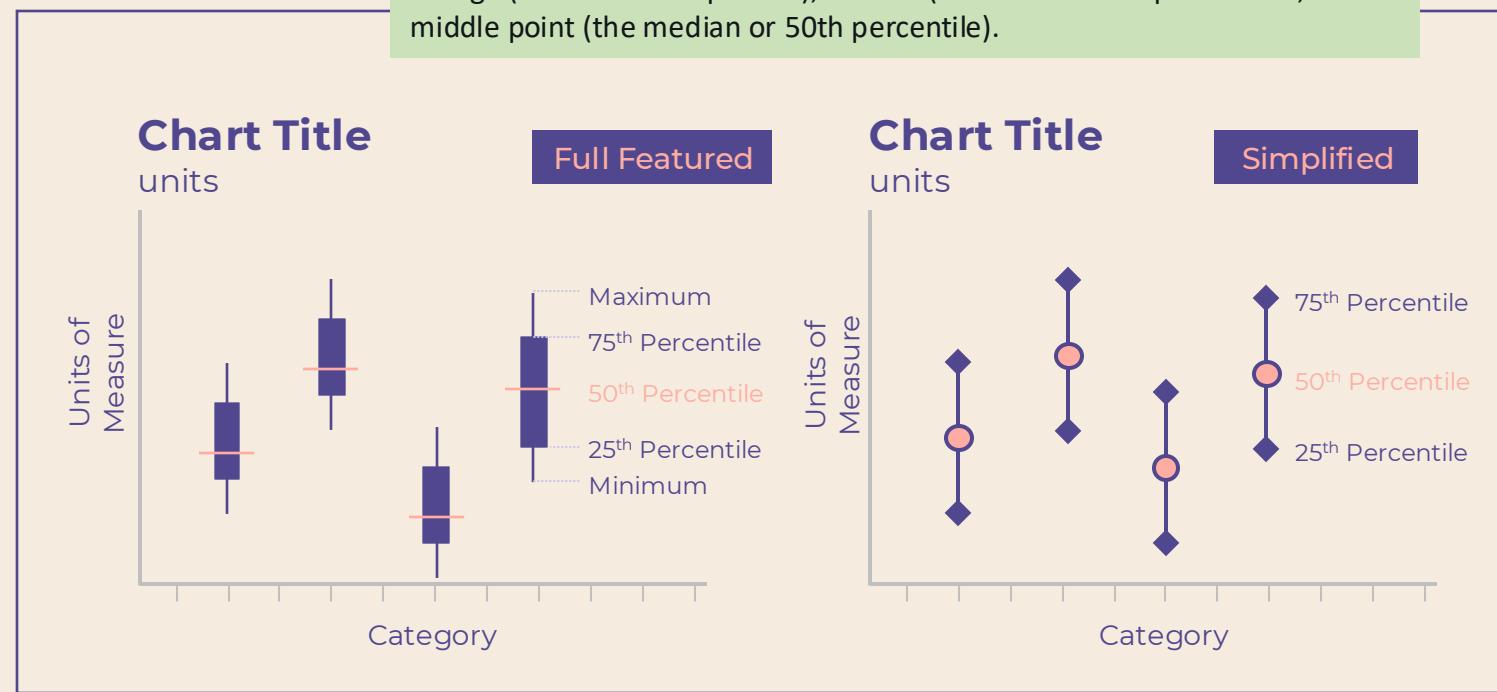
Category

# Candlestick

## ANALYSE

### Candlestick chart

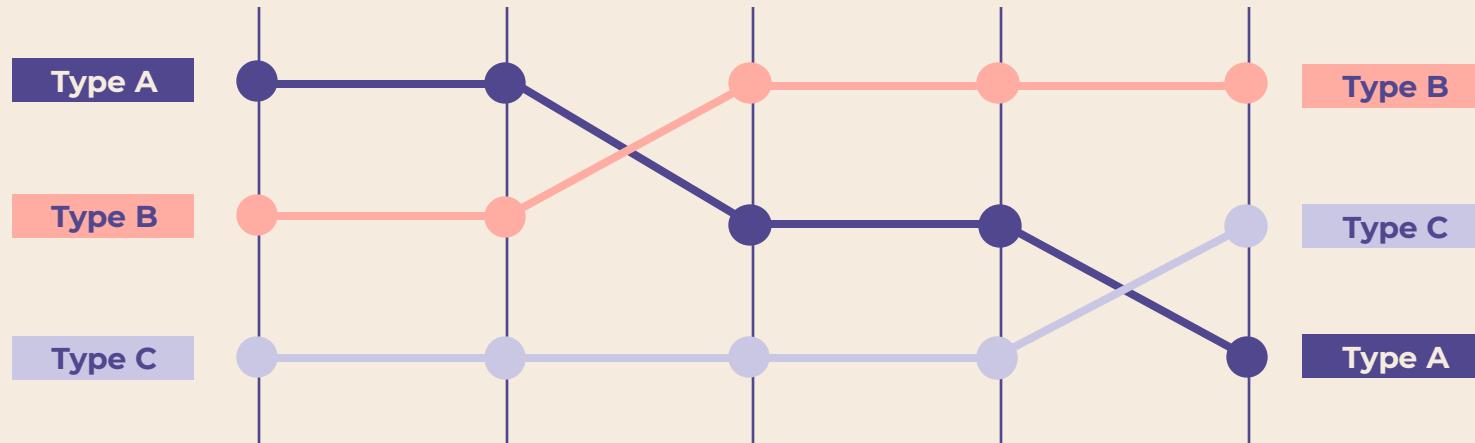
Used to display highs and lows of a category of data, typically the max low or high (bottom and top wicks), the bar (for 25<sup>th</sup> and 75<sup>th</sup> percentiles, and a middle point (the median or 50<sup>th</sup> percentile).



# Rank ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

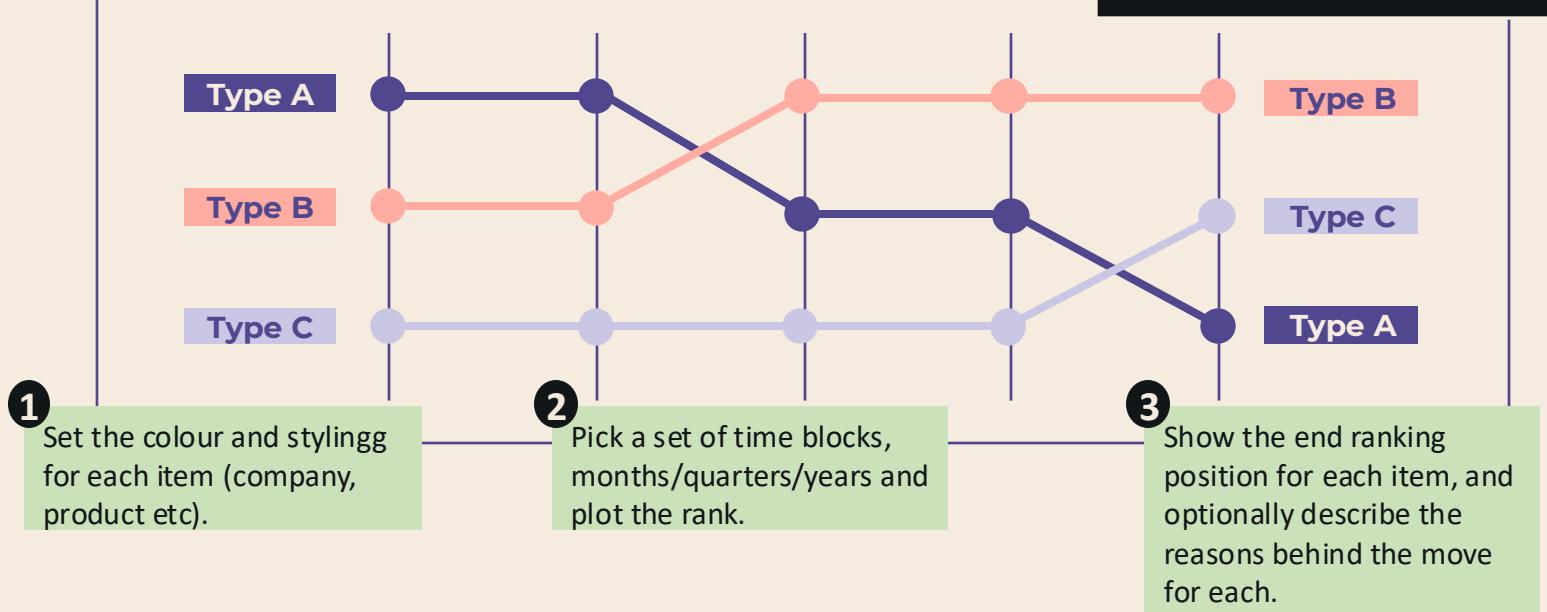


# Rank ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS

Show the rank of a product or company over time, with clear start and end points



# Unit Economics

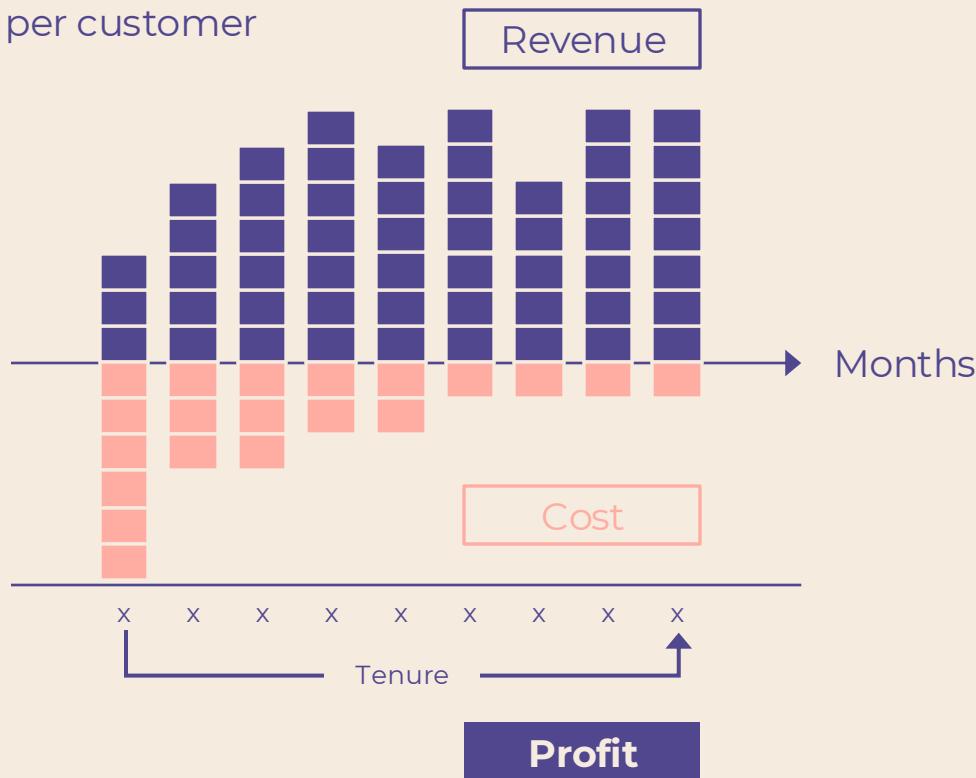
## ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

Dollars \$

per customer



**LTV**  
Lifetime Value

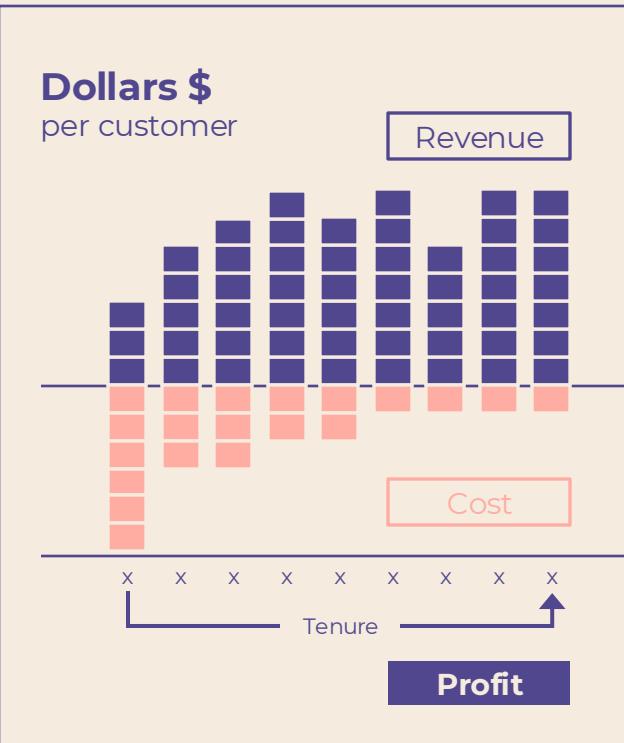
**CAC**  
Customer Acquisition Cost

**LTV:CAC**  
Ratio

**CAC Payback**  
Period

# Unit Economics

## ANALYSE



'Unit Economics' examines the ongoing profit (revenues less cost) over life of the customer vs. the cost to acquire that customer.

1 Sum of monthly profit per customer over the tenure of the customer

LTV  
Lifetime Value

2 Upfront cost to acquire customer

CAC  
Customer Acquisition Cost

3 Ratio of customer life value to customer acquisition cost

LTV:CAC  
Ratio

4 Time it takes to fully cover customer acquisition costs

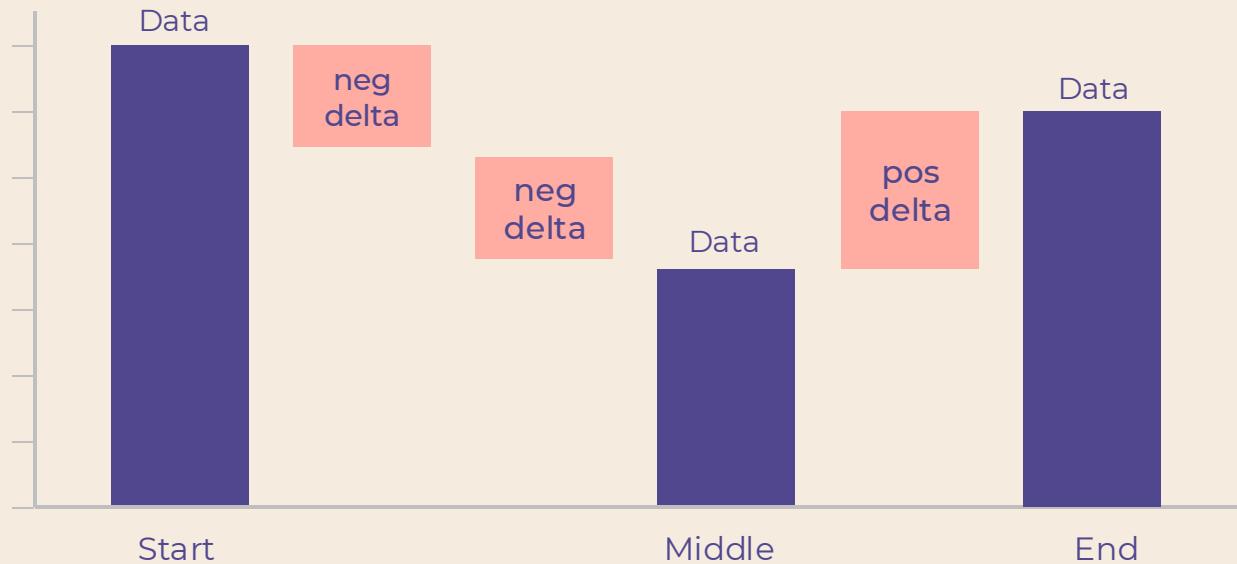
CAC Payback Period

# Waterfall

## ANALYSE

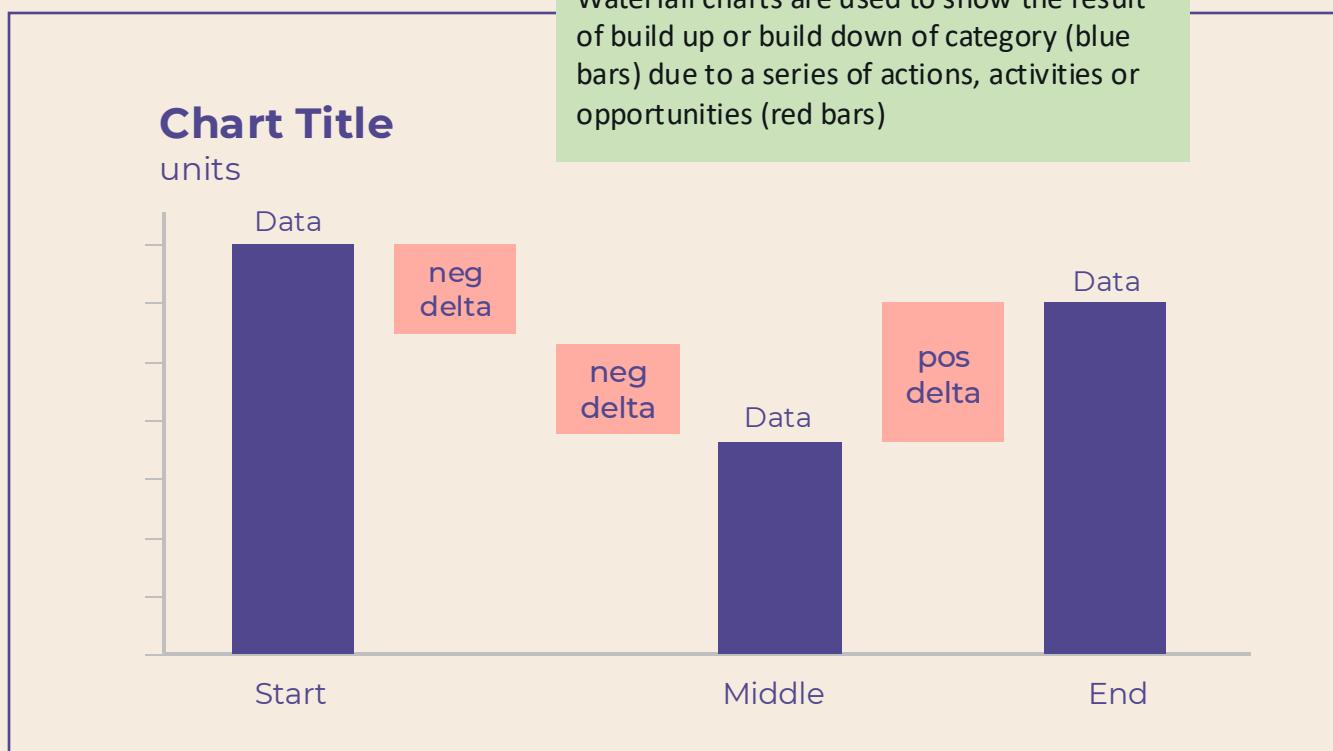
**Chart Title**

units



# Waterfall

## ANALYSE

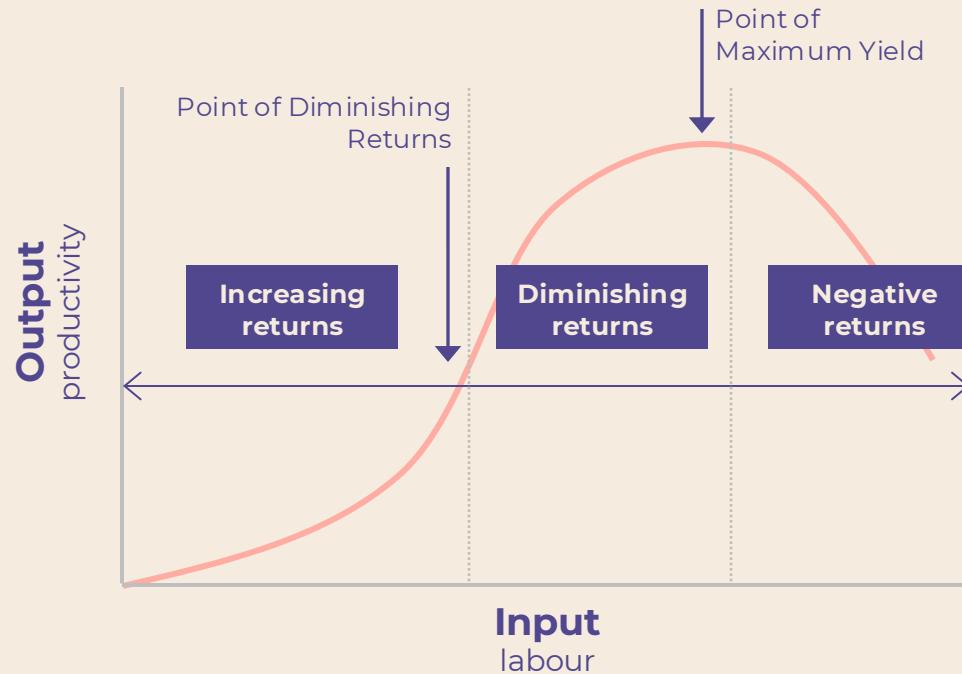


# Marginal Return

## ANALYSE

### Law of diminishing returns

input vs. output

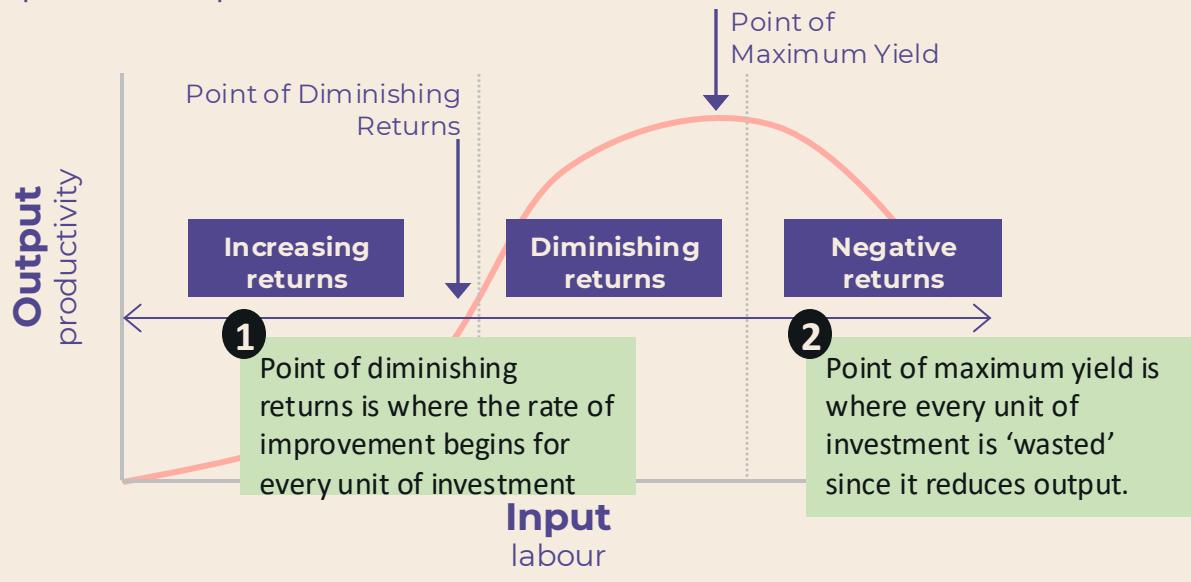


# Marginal Return

## ANALYSE

'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

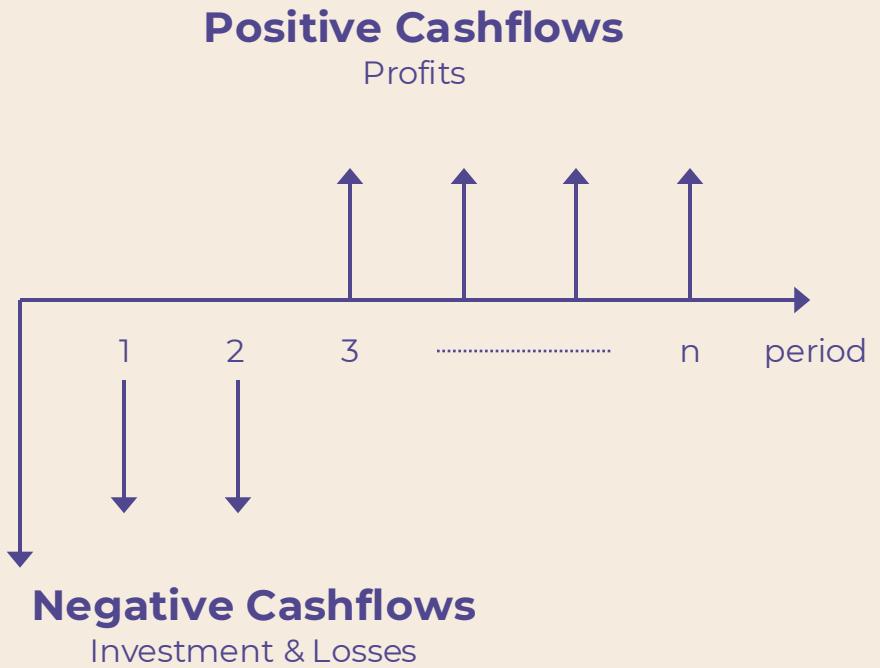


# Cashflow

## ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

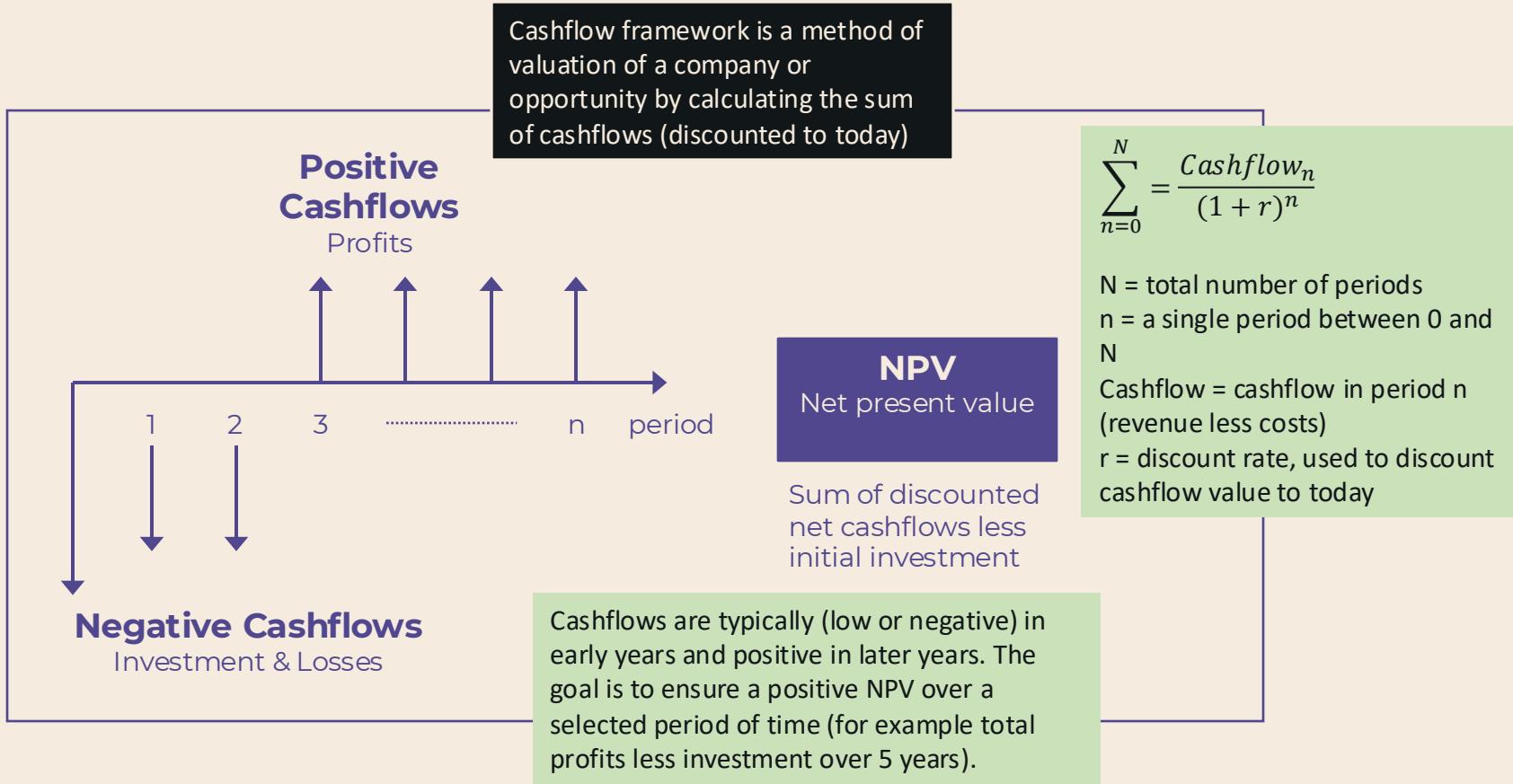


**NPV**  
Net present value

Sum of discounted  
net cashflows less  
initial investment

# Cashflow

## ANALYSE

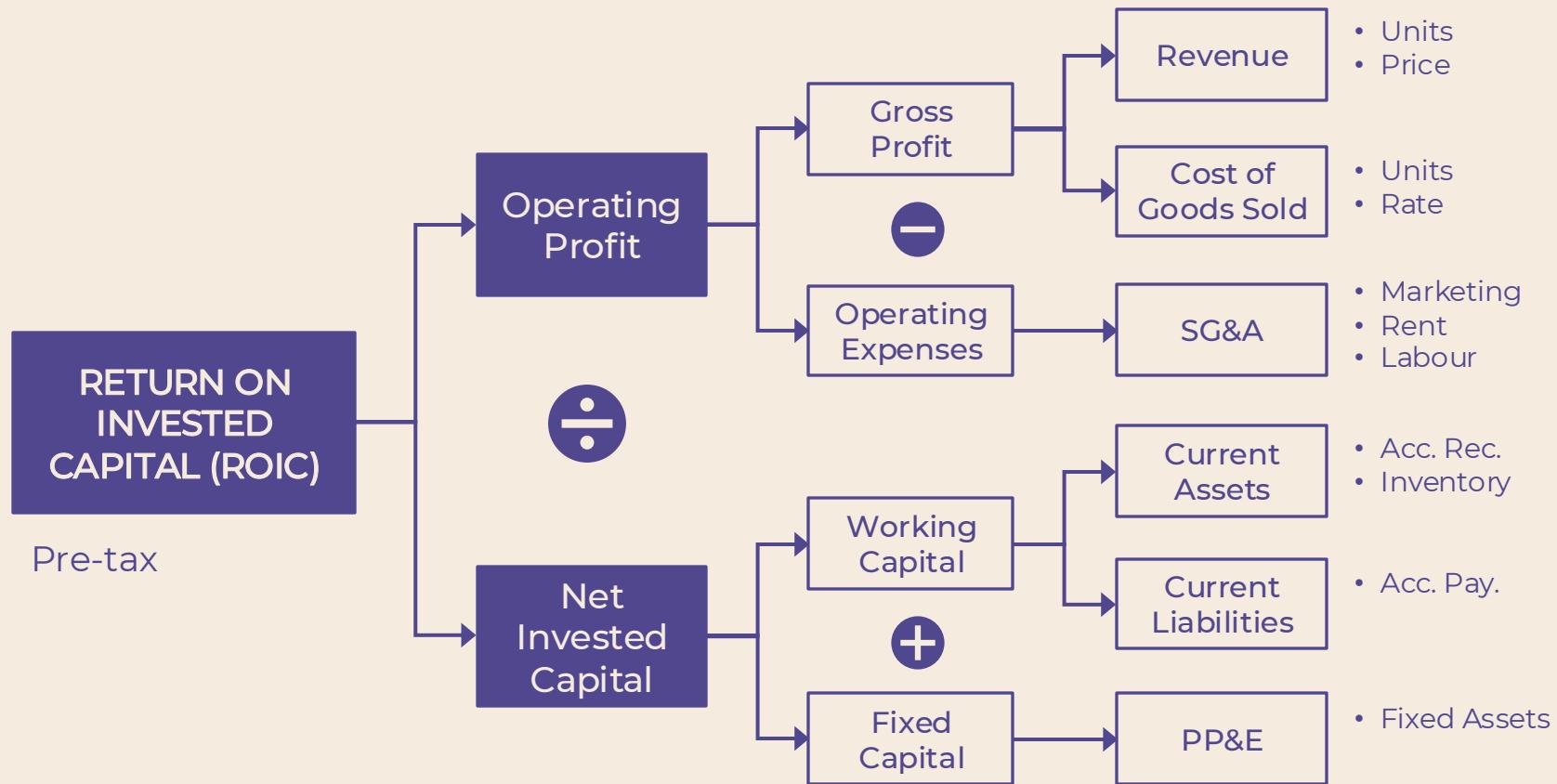


# ROIC

## 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.

Operating profit tracks the drivers of net sales and ongoing expenses.

RETURN ON  
INVESTED CAPITAL  
(ROIC)

Pre-tax

Invested capital is the sum of short term liquid 'working capital' and larger asset investment 'fixed capital'

Operating Profit



Net  
Invested  
Capital

Gross Profit



Operating Expenses

Revenue

Cost of Goods Sold

SG&A

- Units
- Price

- Units
- Rate

- Marketing
- Rent
- Labour

- Acc. Rec.
- Inventory

- Acc. Pay.

- Fixed Assets

Working Capital



Fixed Capital

Current Assets

Current Liabilities

PP&E

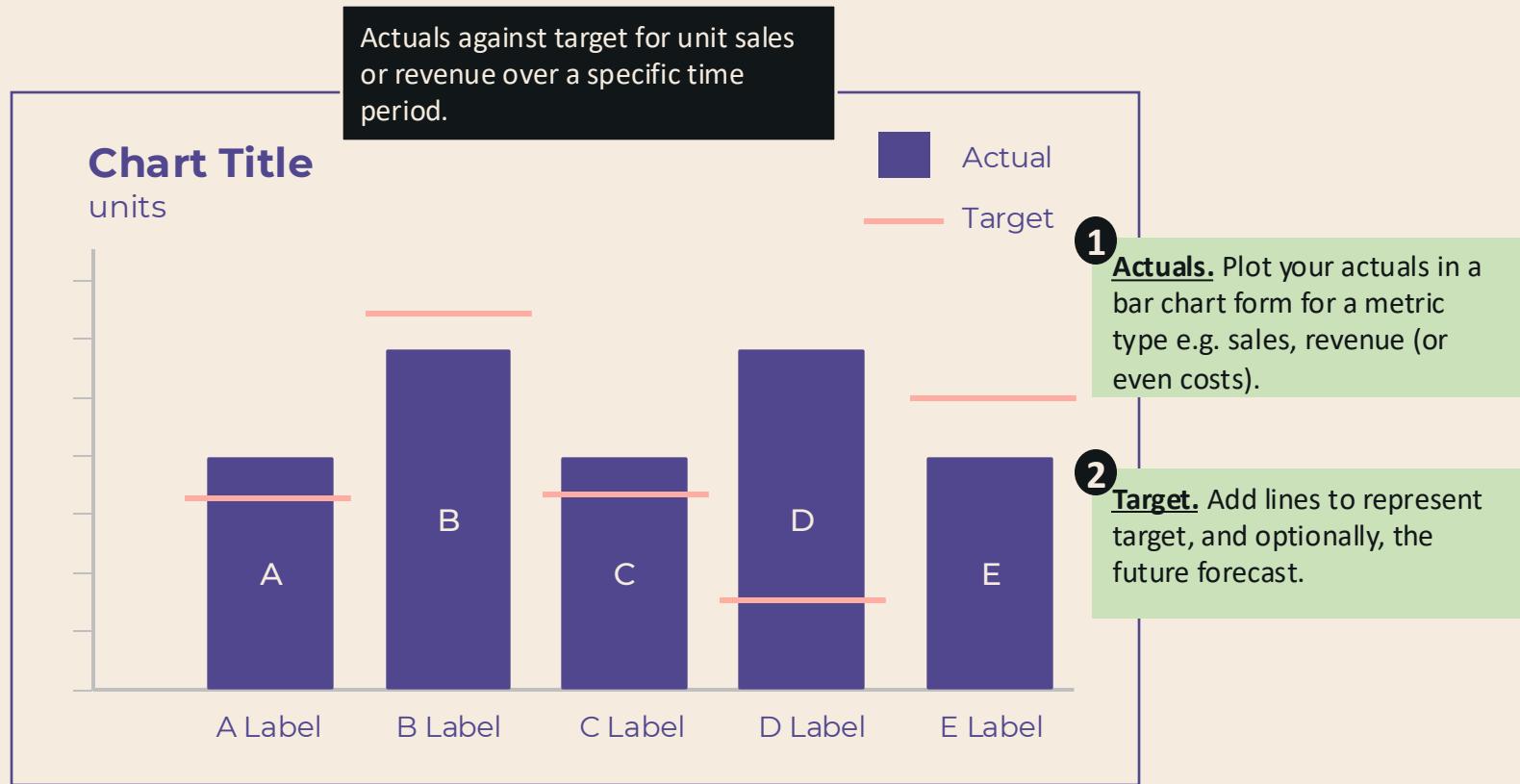
# Actual v Target

## ANALYSE



# Actual v Target

## ANALYSE



# Profit Margin

## ANALYSE

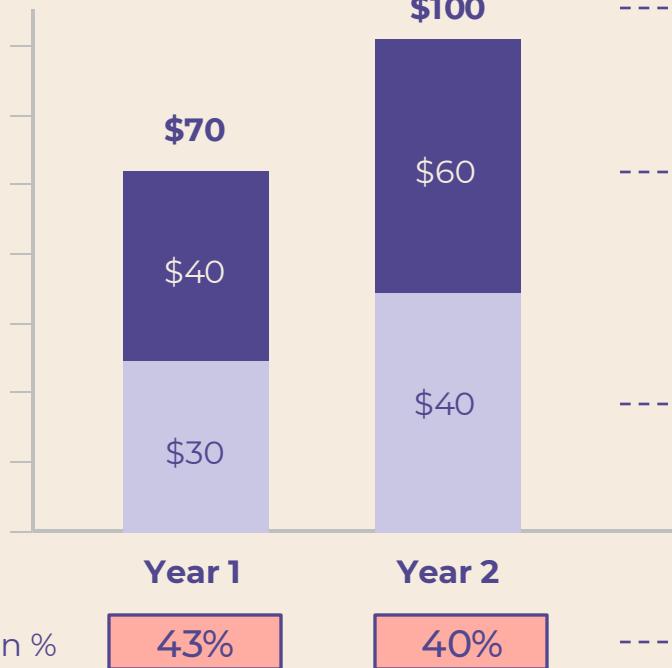
FRAMEWORK

+

INSTRUCTIONS

### Revenue & Profit

\$, millions

**Revenue**

Total bar represents the top-line sales revenue

**Cost**

Dark purple bar represents the direct variable and indirect fixed costs

**Profit Margin**

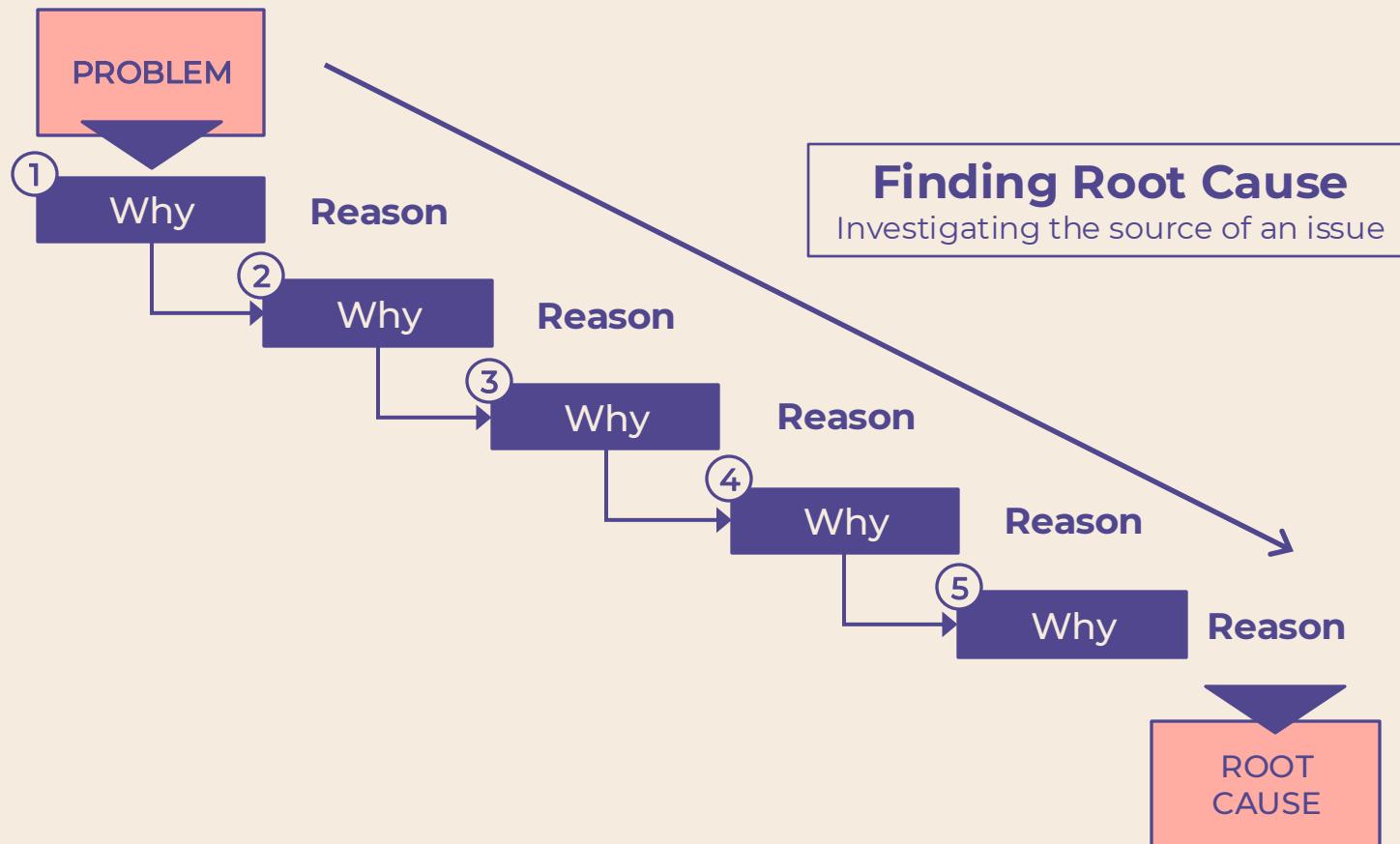
Light shaded purple bar represents remainder profit (revenue less costs)

**Profit Margin %**

Red shaded box is the profit margin % (profit divided by revenue)

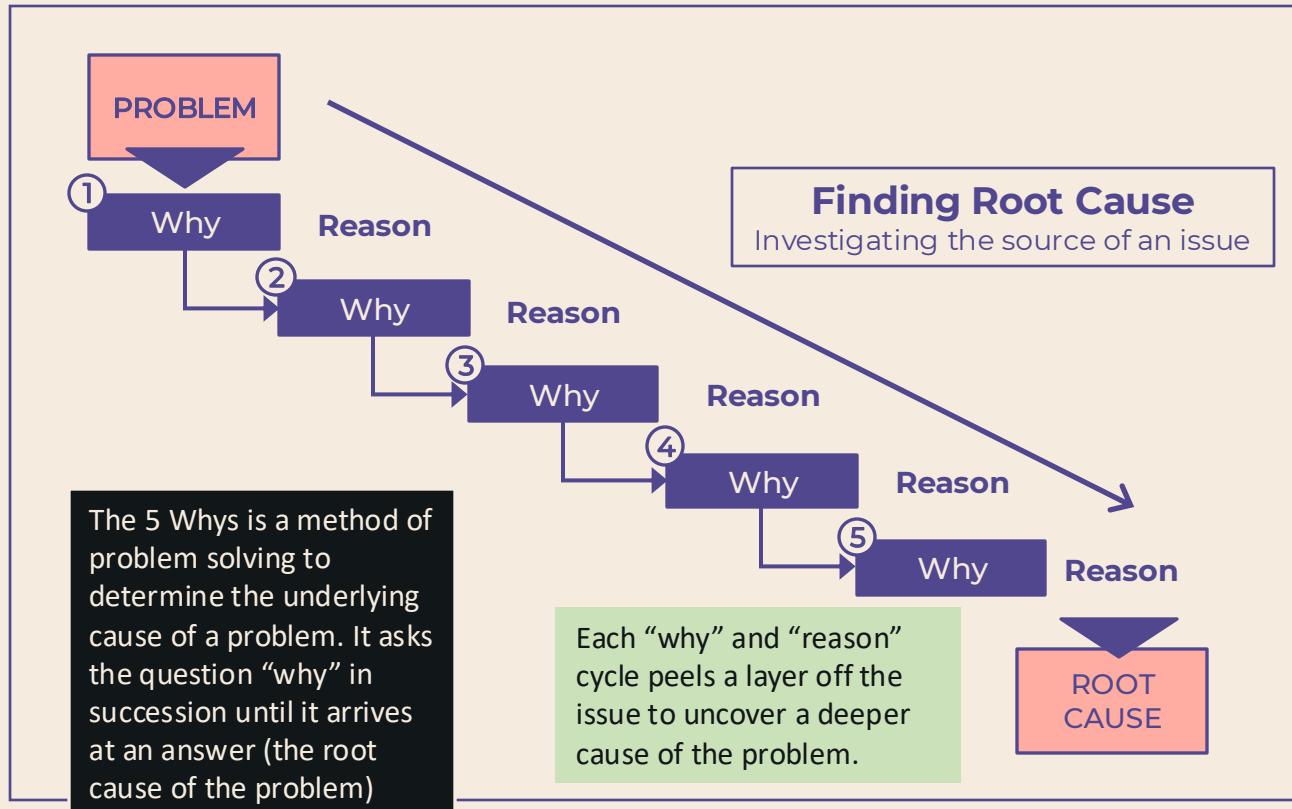
# 5 Why's

## ANALYSE



# 5 Why's

## ANALYSE

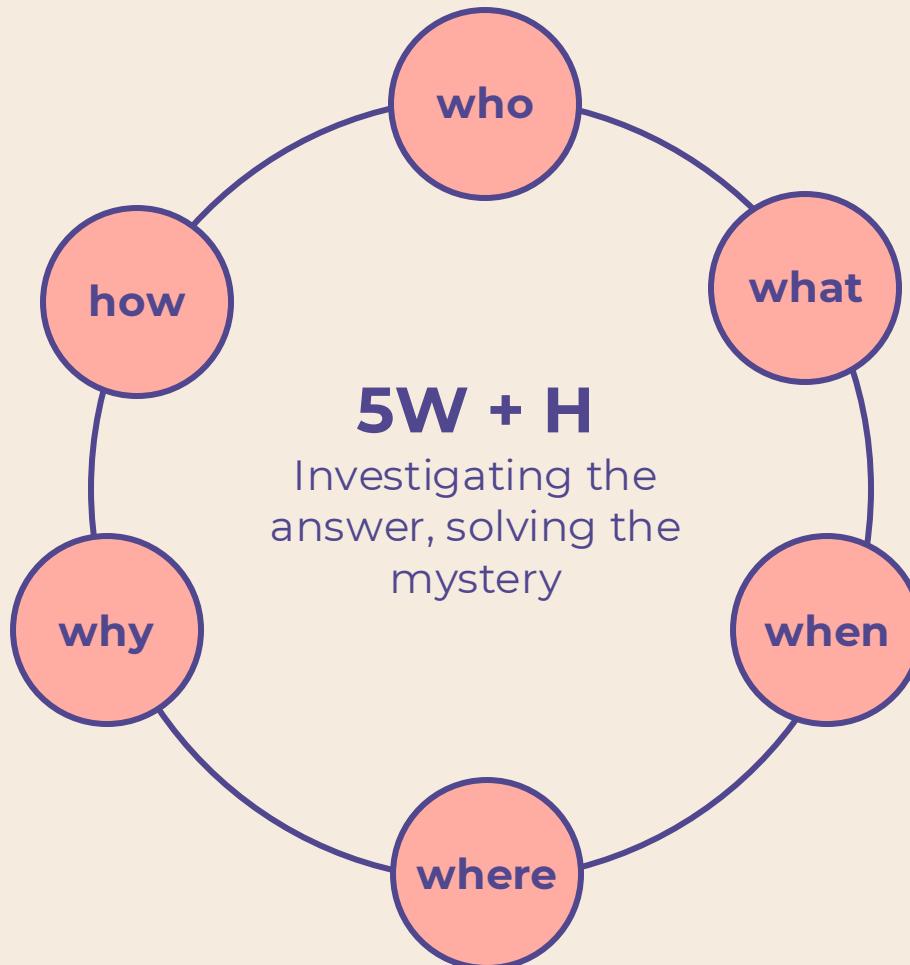


# 5W + H

## ANALYSE

OVERNIGHT STRATEGIST

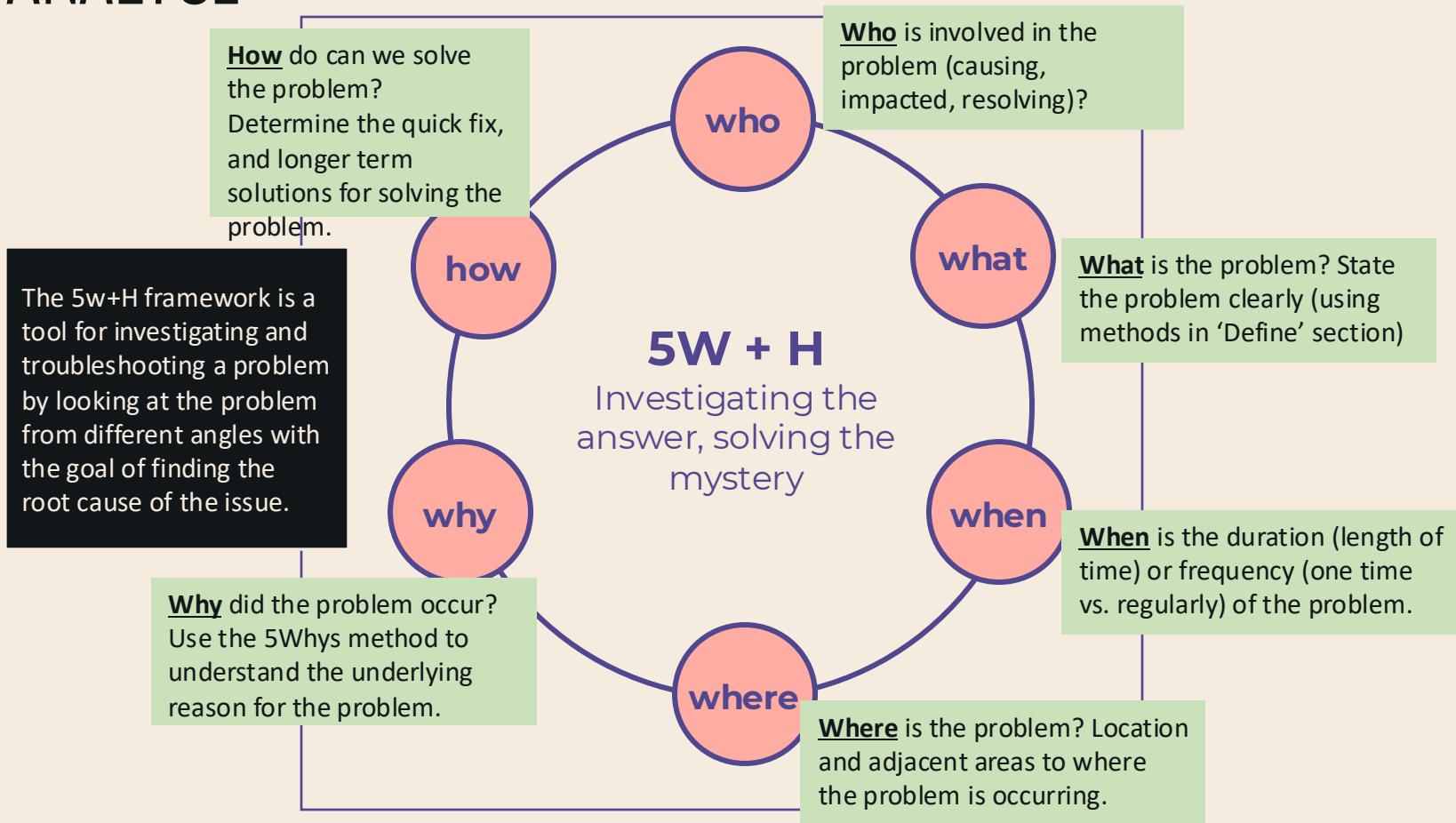
FRAMEWORK



# 5W + H

## ANALYSE

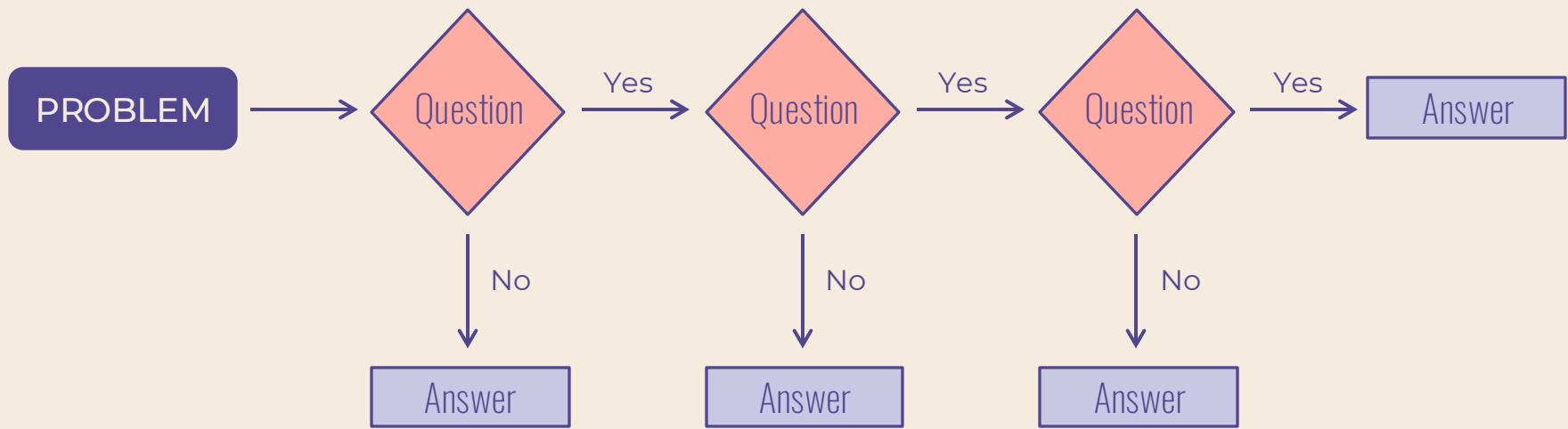
INSTRUCTIONS



# Yes/No

## ANALYSE

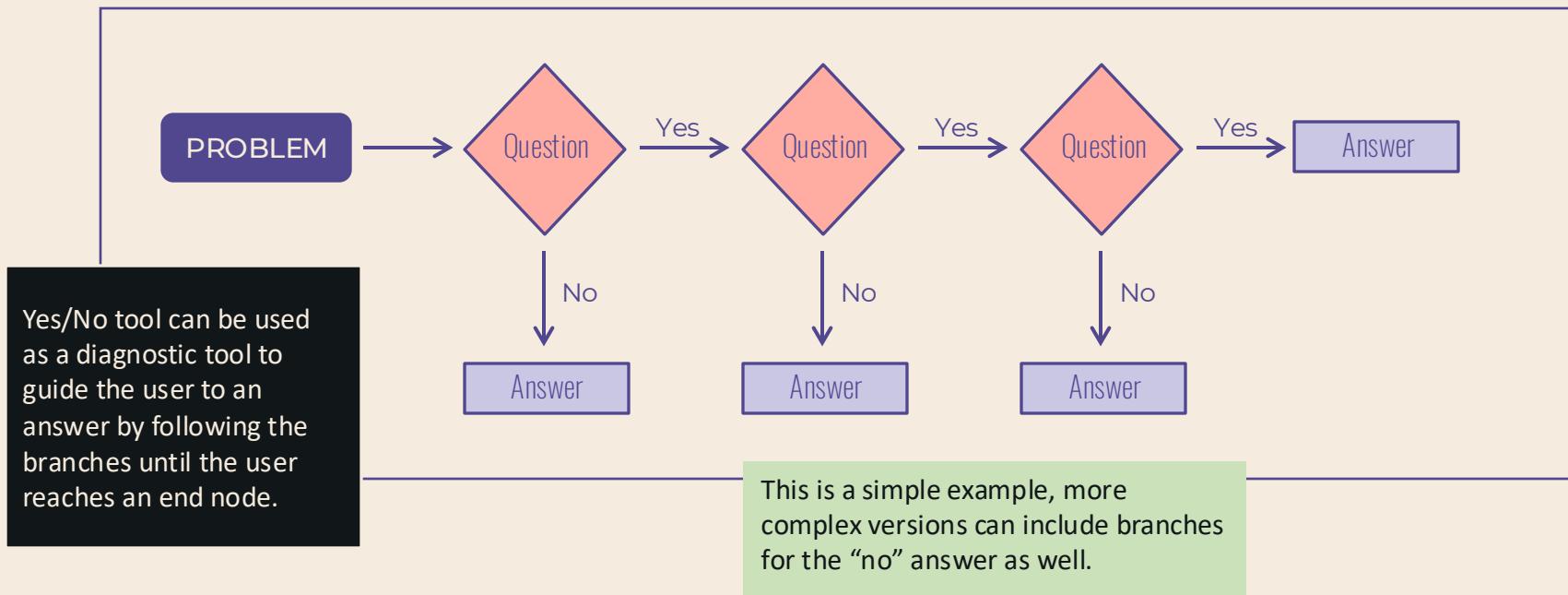
### Yes/No Flowchart



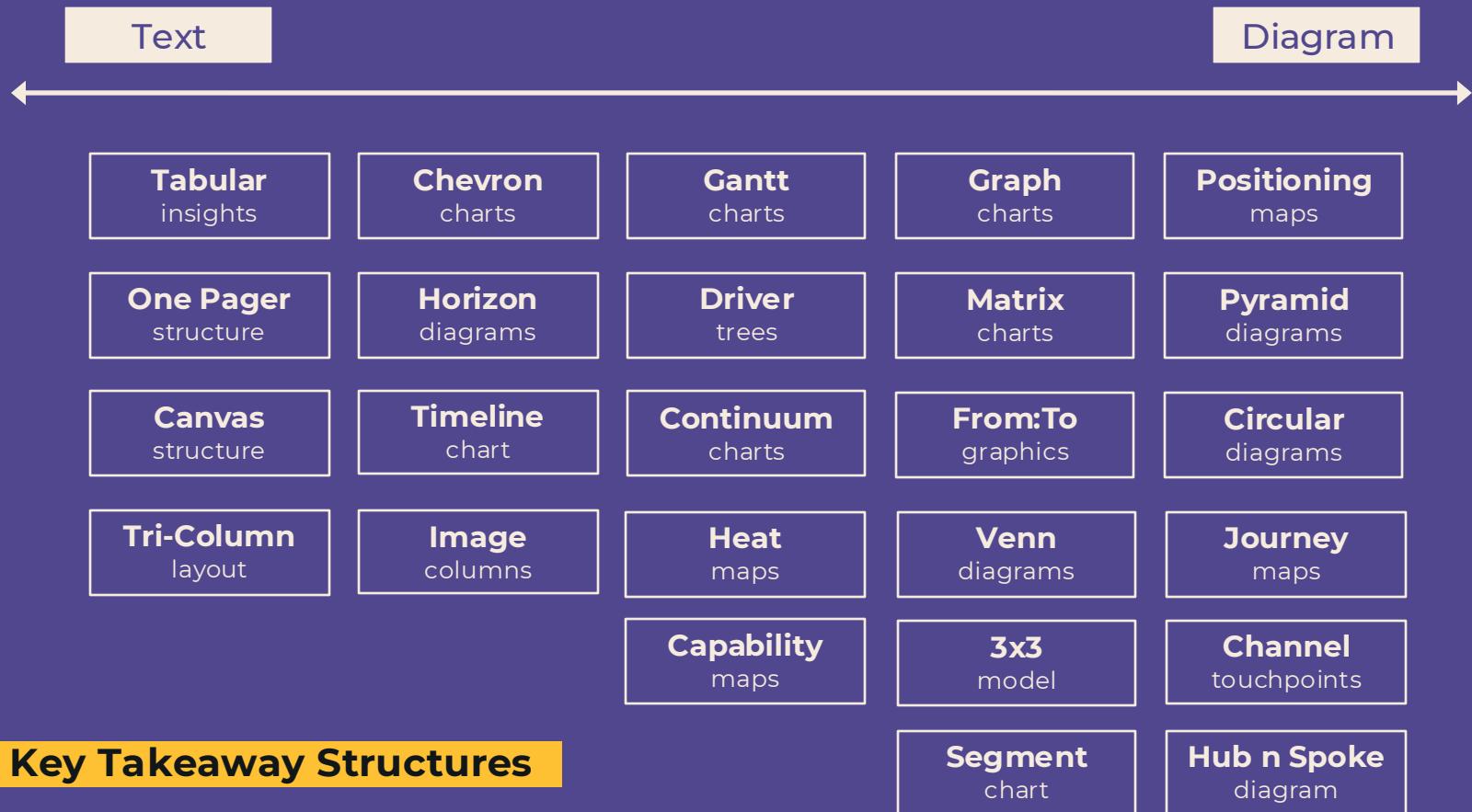
# Yes/No

## ANALYSE

### Yes/No Flowchart



# Insight



# Tabular INSIGHT

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

# Tabular INSIGHT

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.

Category	Sub-category
	Sub-category
	Sub-category

Category

Sub-category
Sub-category
Sub-category

Sub-category
Sub-category
Sub-category

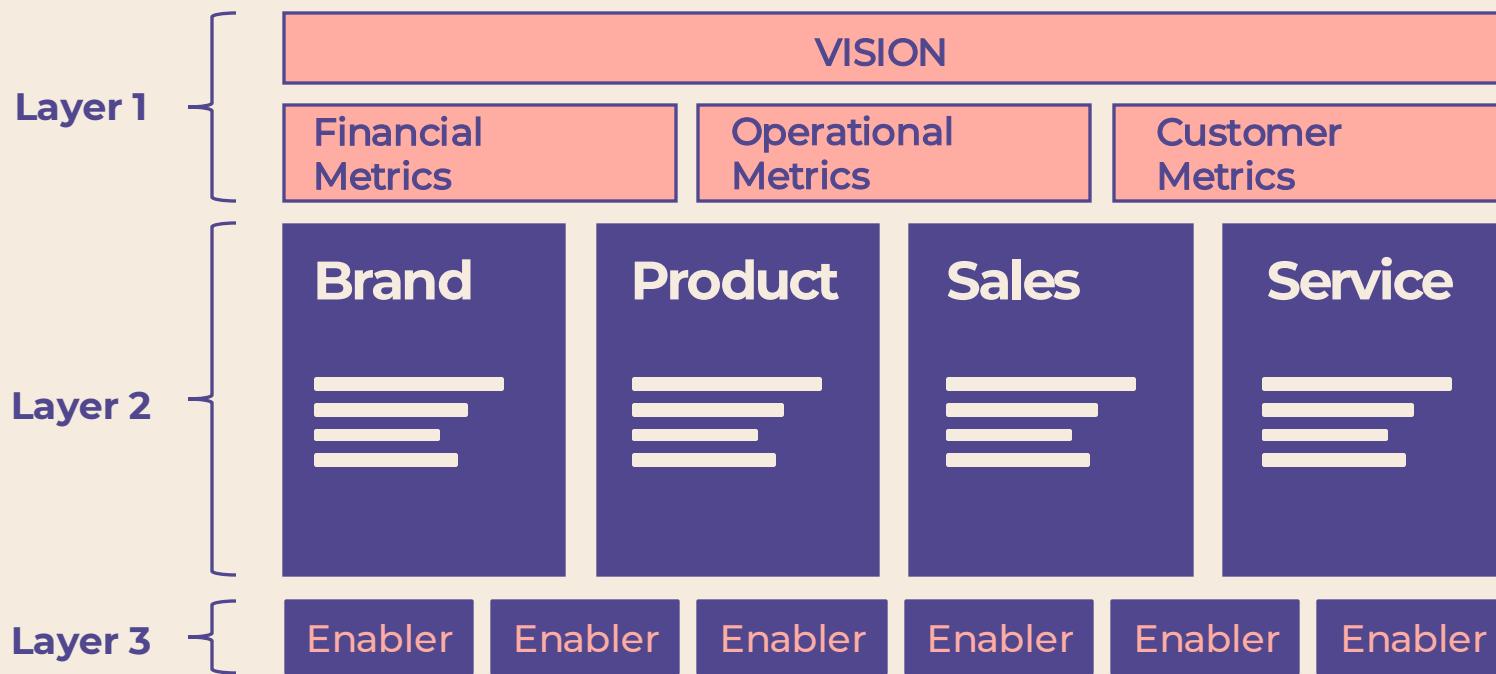
The table or grid format is the bread butter type page for insights. You can usually default to a similar style if you need to structure your takeaways

Description	Impact	Takeaway
Description	HIGH	<ul style="list-style-type: none"><li>Comment</li></ul>
...	MED	<ul style="list-style-type: none"><li>...</li></ul>
...	LOW	<ul style="list-style-type: none"><li>...</li></ul>
Description	HIGH	<ul style="list-style-type: none"><li>Comment</li></ul>
...	MED	<ul style="list-style-type: none"><li>...</li></ul>
...	LOW	<ul style="list-style-type: none"><li>...</li></ul>

# One Pager

## INSIGHT

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



# One Pager

## INSIGHT

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

1

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

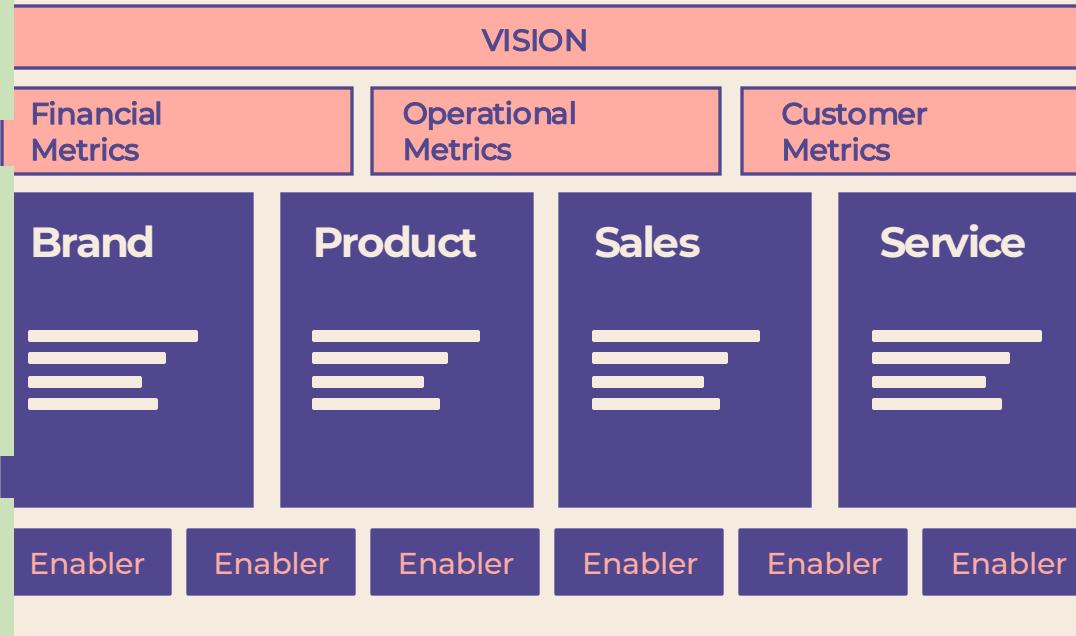
2

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.

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.



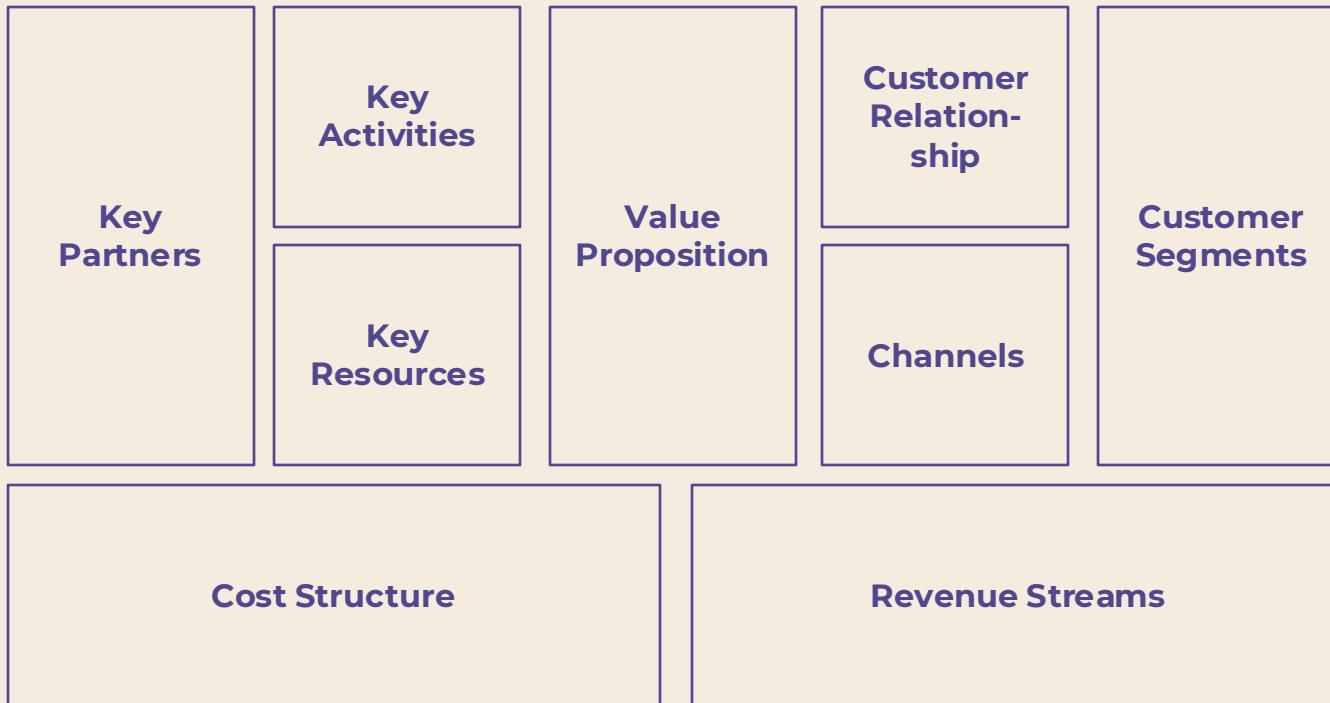
# Canvas

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### 'Business Model Canvas' Example



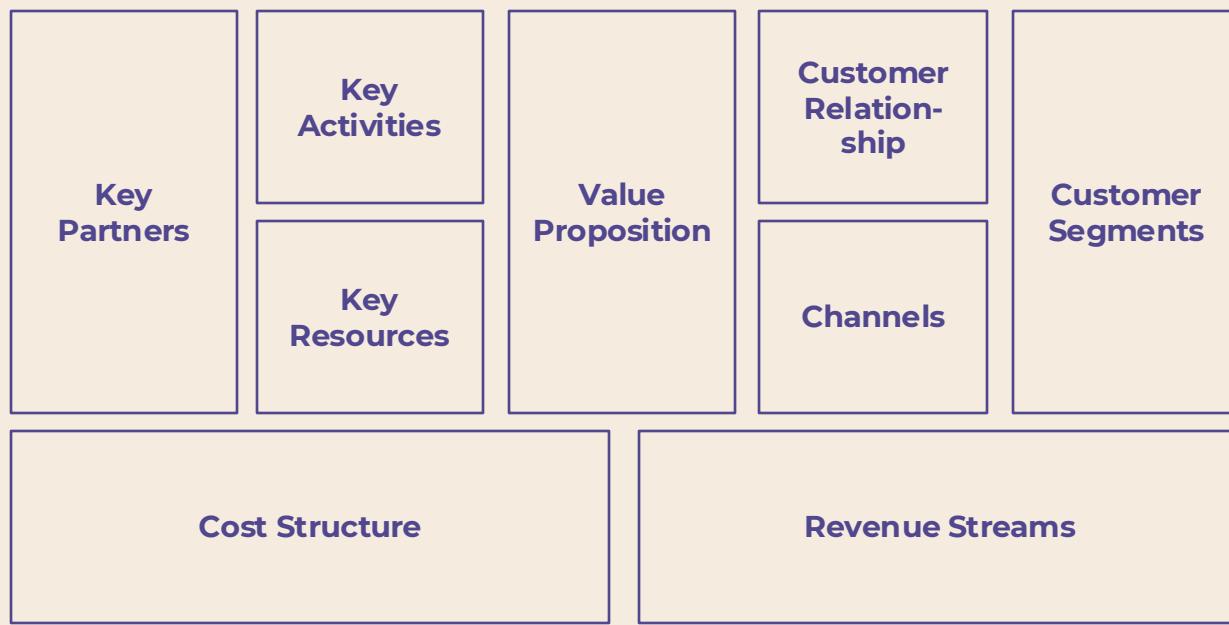
Ref. *Business Model Generation*, A. Osterwalder and Y.Pigneur

# Canvas

## INSIGHT

### '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.



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.

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

# Tri-Column

## INSIGHT

### 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

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
- ...
- ...

### ...Sub-Headline 2

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

### ...Sub-Headline 3

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

Outcome

Outcome

Outcome

1

1

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.

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

**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

Phase 1

Phase 2

Phase 3

Phase 4

Phase 5

- 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
- ...

# Chevron

## INSIGHT

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~~ steps in this phase

- Description of **steps** in this phase

...

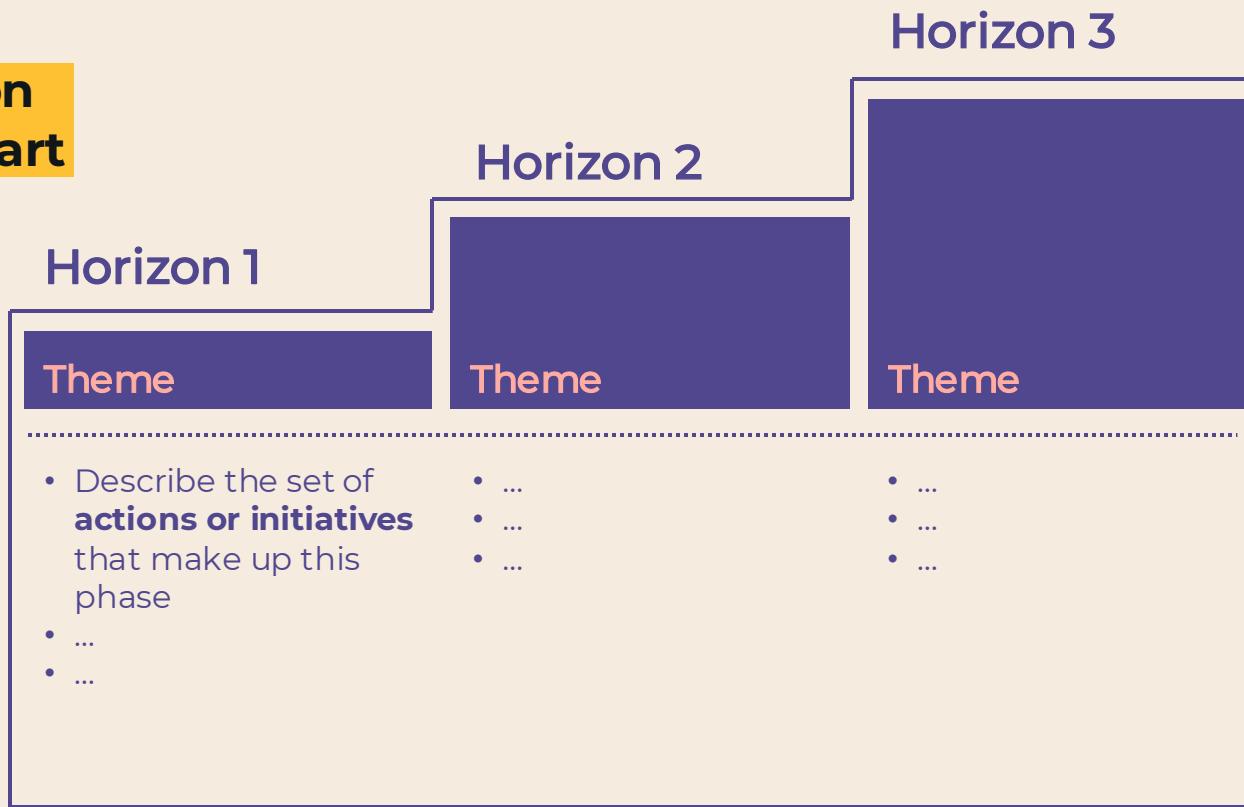
# Horizon

## INSIGHT

OVERNIGHT STRATEGIST

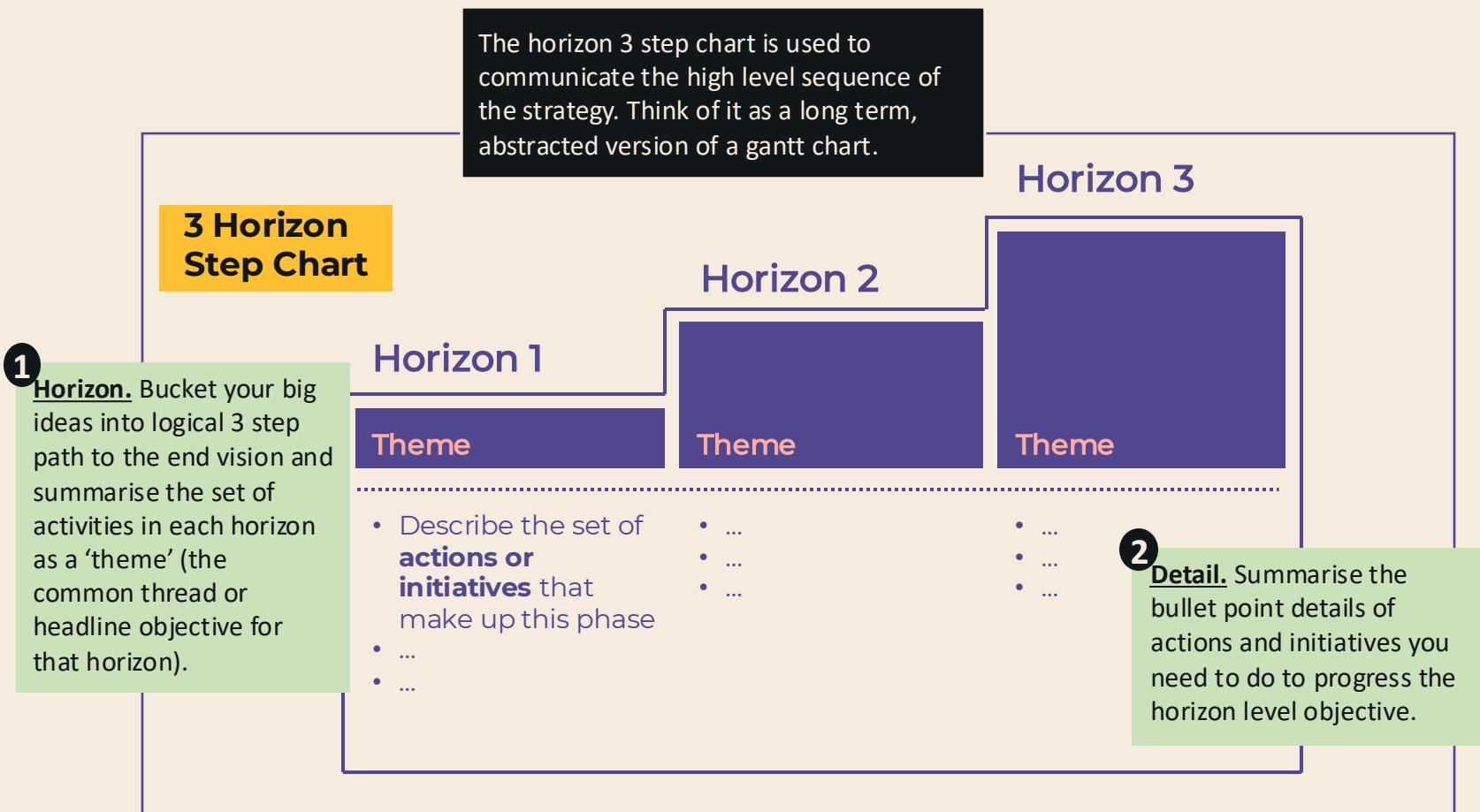
FRAMEWORK

### 3 Horizon Step Chart



# Horizon

## INSIGHT

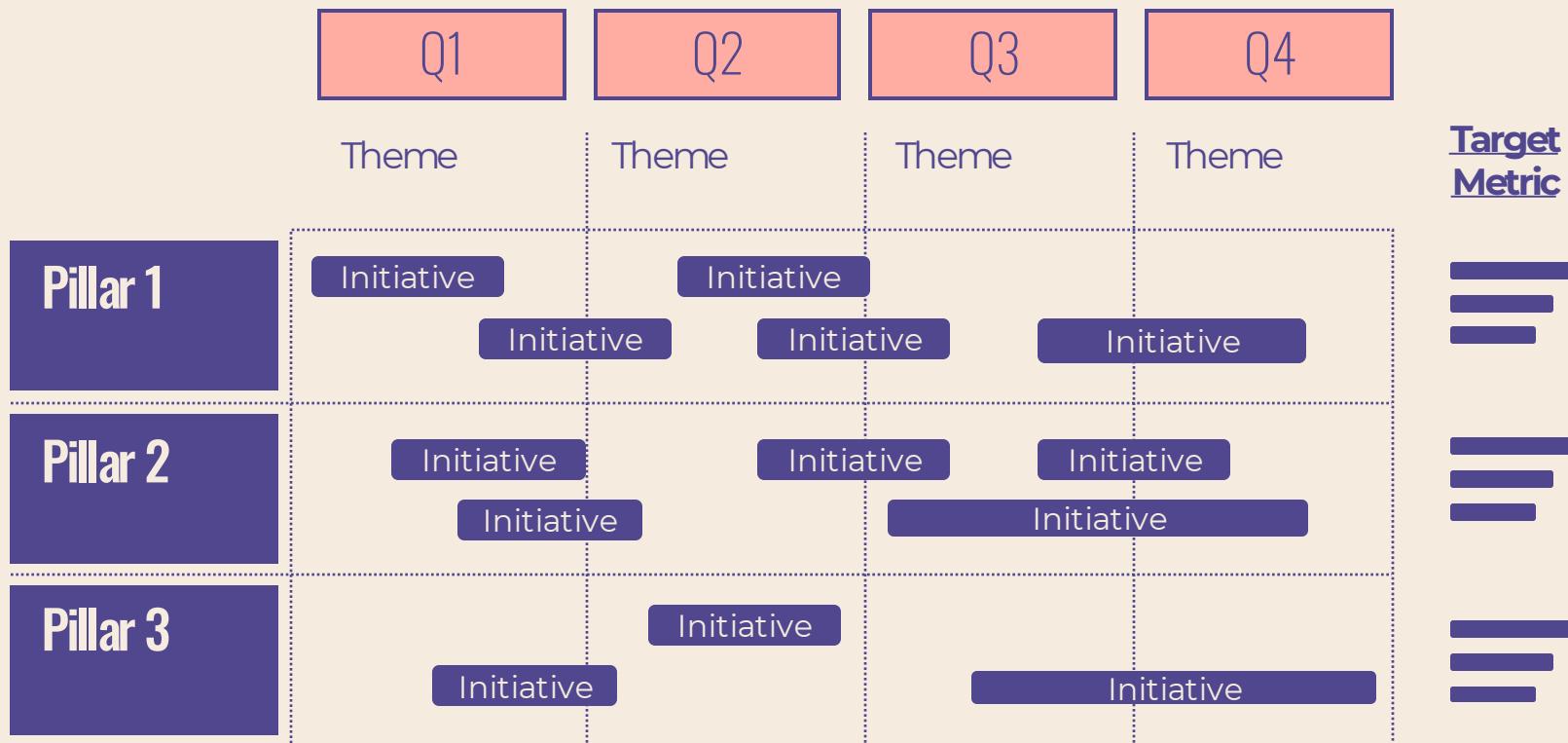


# Gantt

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK



# Gantt

## INSIGHT

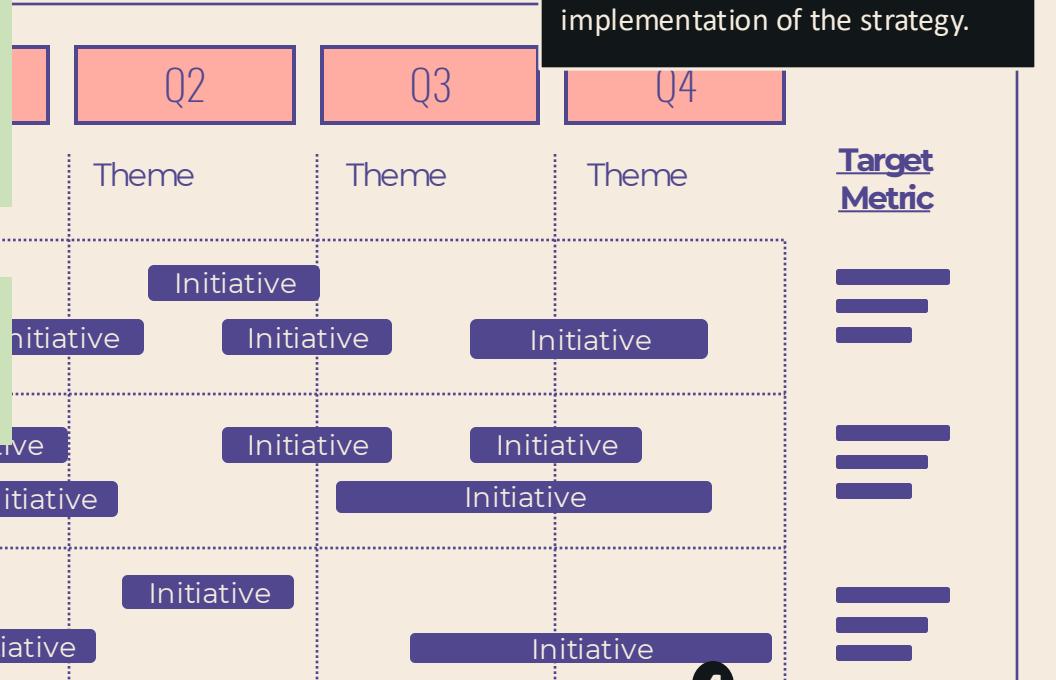
### INSTRUCTIONS

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

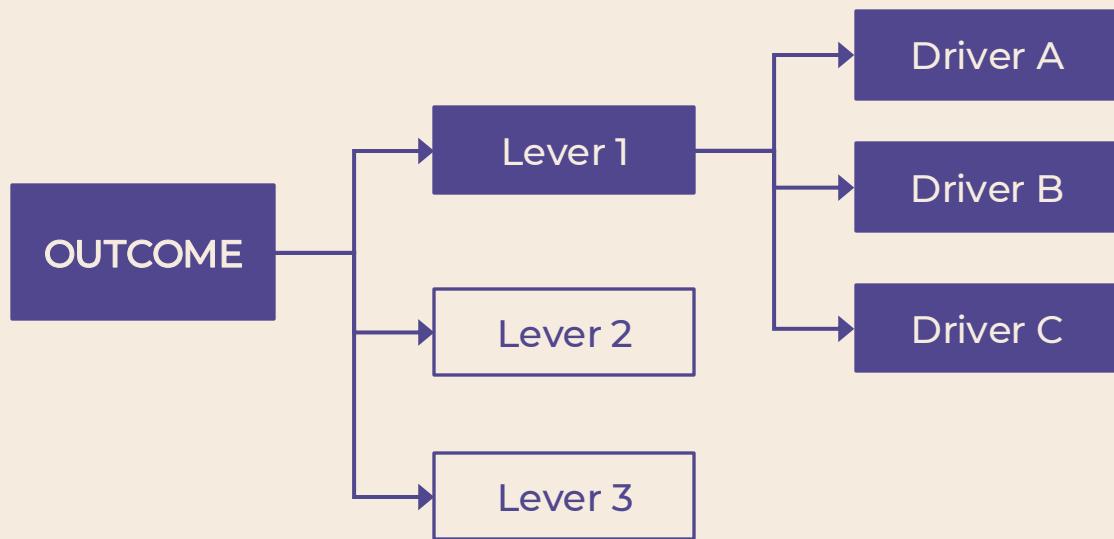
**Initiatives:** The projects or set of activities required that deliver on the strategic pillar.

4

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

# Driver Tree

## INSIGHT



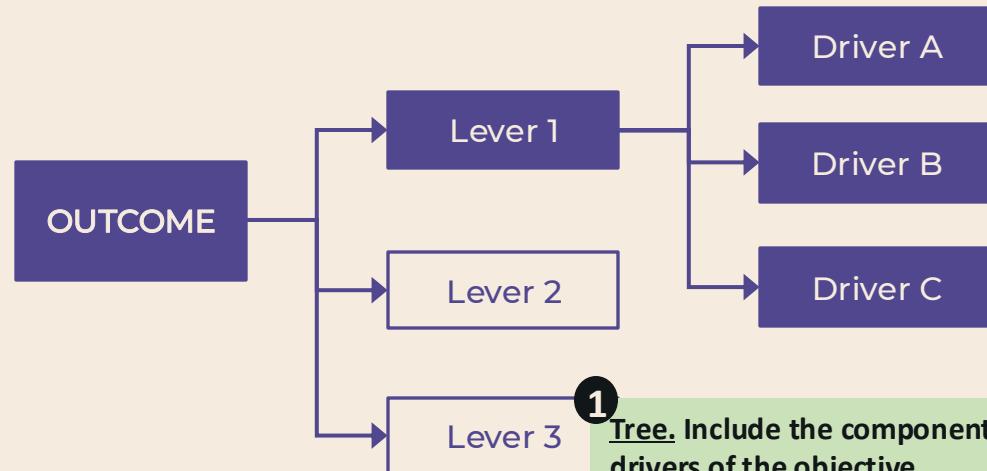
### Comment

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

# Driver Tree

## INSIGHT

Driver tree layout is one of the most effective ways to visualise the levers of an objective and the actions you will take to drive change.



### Comment

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

1

**Tree.** Include the component drivers of the objective. Make sure they don't overlap and are distinctly different.

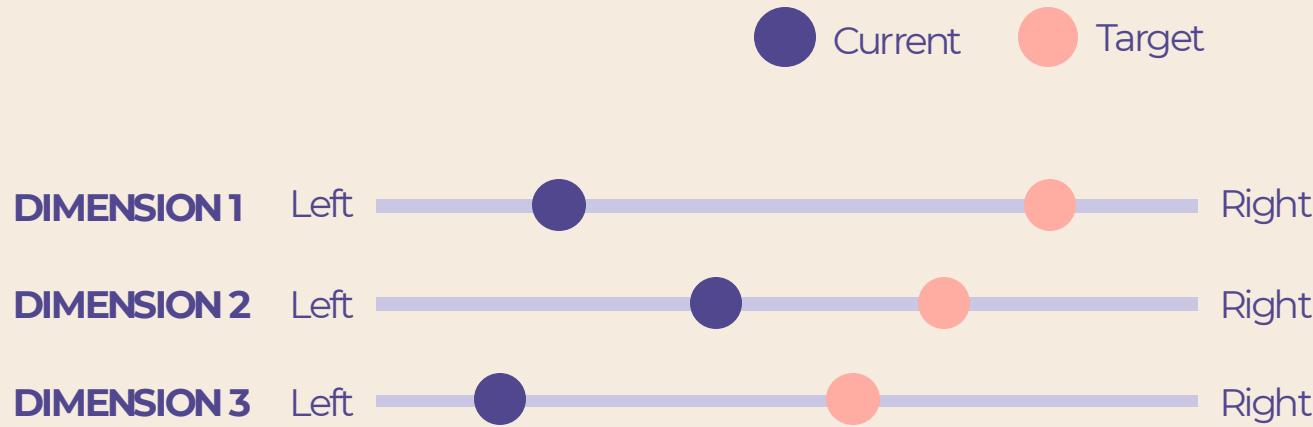
2

**Comment.** Describe the impact or rationale for each branch or twig of the driver tree. The branches/twigs add up to deliver on the headline outcome.

# Continuum

## INSIGHT

### Continuum Sliders



# Continuum

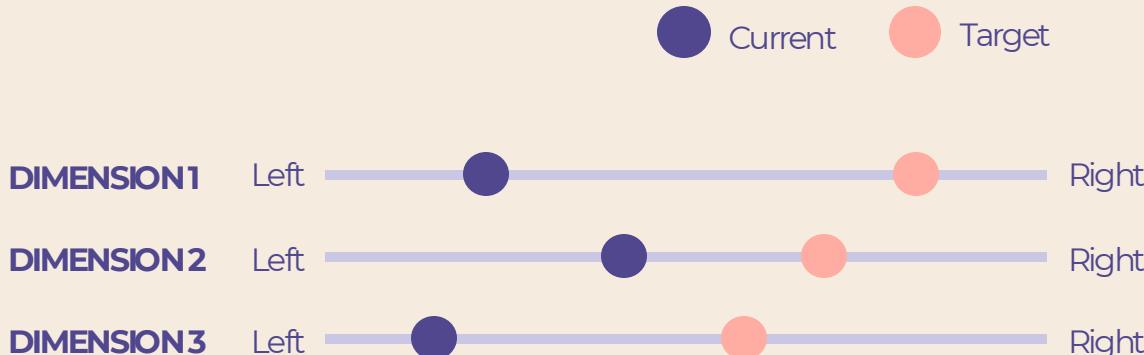
## INSIGHT

### 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.

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.

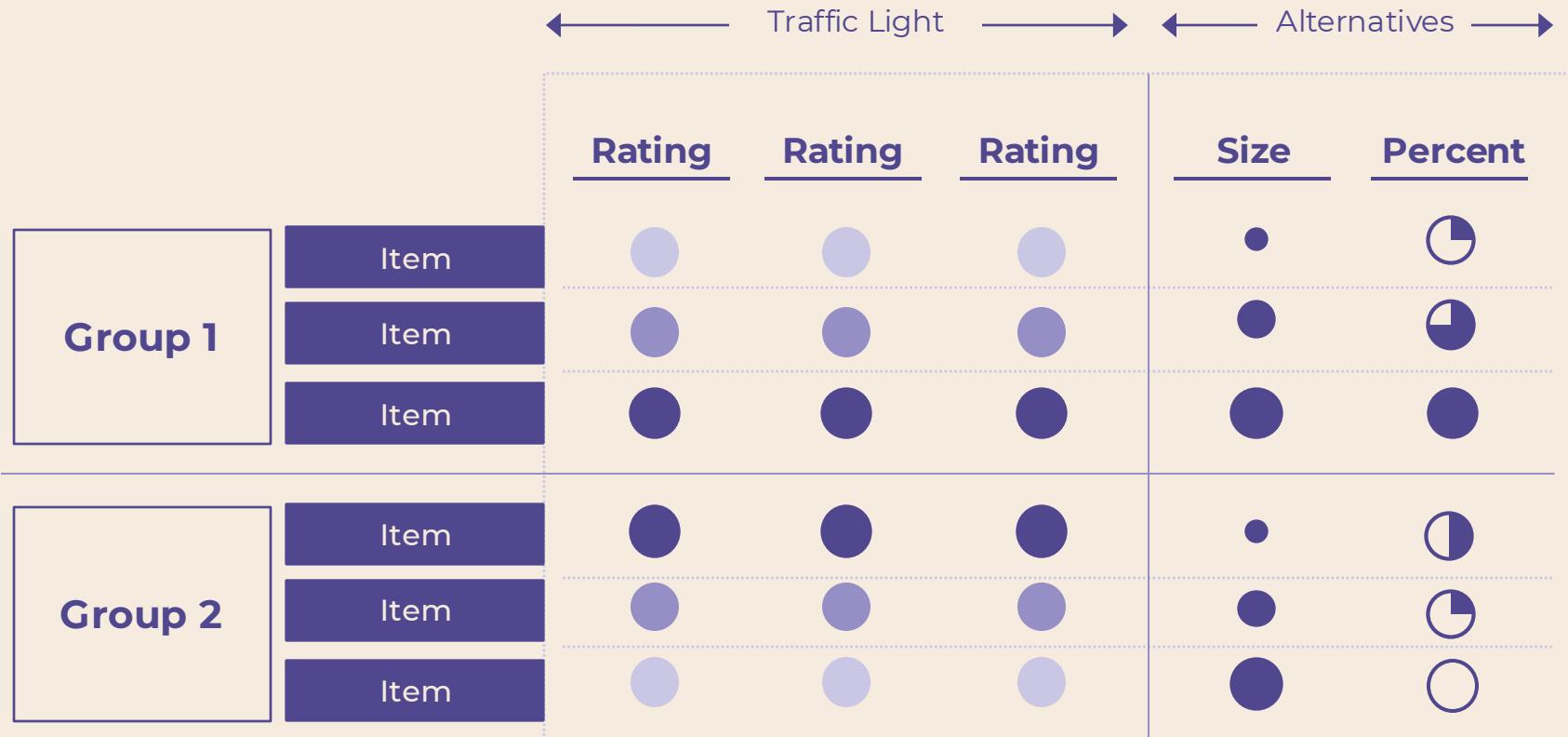


# Heat Map

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK



# Heat Map

## INSIGHT

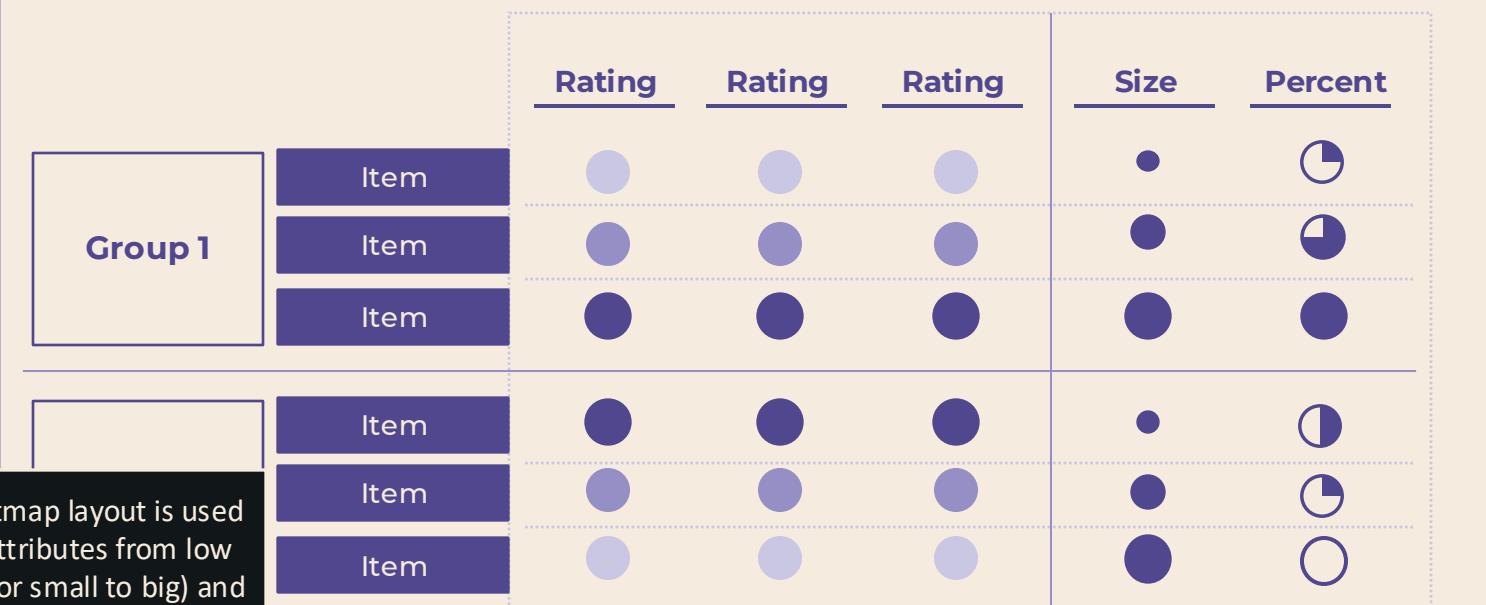
1

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 →



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

# Graph

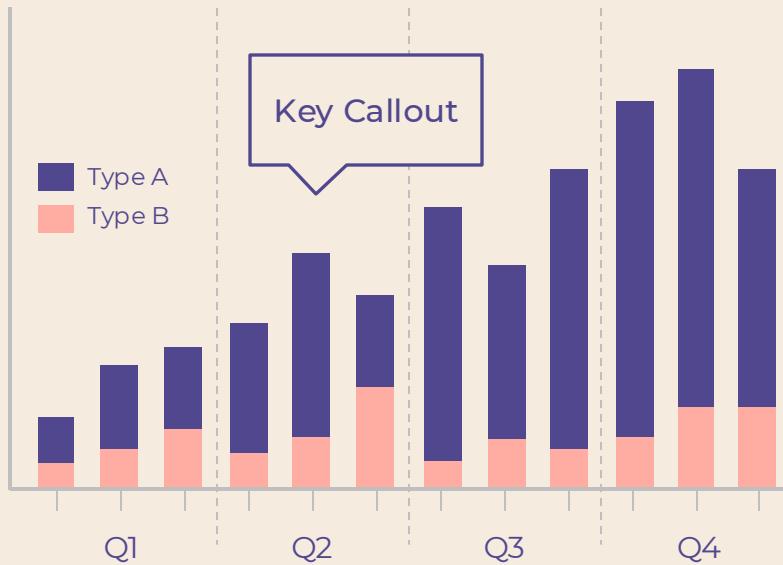
## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### Headline Statement

units



### Takeaway

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

• ...

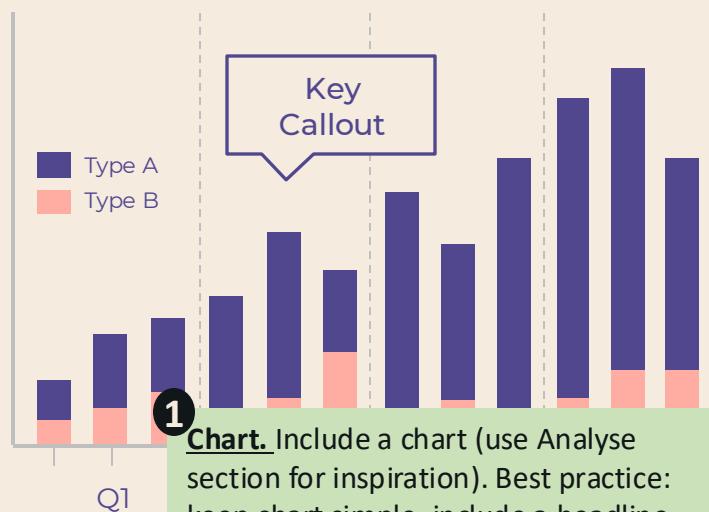
• ...

# 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

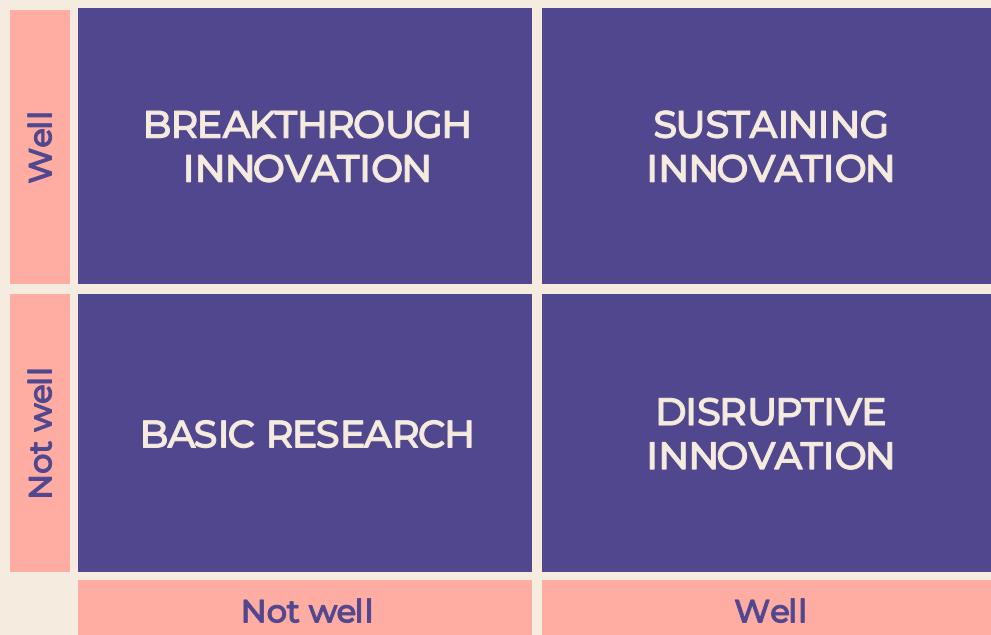
## INSIGHT

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

- 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
	Not well	BASIC RESEARCH	DISRUPTIVE INNOVATION
Not well			
	Well		

How well is the domain defined?

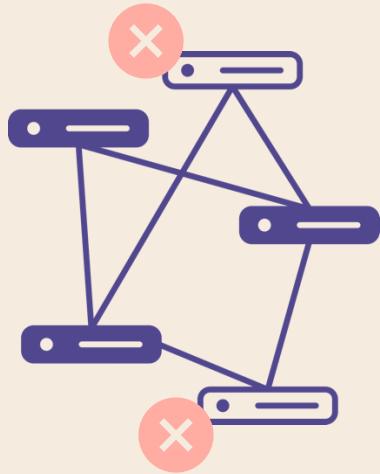
*Ref. Innovation Matrix, Greg Satell*

# From:To

## INSIGHT

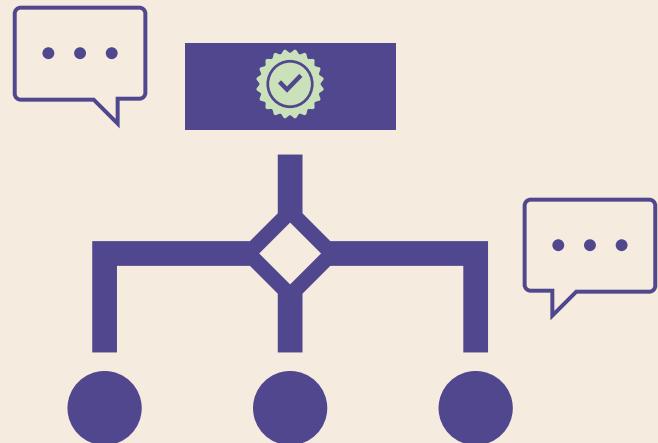
### The 'Before' and 'After' Visual

Current State



COMPLEX

Future State



SIMPLE

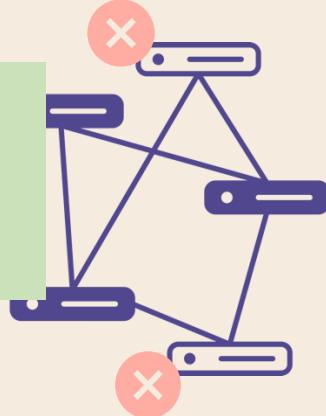
# From:To

## INSIGHT

### 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.

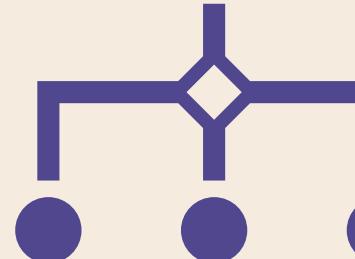


COMPLEX

#### 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.



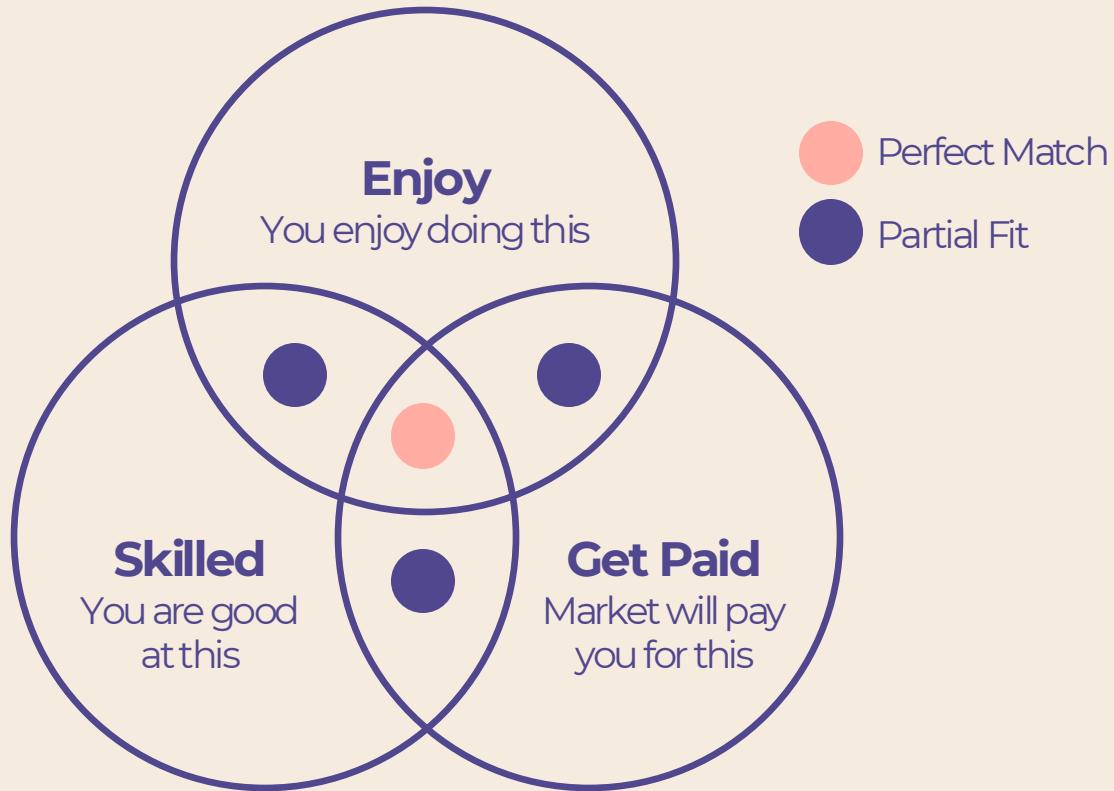
SIMPLE

# Venn INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

**'Your Purpose'**  
**Venn Diagram**  
**Example**

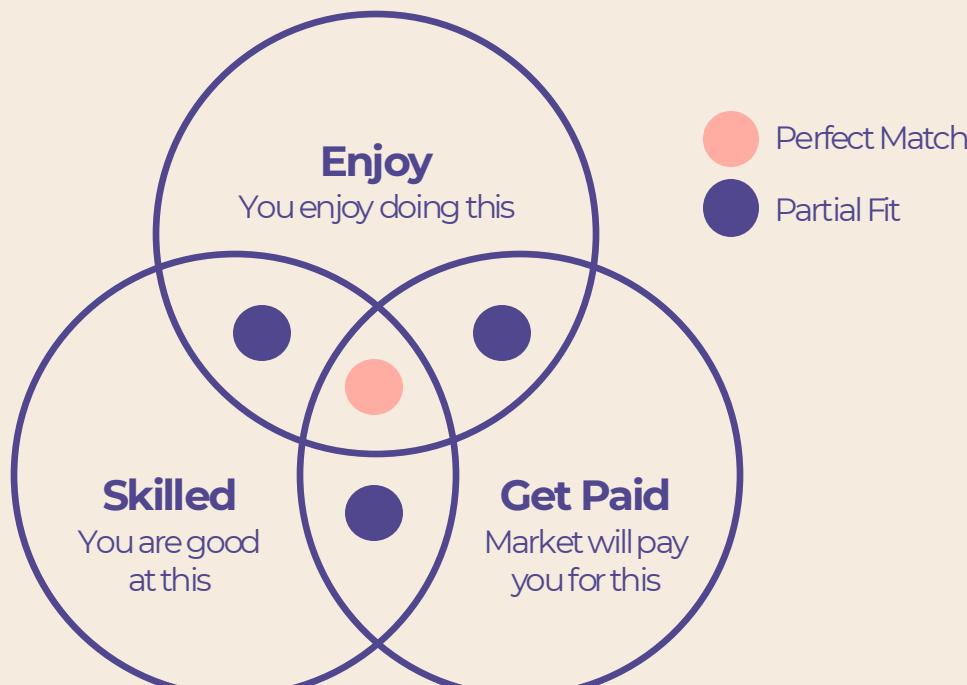


# Venn INSIGHT

INSTRUCTIONS

## 'Your Purpose' Venn Diagram Example

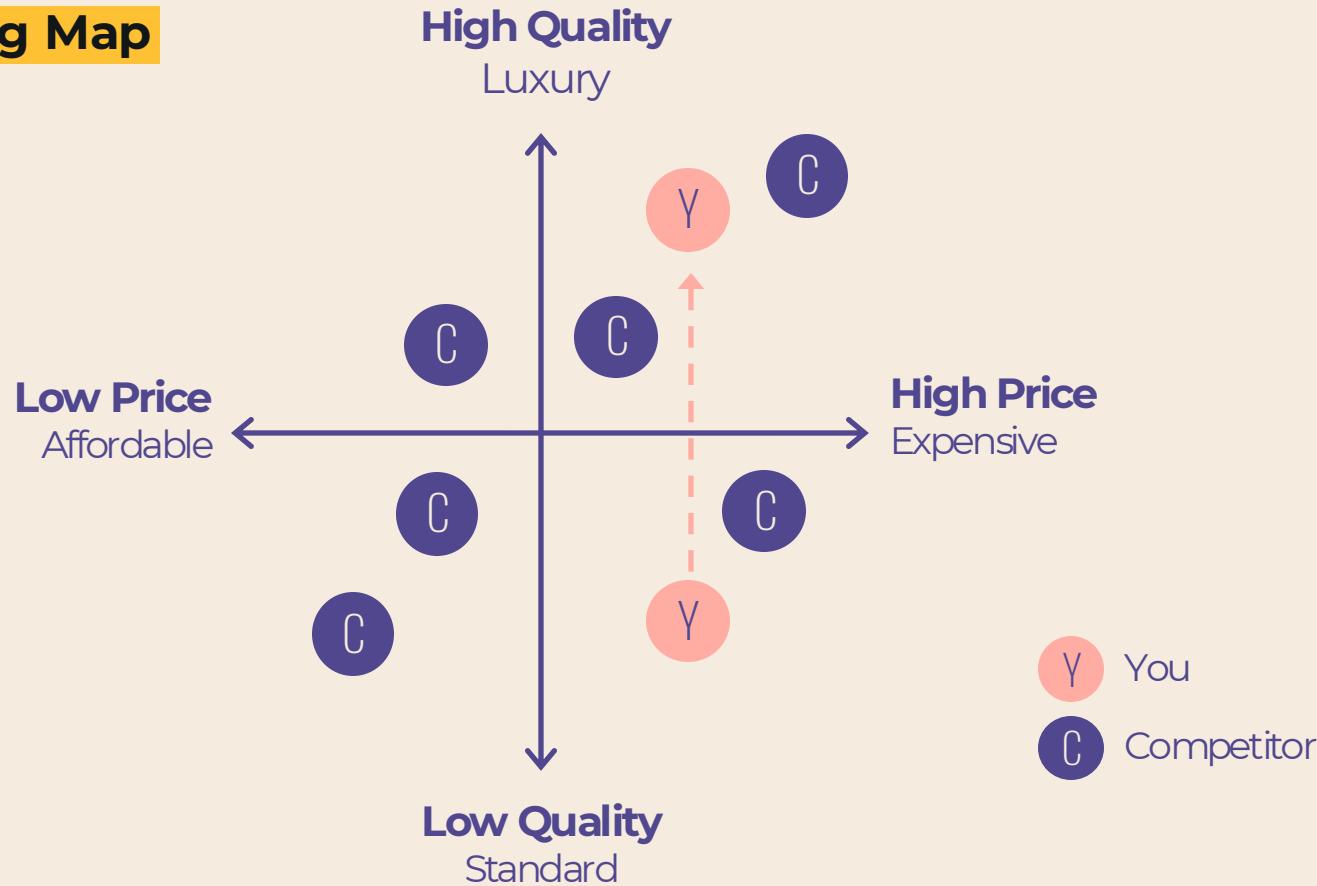
The Venn diagram is used to visualise logical relationships between 2 to 4 groups, showing where they are distinctly different vs. where they are similar and overlap.



# Positioning

## INSIGHT

### Positioning Map



# Positioning

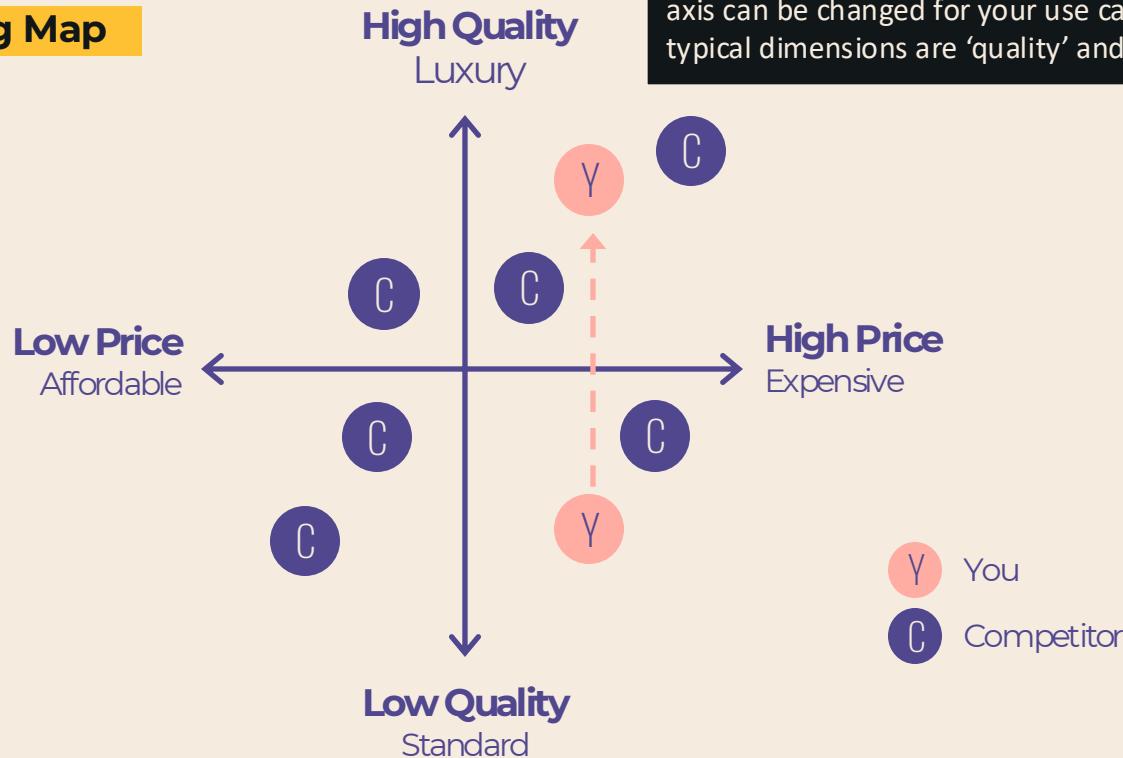
## INSIGHT

### 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’.



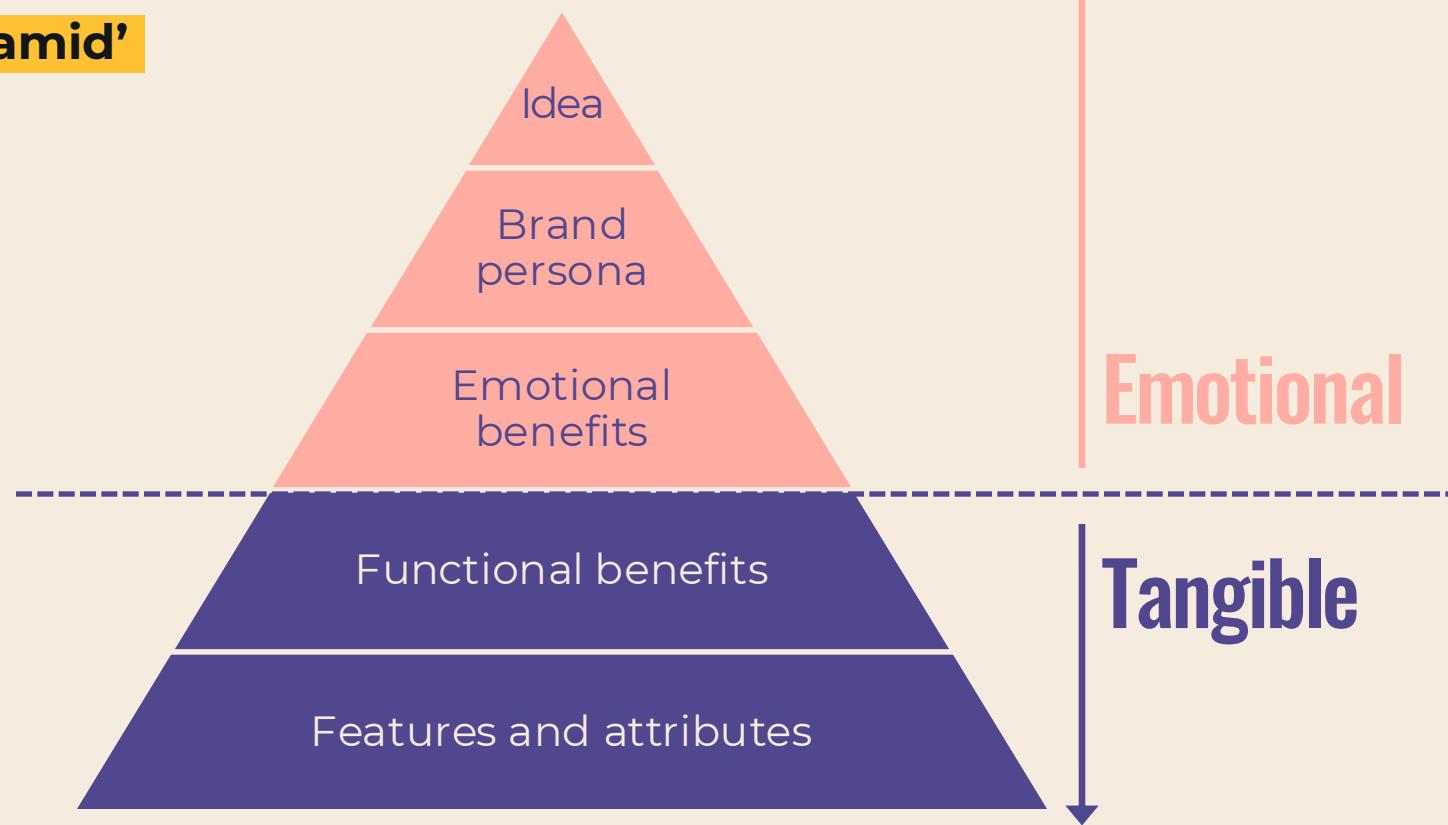
# Pyramid

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

**'Brand Pyramid'  
Example**

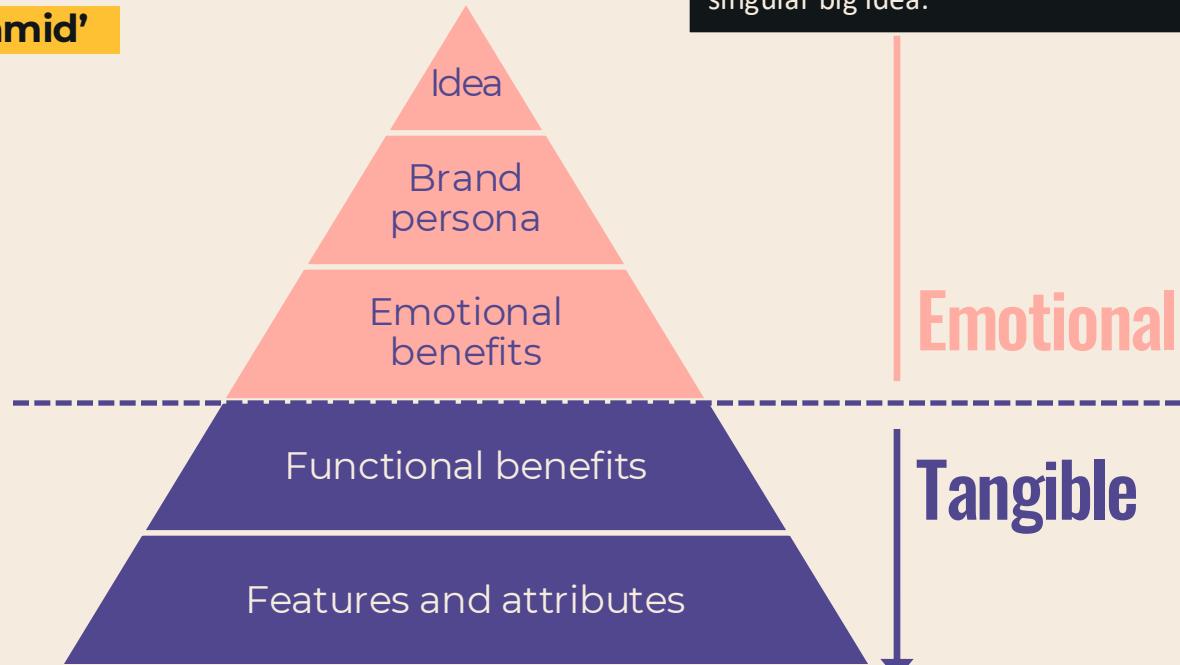


Ref. Brand Pyramid, Millward Brown

# Pyramid

## INSIGHT

### 'Brand Pyramid' Example



# Circular INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

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



*Ref. Hooked Model, Nir Eyal*

# Circular INSIGHT

## '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

### Customer Journey Map

Explore

Buy

Connect

Use

Pay

Help



Steps

Steps

Steps

Steps

Steps

Steps

Moment  
of Delight

Moment  
of Delight

# Journey

## INSIGHT

### Customer Journey Map

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.

Explore

Buy

Connect

Use

Pay

Help



Steps



Steps



Steps



Steps



Steps

2

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

Moment  
of Delight

3

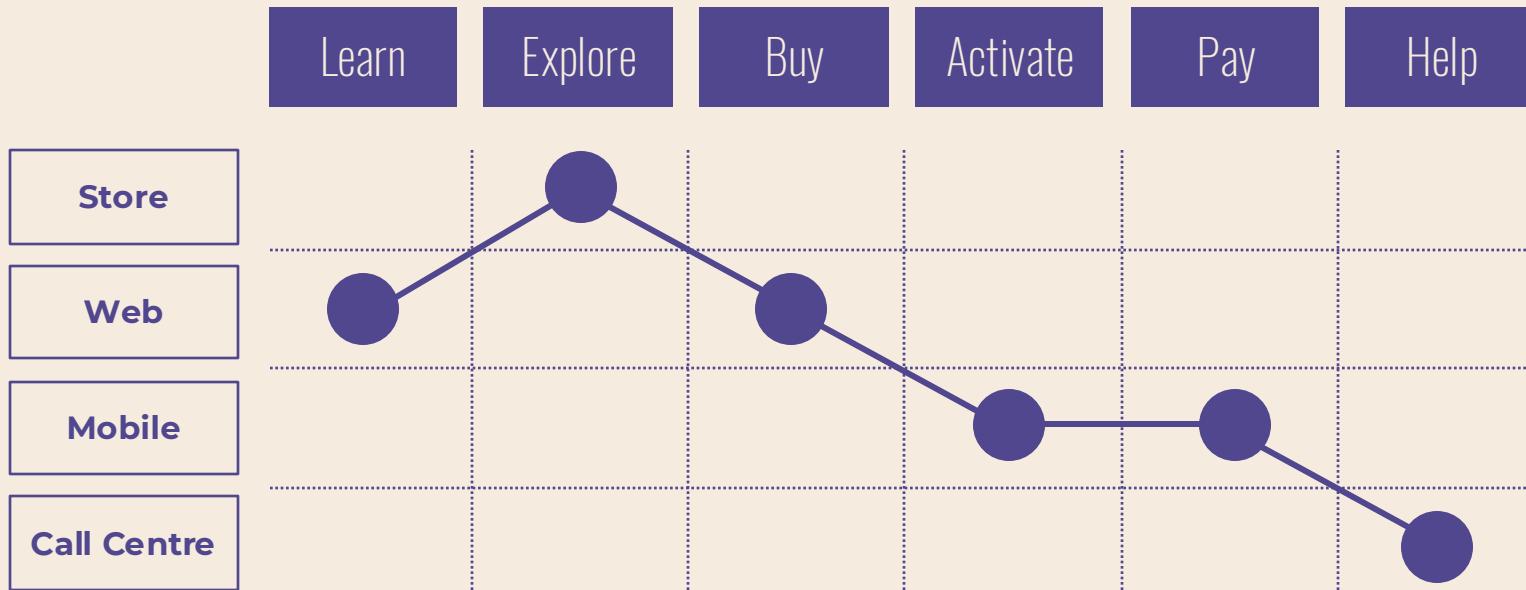
WoW Moments. Pick the signature or highlight moments of the customer journey and explicitly call it out.

Moment  
of Delight

# Touchpoint

## INSIGHT

### Multi-channel touchpoint

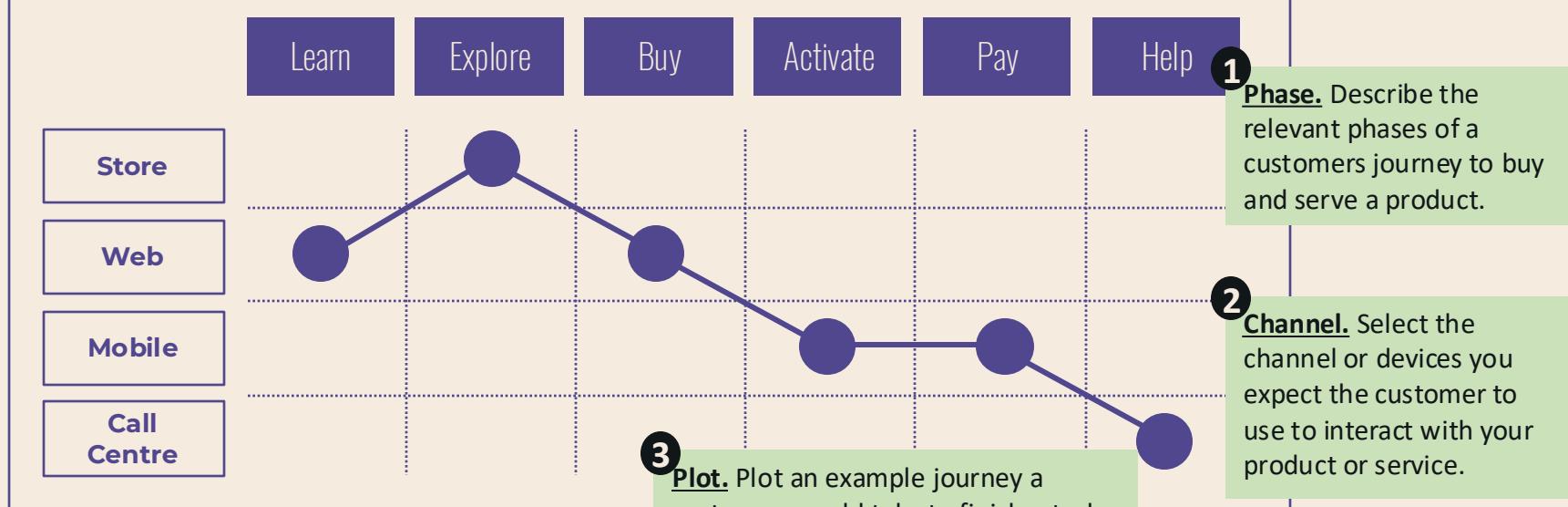


# Touchpoint

## INSIGHT

### 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

### Historical Milestones



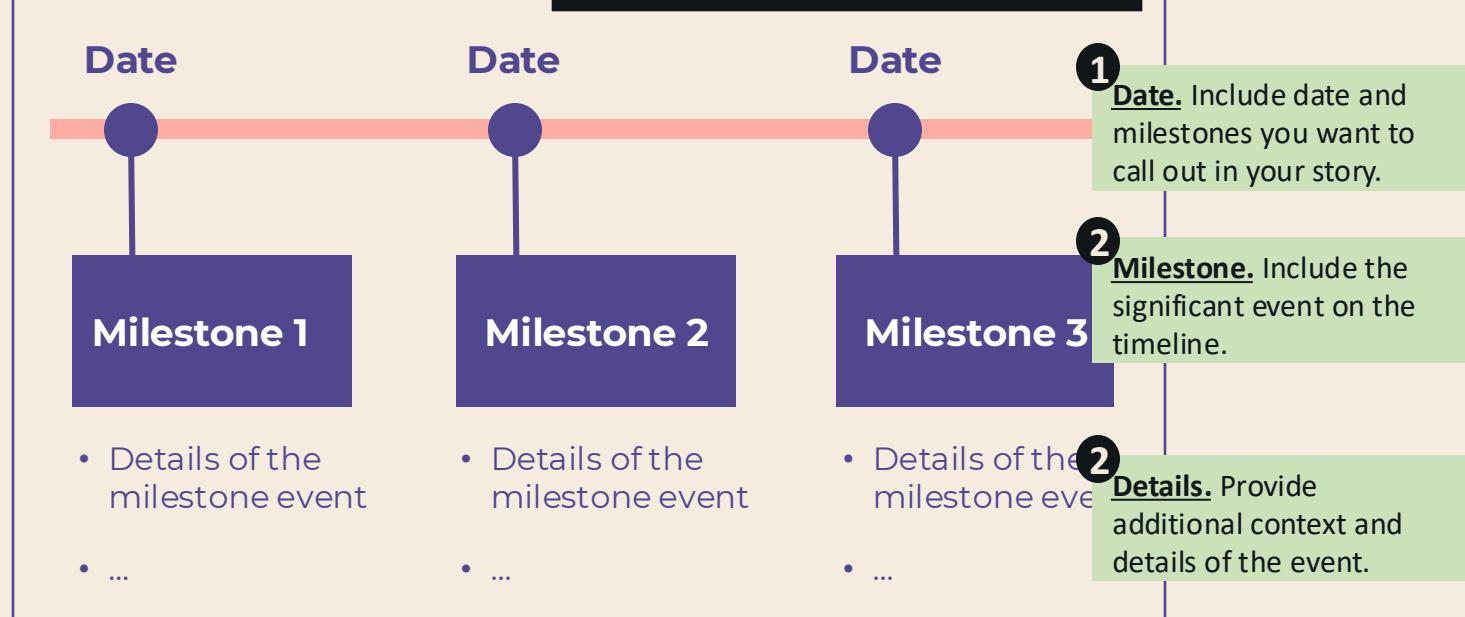
# Timeline

## INSIGHT

INSTRUCTIONS

### Historical Milestones

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



# Capability Map

## INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

### Capability Maturity



# Capability Map

## INSIGHT

### 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.



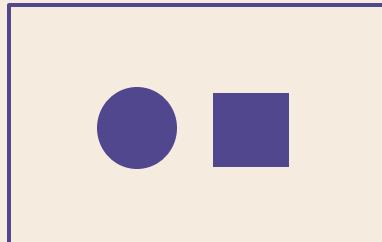
# Image Column

## INSIGHT

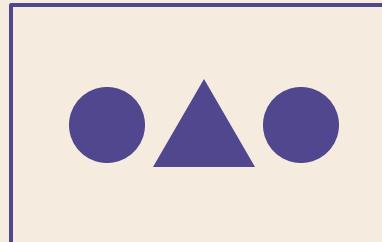
OVERNIGHT STRATEGIST

FRAMEWORK

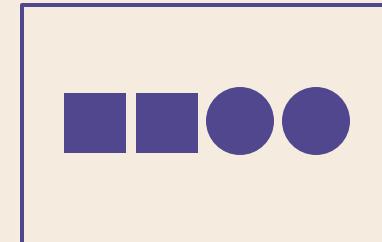
Component 1



Component 2



Component 3



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



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



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



Big Takeaway

# Image Column

## INSIGHT

INSTRUCTIONS

Variation of the tri-column text based chart. Introduce a visual diagram of the ideas that make up the big takeaway.

### 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
- ...

1

**Visual.** Create a set of visuals that represent the component of the idea.

2

**Commentary.** Describe the key points or evidences to support the component.

3

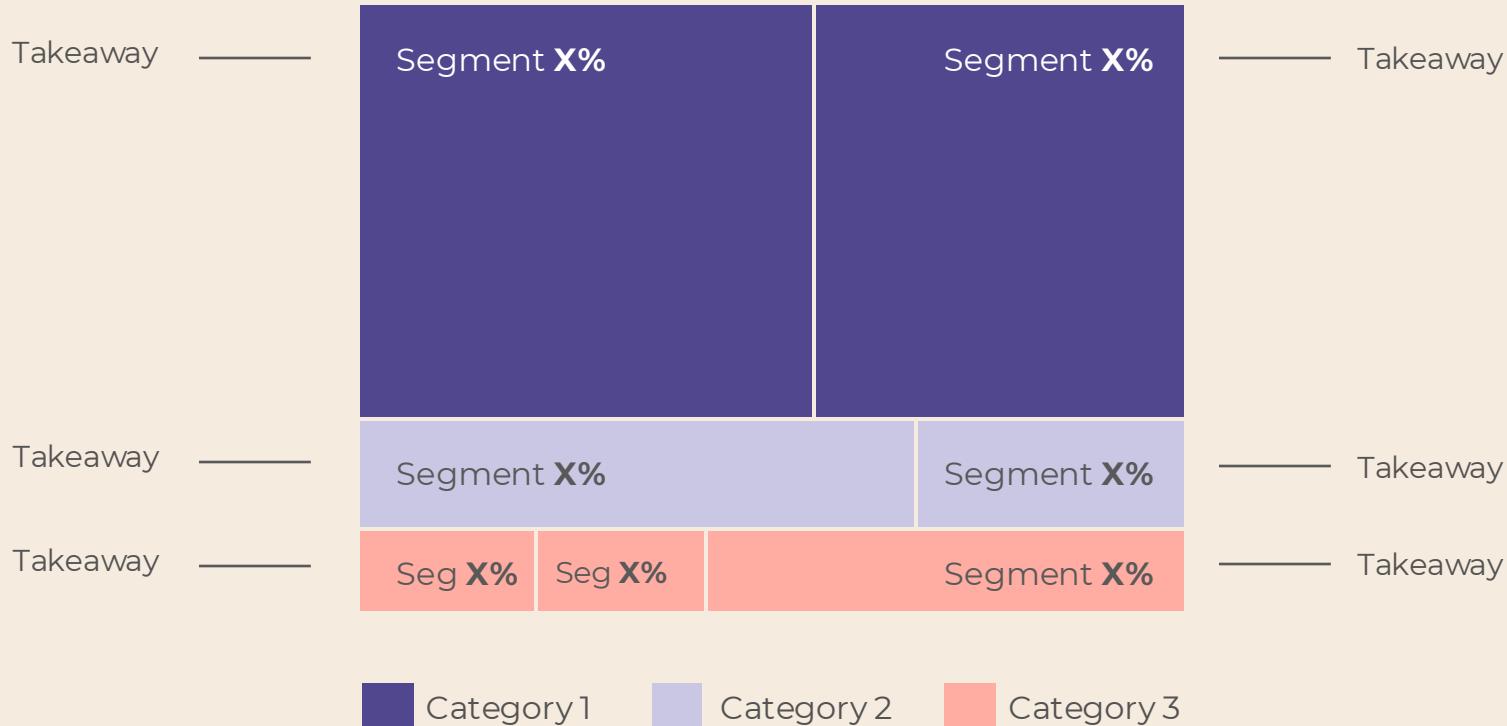
**Big Takeaway.** State the big insight or takeaway of the page, encapsulating the 3 components.

## Big Takeaway

# Segmentation

## INSIGHT

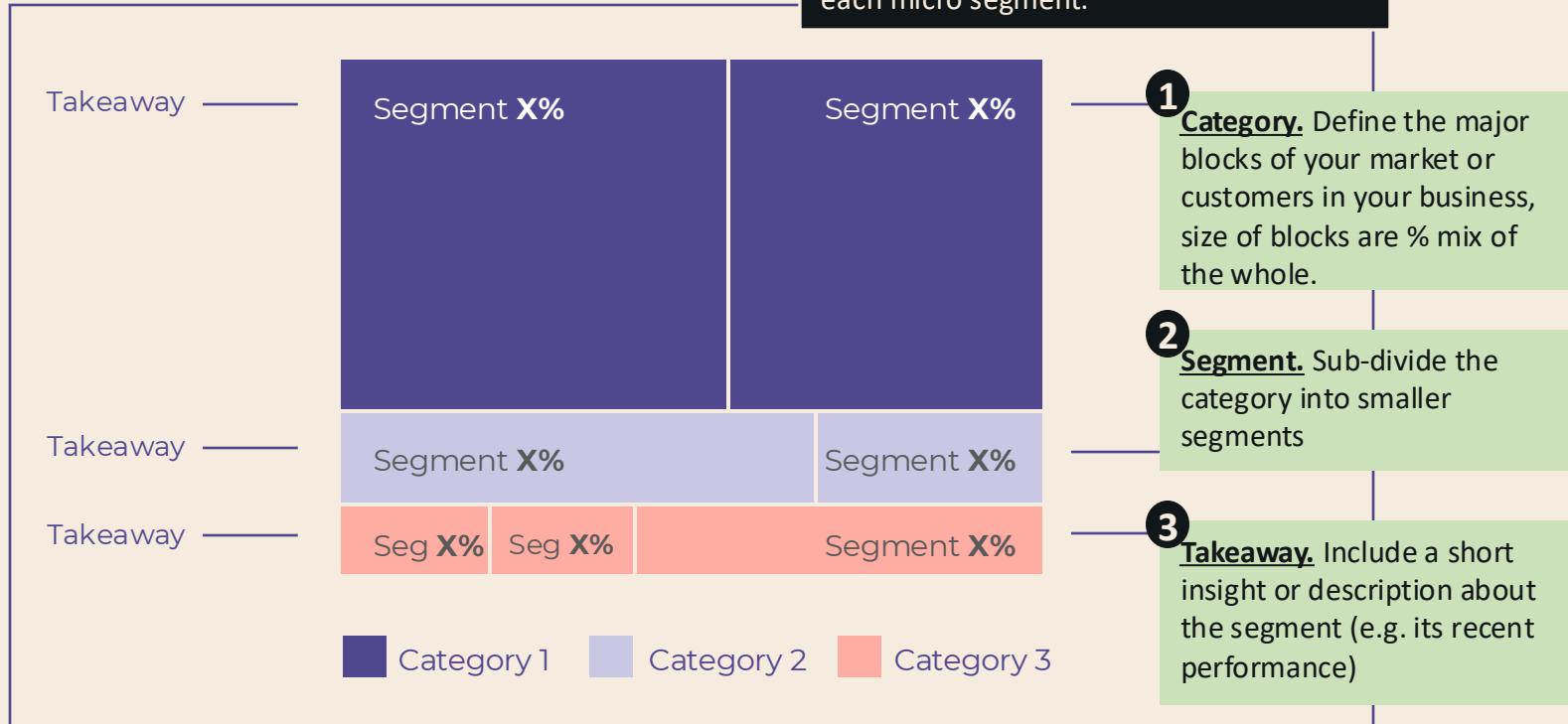
### Market Or Customer Segments



# Segmentation

## INSIGHT

### Market Or Customer Segments



# Hub n' Spoke

## INSIGHT

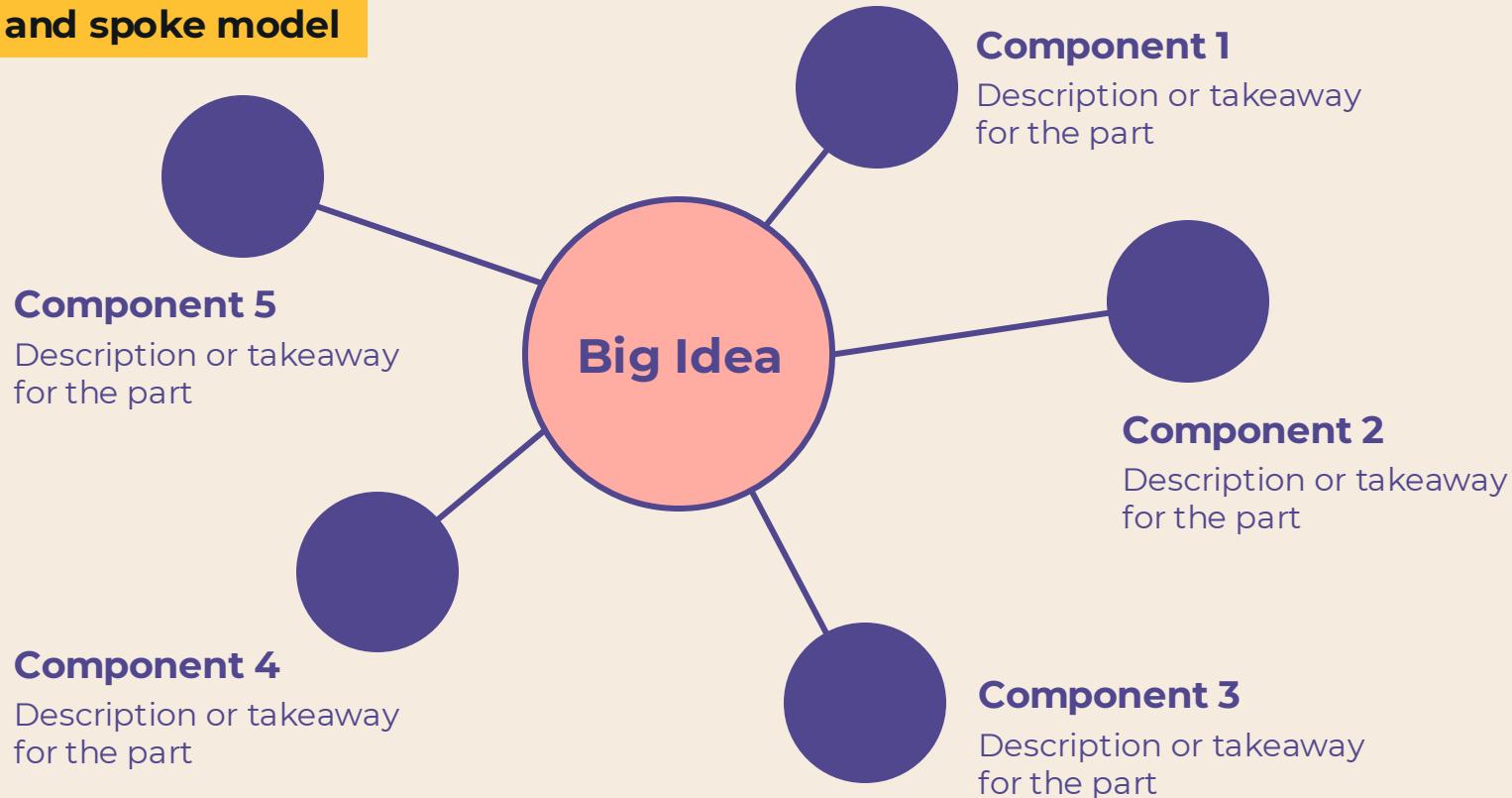
OVERNIGHT STRATEGIST

FRAMEWORK

+

INSTRUCTIONS

Hub and spoke model



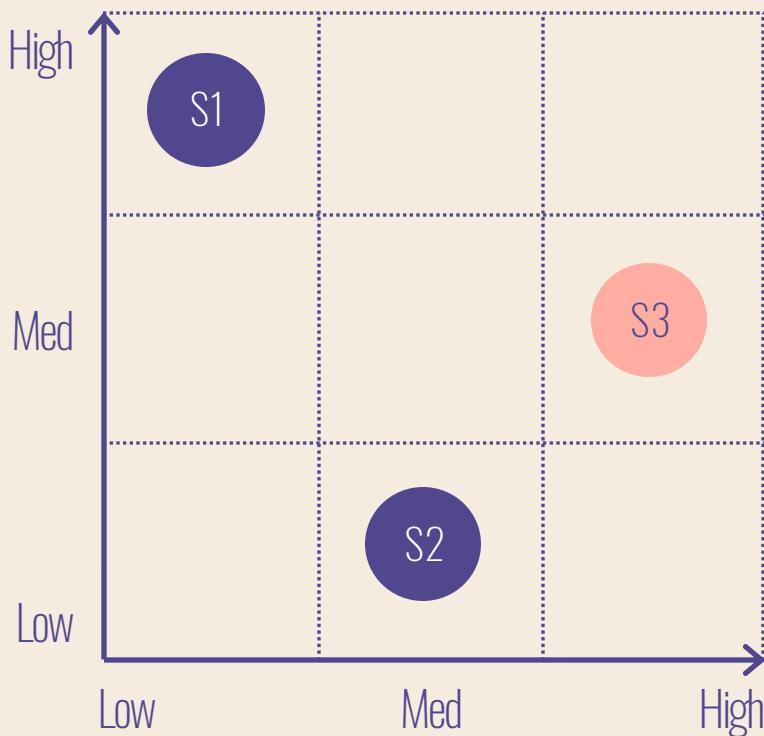
# 3x3 Model

## INSIGHT

### Segment Assessment

#### Ability To Win

e.g. competition, value prop, capability



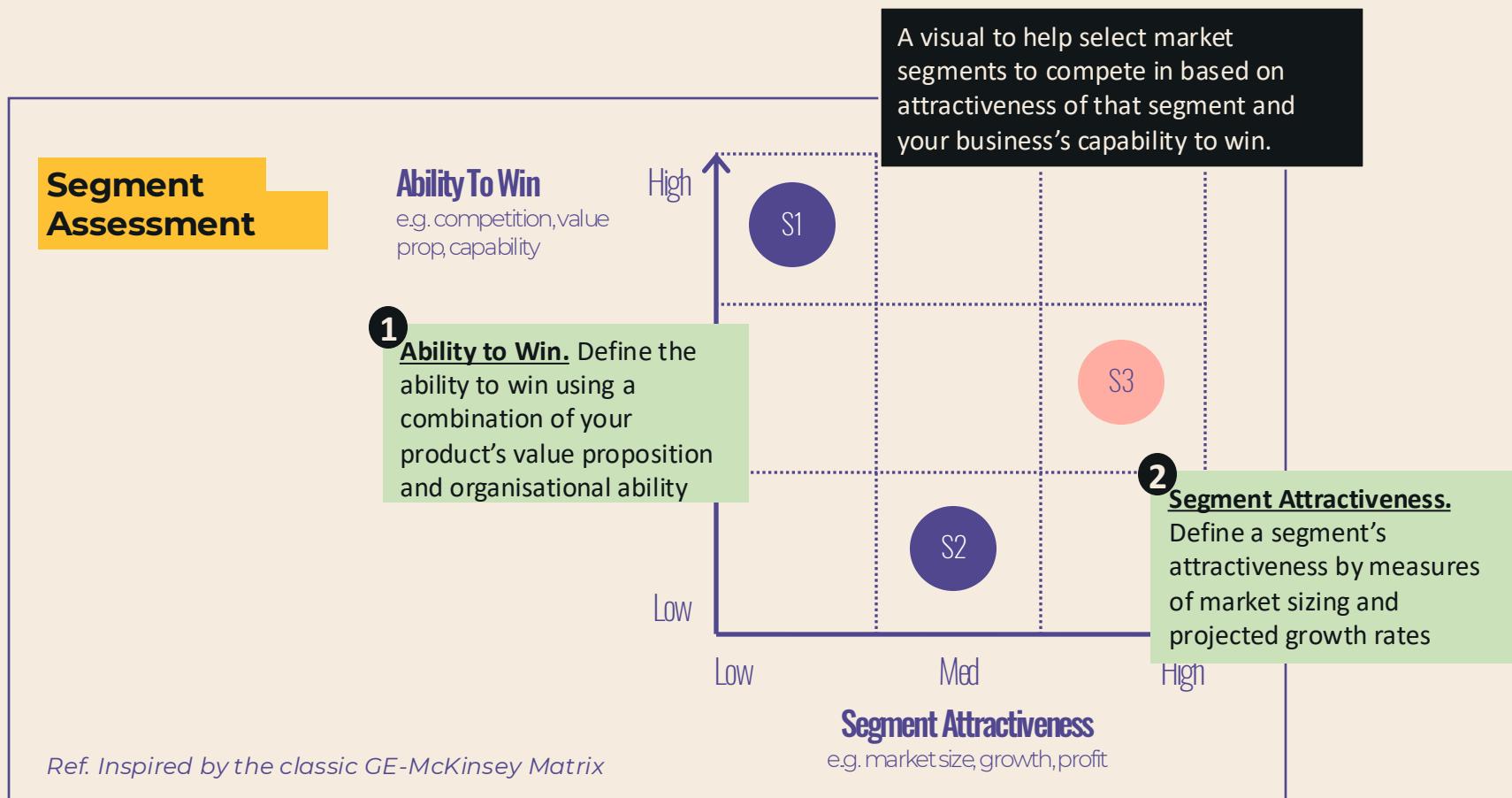
Ref. Inspired by the classic GE-McKinsey Matrix

#### Segment Attractiveness

e.g. market size, growth, profit

# 3x3 Model

## INSIGHT



Ref. Inspired by the classic GE-McKinsey Matrix

# Story

## Story Frameworks

### Strategic Storytelling

Minto Pyramid

HV Logic

MECE

SCQA

### Alternative Frameworks

Story Spine

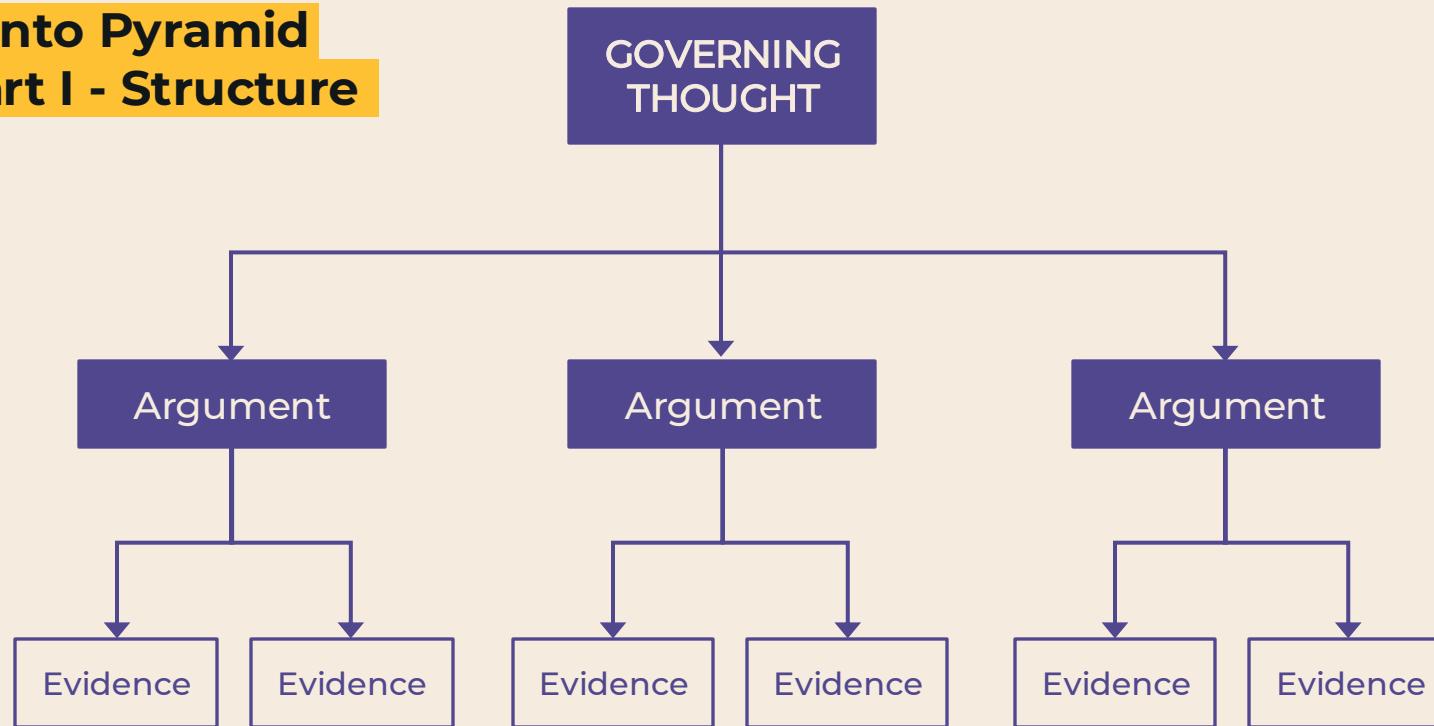
5 Act

StoryBrand

# Minto Pyramid

## STORY

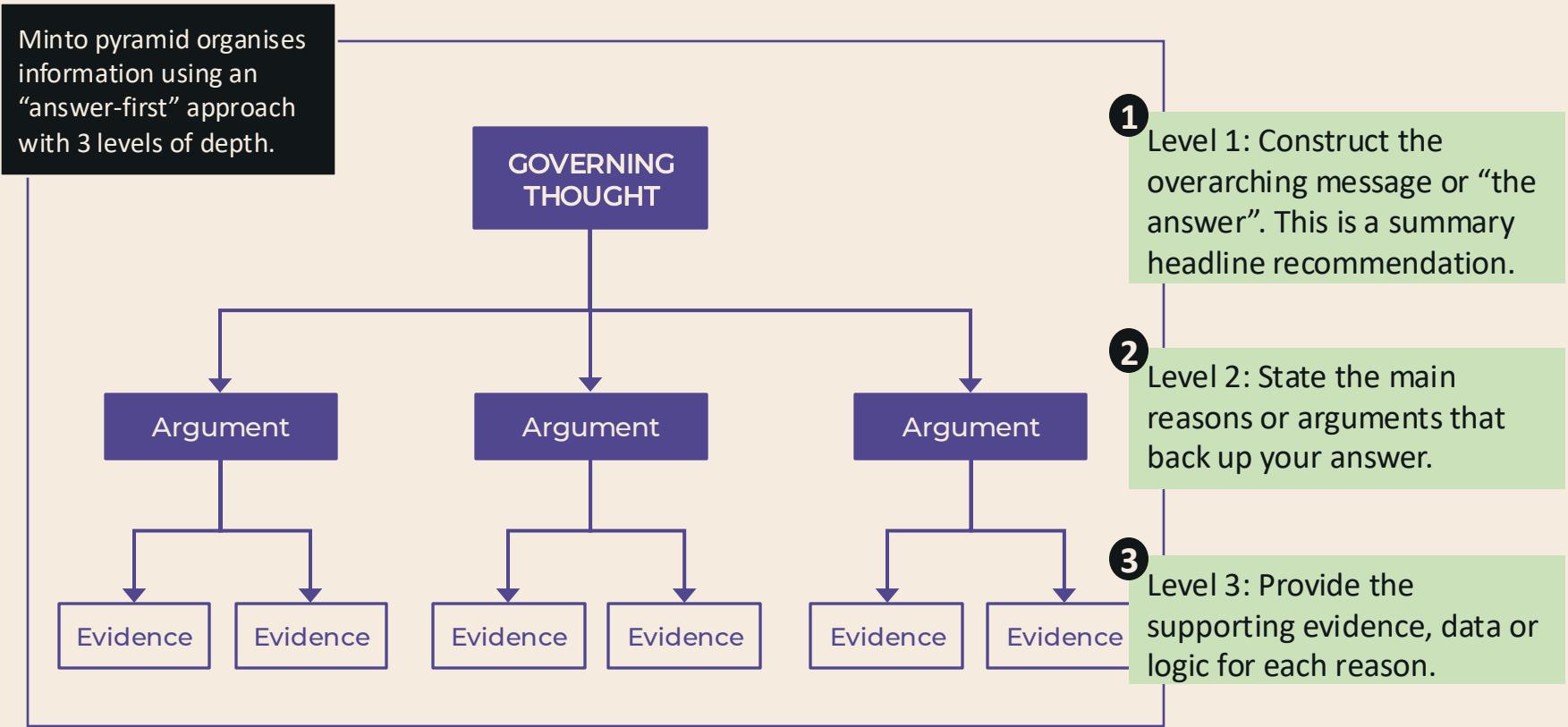
### Minto Pyramid Part I - Structure



Ref. Barbara Minto, *The Minto Pyramid Principle*

# Minto Pyramid

## STORY



# HV Logic

## STORY

OVERNIGHT STRATEGIST

FRAMEWORK

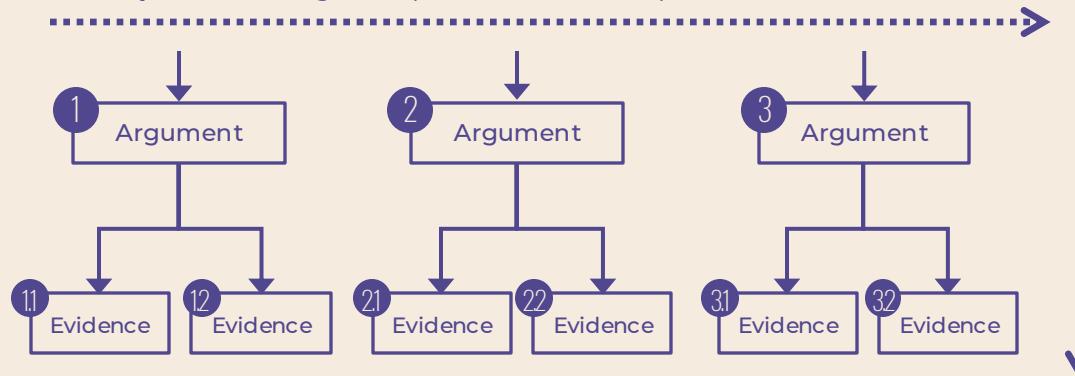
+

INSTRUCTIONS

## 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.



Minto Pyramid  
Part II – Horizontal & Vertical Logic

## 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

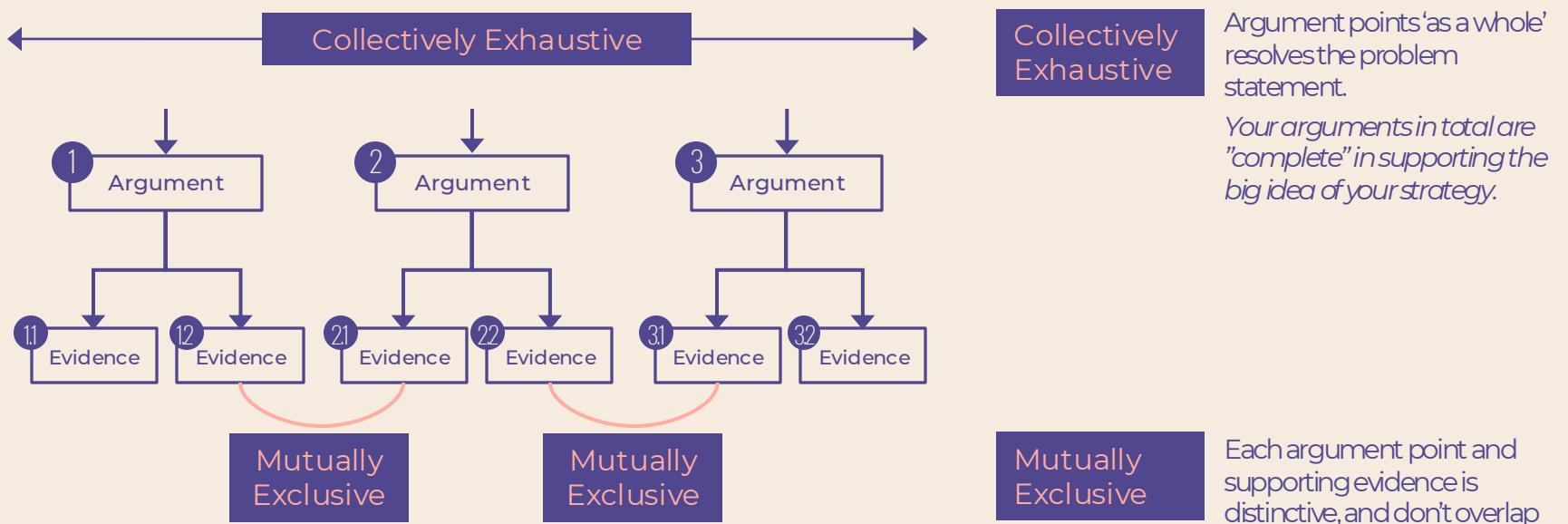
OVERNIGHT STRATEGIST

FRAMEWORK



INSTRUCTIONS

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



Ref. Barbara Minto, *The Minto Pyramid Principle*

# SCQA

## STORY

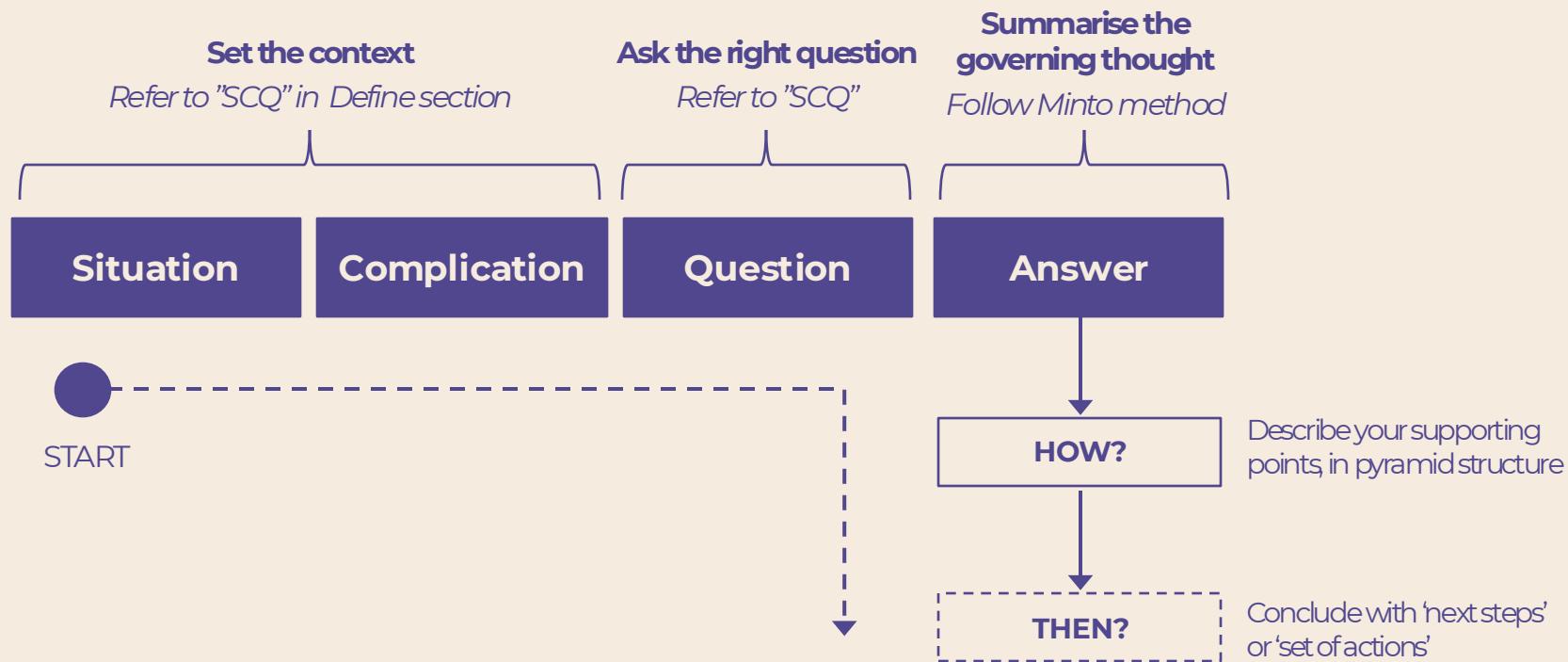
OVERNIGHT STRATEGIST

FRAMEWORK

+

INSTRUCTIONS

### Situation-Complication- Question-Answer Framework



# Story Spine

## STORY

**The Story Spine aka  
Pixar Storytelling Framework**

Once upon a time there was \_.

Beginning

Every day, \_.

But, one day \_.

Event

Because of that, \_.

Middle

Because of that, \_.

Climax

Until finally \_.

Ref. Kenn Adams, *The Story Spine*

# Story Spine

## STORY

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 – it's better to have the “climax” (the end state) described early on in the deck.

Once upon a time there was ...

**Beginning**

Every day, ...

**Event**

But, one day ...

**Middle**

Because of that, ...

**Climax**

Because of that, ...

Until finally ...

Ref. Kenn Adams, *The Story Spine*

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.

# 5 ACT STORY

OVERNIGHT STRATEGIST  
FRAMEWORK

## 5 Act Story Framework

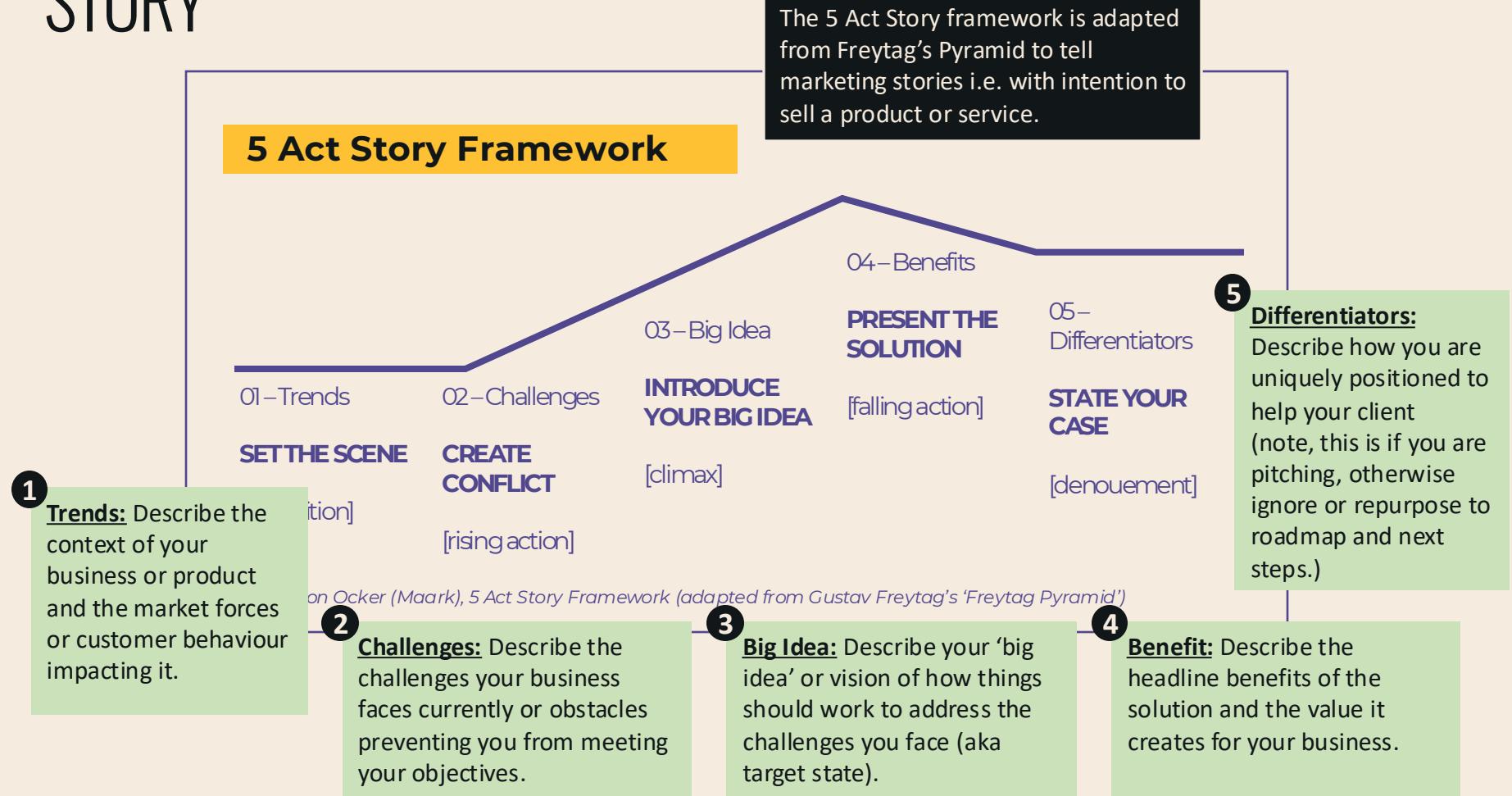


Ref. Jason Ocker (Maark), 5 Act Story Framework (adapted from Gustav Freytag's 'Freytag Pyramid')

# 5 ACT STORY

OVERNIGHT STRATEGIST

INSTRUCTIONS



# StoryBrand

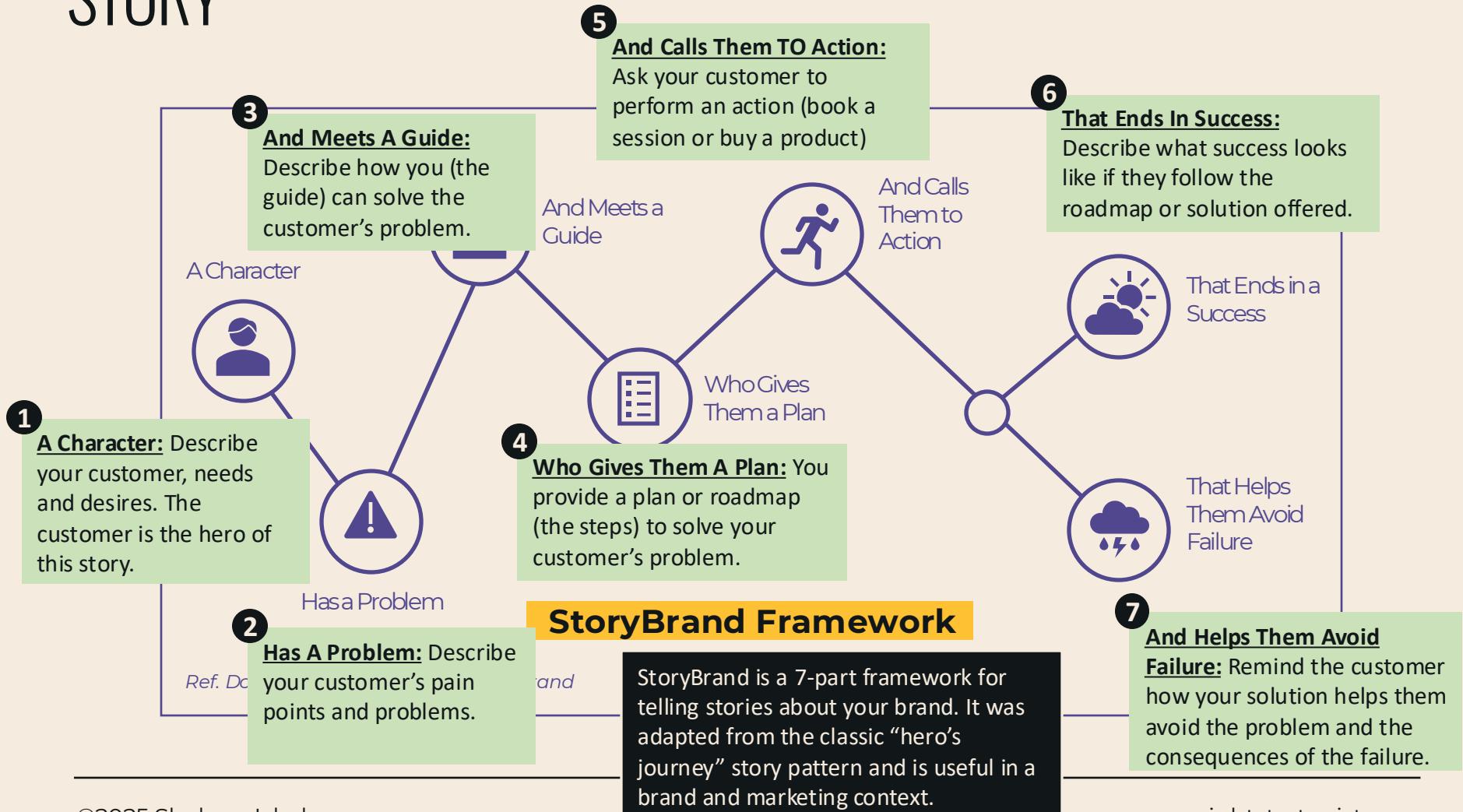
## STORY



Ref. Donald Miller, *Building a Story Brand*

# StoryBrand

## STORY



# Decide

## Decision Models

**Broad**  
appeal

**Option**  
review

**2 Speed**  
model

**Difficult**  
decisions

Eisenhower

Eisenhower Box  
Mental Model

Decision Tree

Decision-Chance  
Node Tree

Bezos

High Quality, High  
Speed Decisions

SPADE

Setting-People-  
Alternatives-Decide-  
Explain Framework

ABCD

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

Pros & Cons

Simple option  
evaluation model

Bull & Bear

Upper and lower  
scenarios

Evaluation

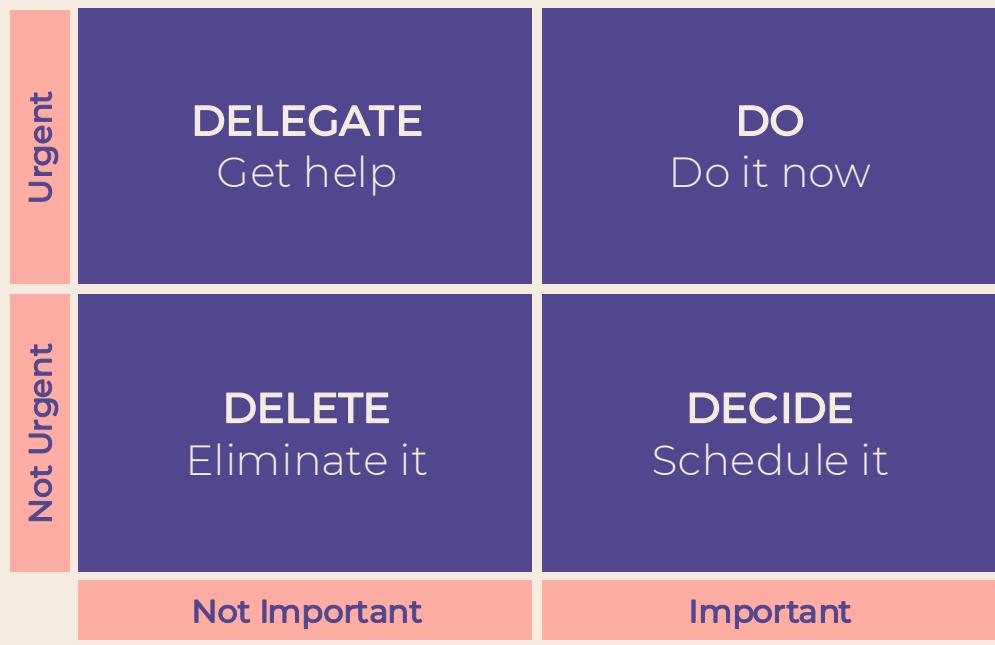
Criteria-based option  
evaluation model

# Eisenhower

## DECIDE

### Eisenhower Box – Mental Model

How time critical  
is the issue?



How important is the issue?

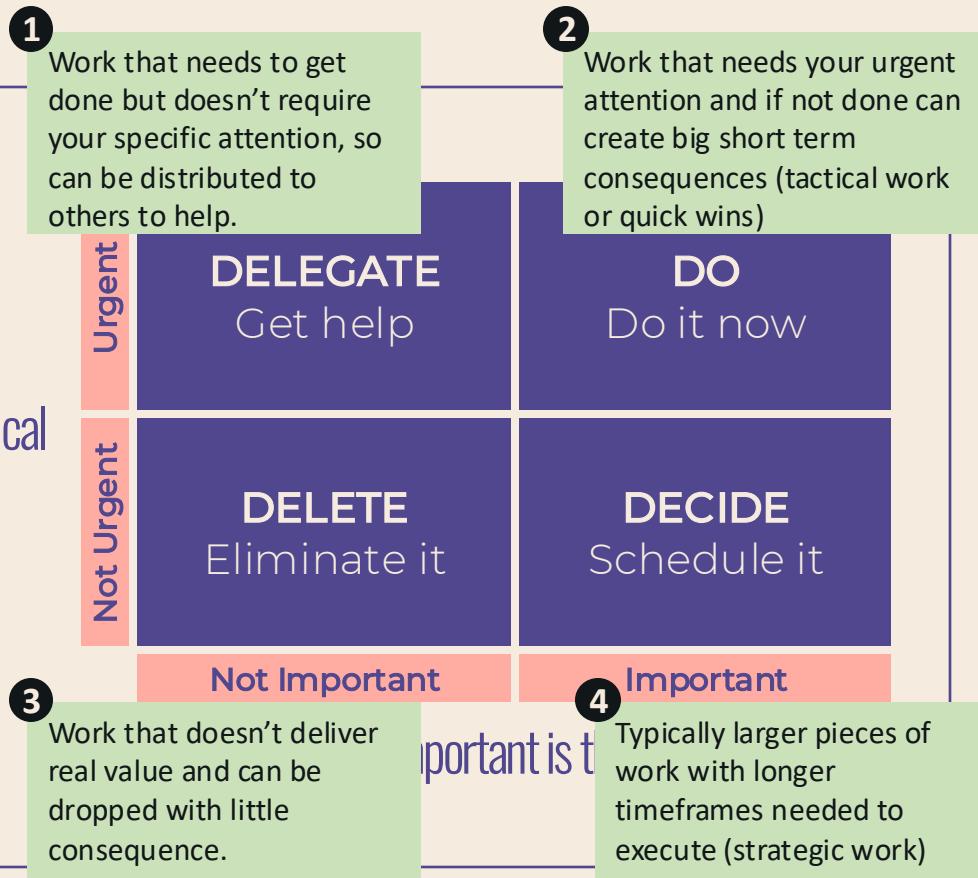
# Eisenhower

## DECIDE

### 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

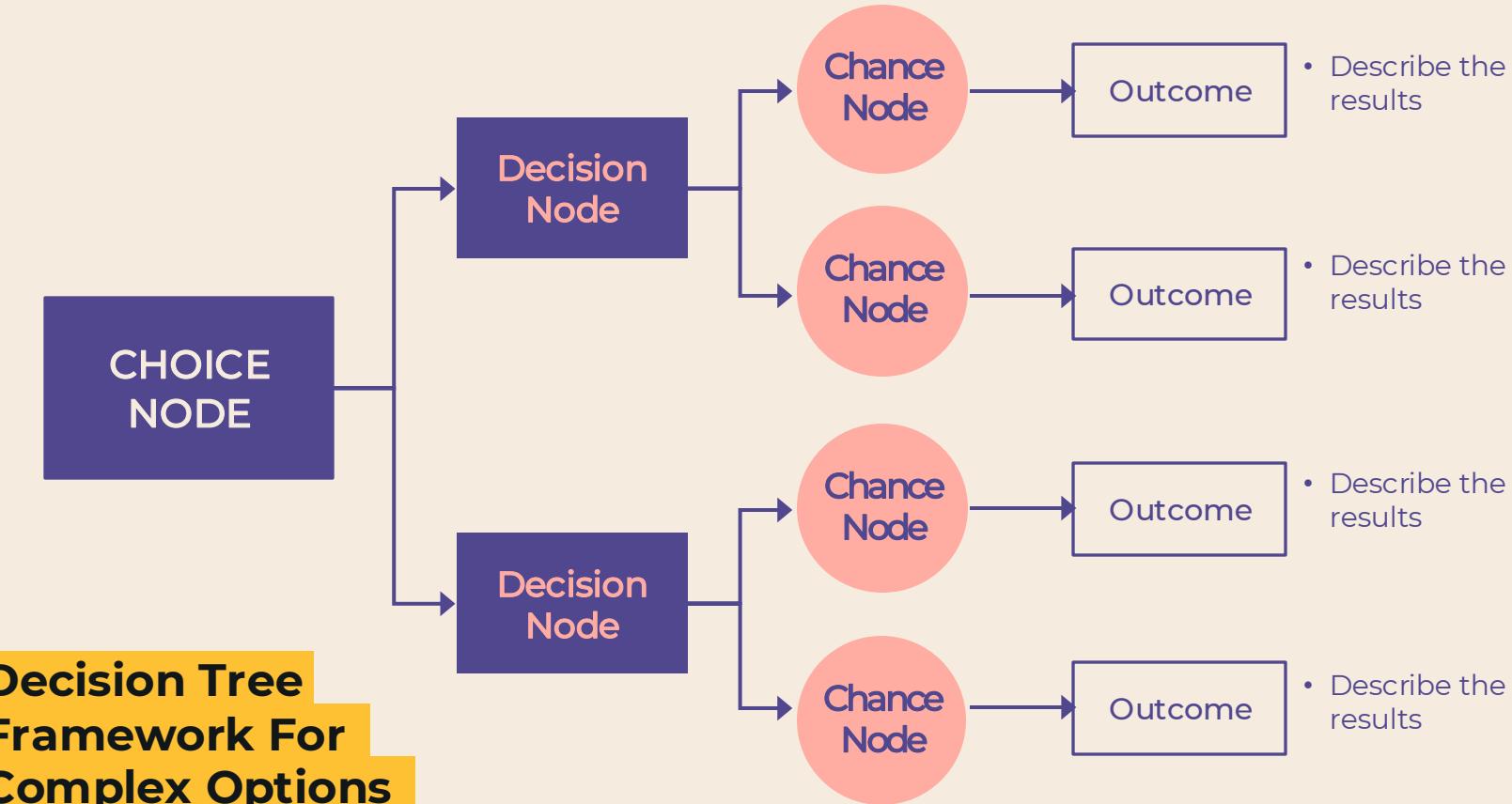
Broad	<b>Big-bet decisions</b> with major consequences for the company, often involving situations with unclear right or wrong choices	<b>Cross-cutting decisions</b> that are frequent and require broad collaboration across organisational boundaries
Narrow	<b>Ad hoc decisions</b> that arise episodically; 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



# Decision Tree

## DECIDE

Decision tree framework is useful for breaking down and analysing complex options and their likelihood of success.

### CHOICE NODE

#### Decision Tree Framework For Complex Options

1

**Decision Node** represent the key options you are reviewing (and arrows are the branches of that option)

### Decision Node

2

**Chance Node** represent the possible outcomes of that option (for example the option has a % chance to make big \$\$\$ or small \$)

### Decision Node

3

**Outcome** represent the result or value of a specific chance node. The weighted results of each chance node can be summed for the expected value of the decision (option).

- Describe the results

### Chance Node

### Outcome

- Describe the results

- Describe the results

- Describe the results

- Describe the results

# 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>	<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			

# Pros & Cons

## DECIDE

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.

Pros

Cons

### Option #1

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

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

Trade-offs

Recommended

### 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

# Evaluation

DECIDE

OVERNIGHT STRATEGIST

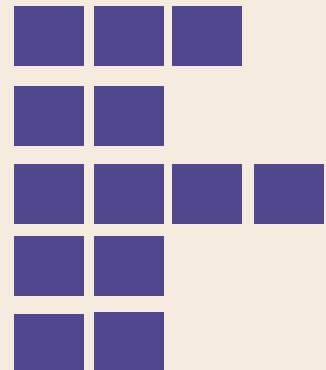
FRAMEWORK

## Evaluating Options

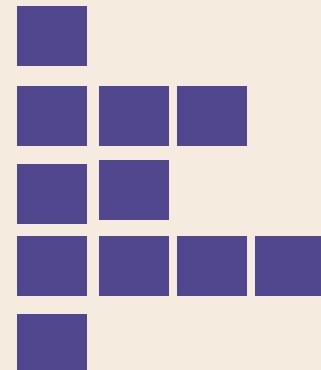
### Option #1

Criteria A	██████
Criteria B	██████
Criteria C	██
Criteria D	███
Criteria E	██

### Option #2



### Option #3



Takeaway

Takeaway

Takeaway

# Evaluation

## DECIDE

1

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

2

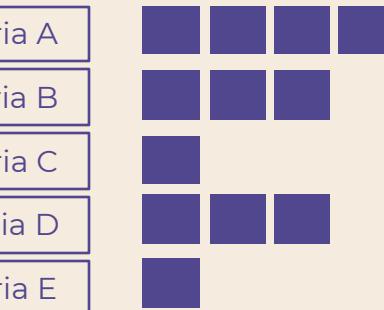
**Criteria.** Select a set of criteria that you can use to rate each option. [Optional] You can also weight each criteria score and create a weighted average result for the scenario.

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

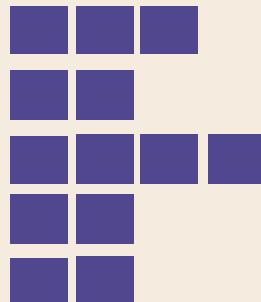
#### Option #1



Takeaway

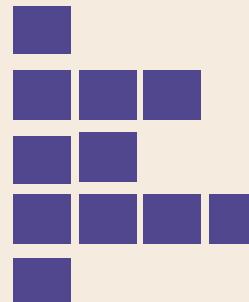
Recommended

#### Option #2



Takeaway

#### Option #3



Takeaway

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

# 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

OVERNIGHT STRATEGIST

FRAMEWORK

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

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.

#### 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.

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.

Ref. Jeff Bezos, Letter to Amazon Shareholders 2015

# SPADE

DECIDE

OVERNIGHT STRATEGIST

FRAMEWORK

## Square's Decision Making Framework

S	P	A	D	E
Setting	People	Alternatives	Decide	Explain
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

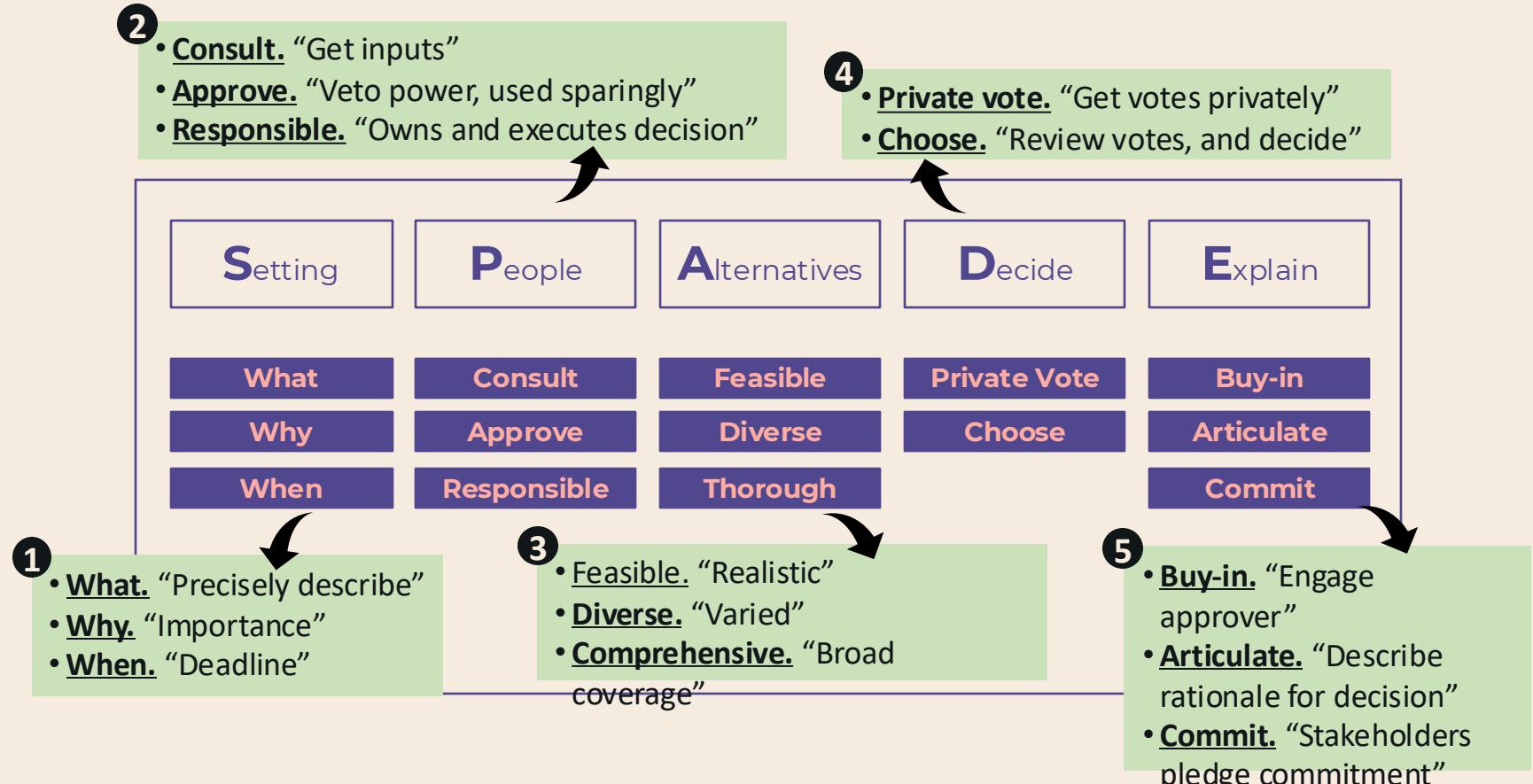
# SPADE

## DECIDE

OVERNIGHT STRATEGIST

FRAMEWORK

Framework for  
difficult decisions  
used at Square

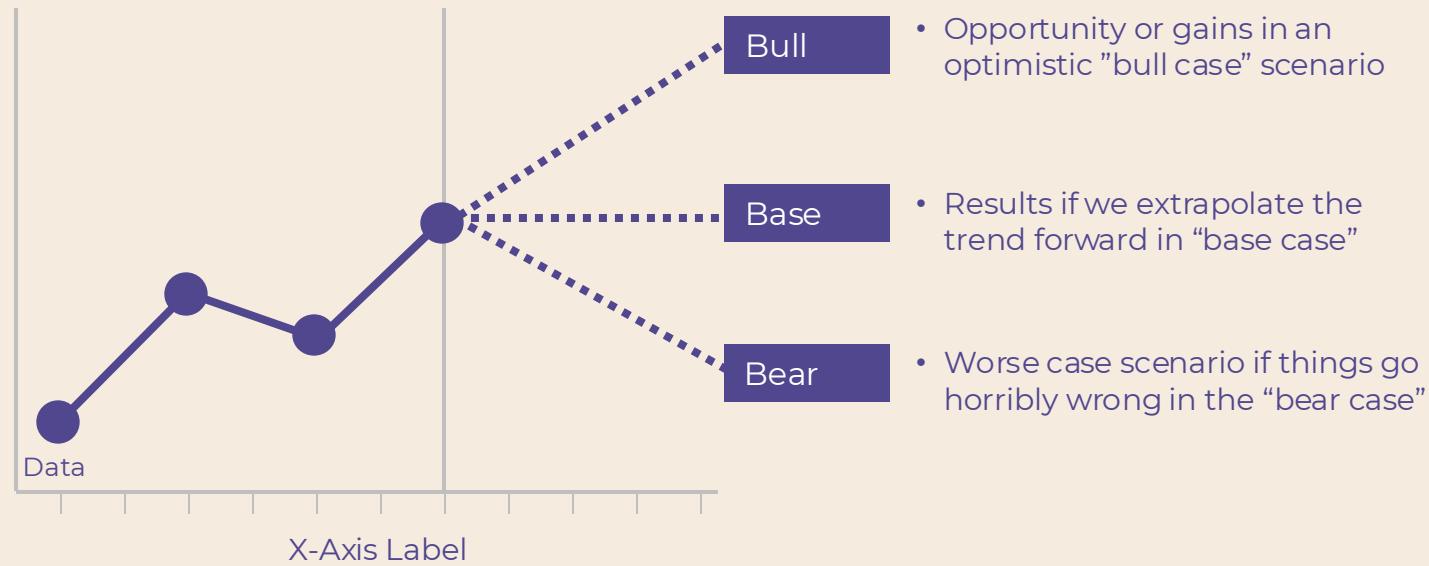


# Bull & Bear

DECIDE

**Chart Title**

units

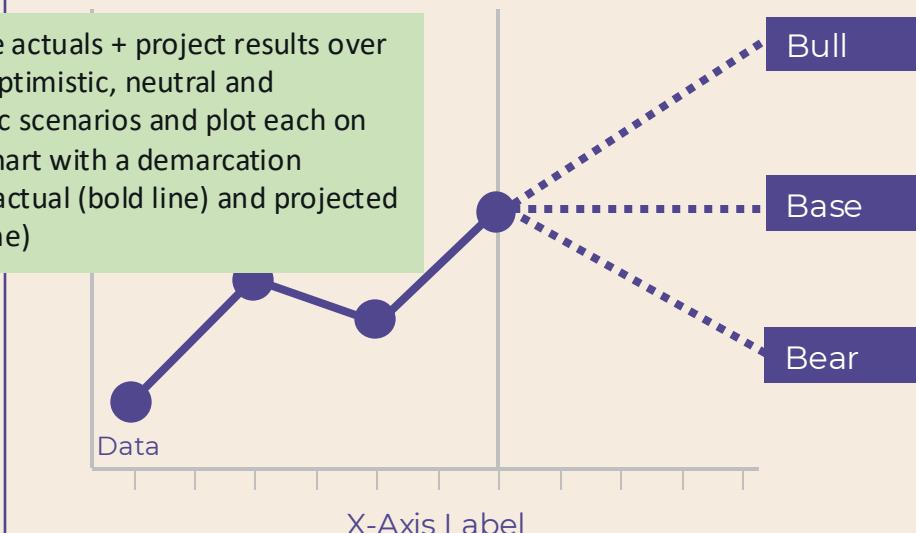


# Bull & Bear

## ANALYSE

### 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)



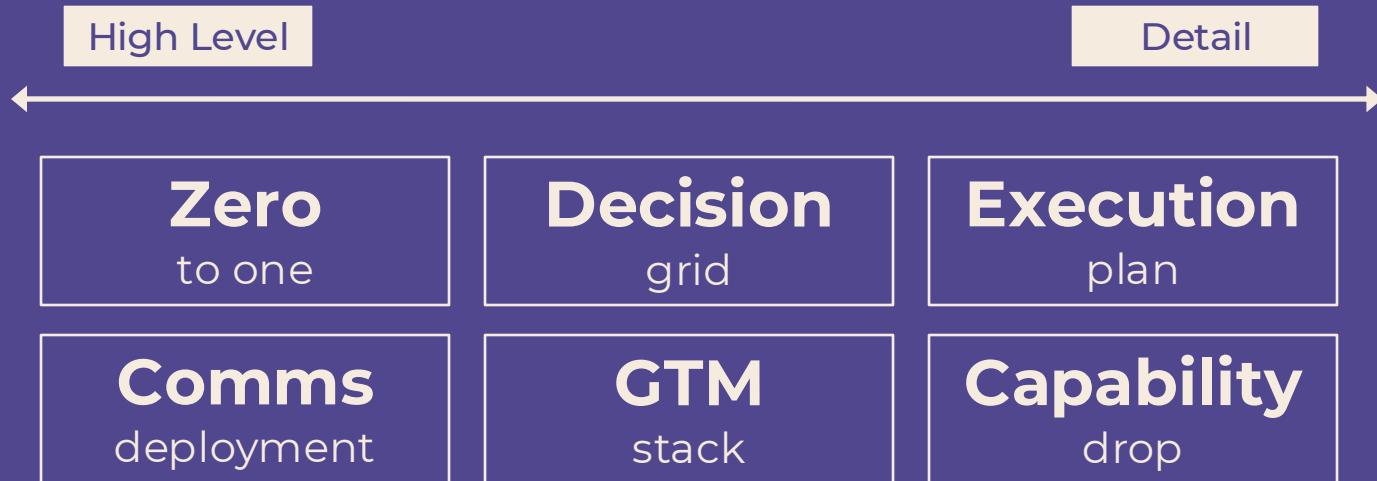
Bull – bear case scenarios is useful to present a set of possible scenarios so decision makers are clear on the upside and downside of a decision.

- Opportunity or gains in an optimistic "bull case" scenario
- Results if we extrapolate the trend forward in "base case"
- 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

## Implementation Plans



# Zero To One

Act

FRAMEWORK

+

INSTRUCTIONS

## Getting from start line to launch

Design

Mobilise

Build

Launch

Scale

- Describe the **design detail** required to transition from strategy mode to build mode

- Describe the steps to mobilise the **teams and working group** responsible for implementation

- Describe the setup of the **build teams** that will develop the solution and the delivery model they will adopt

- Describe the **launch plan and GTM approach** for the launch of the initiative or product

- Describe the **transition plan** to regular operations (business as usual) and how to expand to future phases

Outcome

Outcome

Outcome

Outcome

Outcome

[Key Milestones]

[Key Milestones]

[Key Milestones]

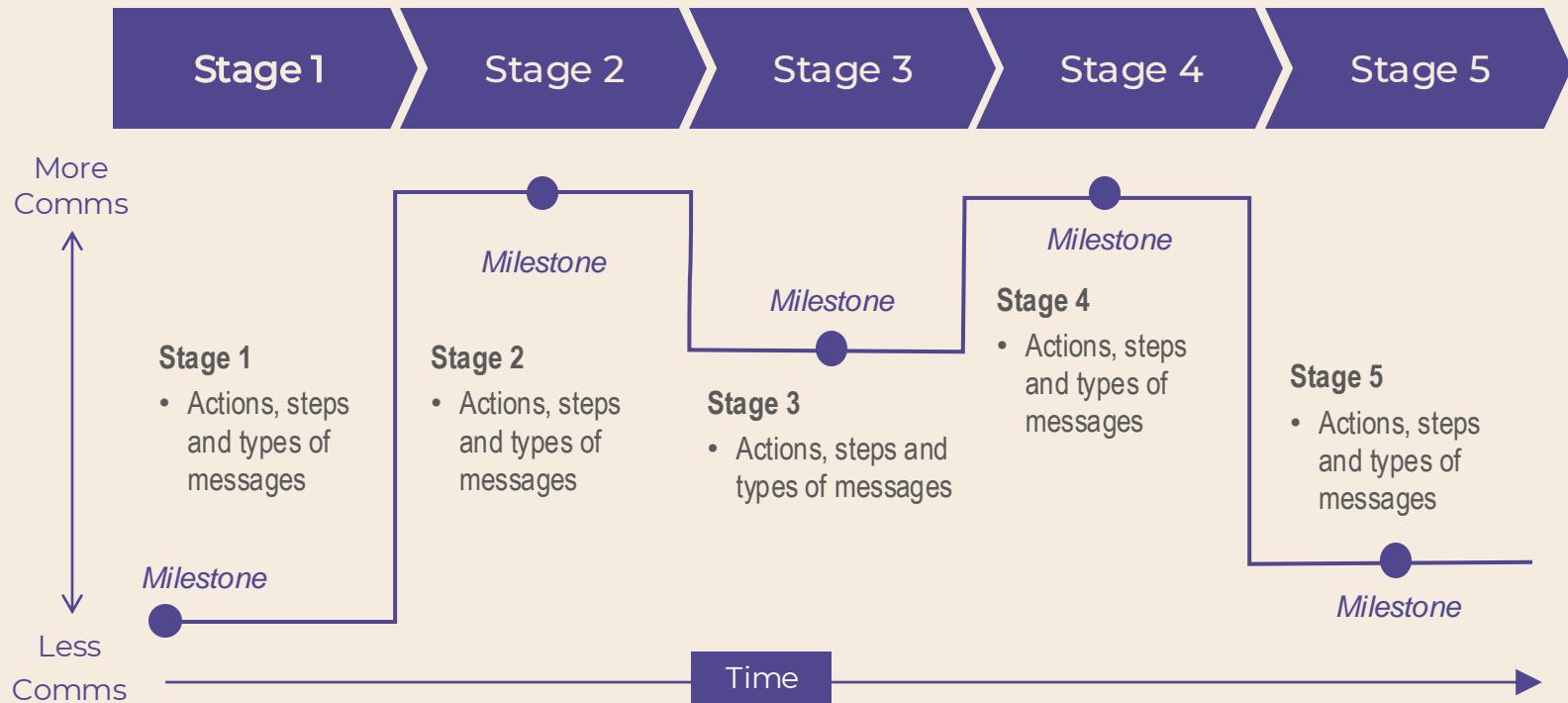
[Key Milestones]

[Key Milestones]

# Comms Deploy

Act

## Communications deployment plan



# Comms Deploy

Act

## Communications deployment plan

Comm types during each stage of execution, visualising intensity and key milestones for every stage

**1** Stage. Define the set of stages for the start to end of a deployment of a series of comms.

Stage 1

Stage 2

Stage 3

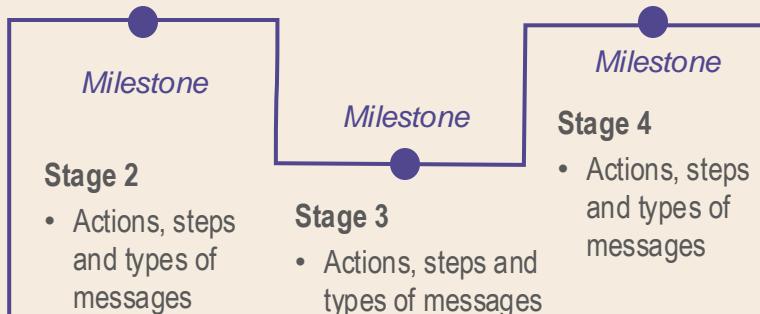
Stage 4

Stage 5

**2** Intensity. Visualise the level of intensity (illustratively) during each stage

1 on steps and types of messages

Milestone  
Less Comms



**3** Detail. Describe the comm action, steps or types of messages in each stage.

Stage 5

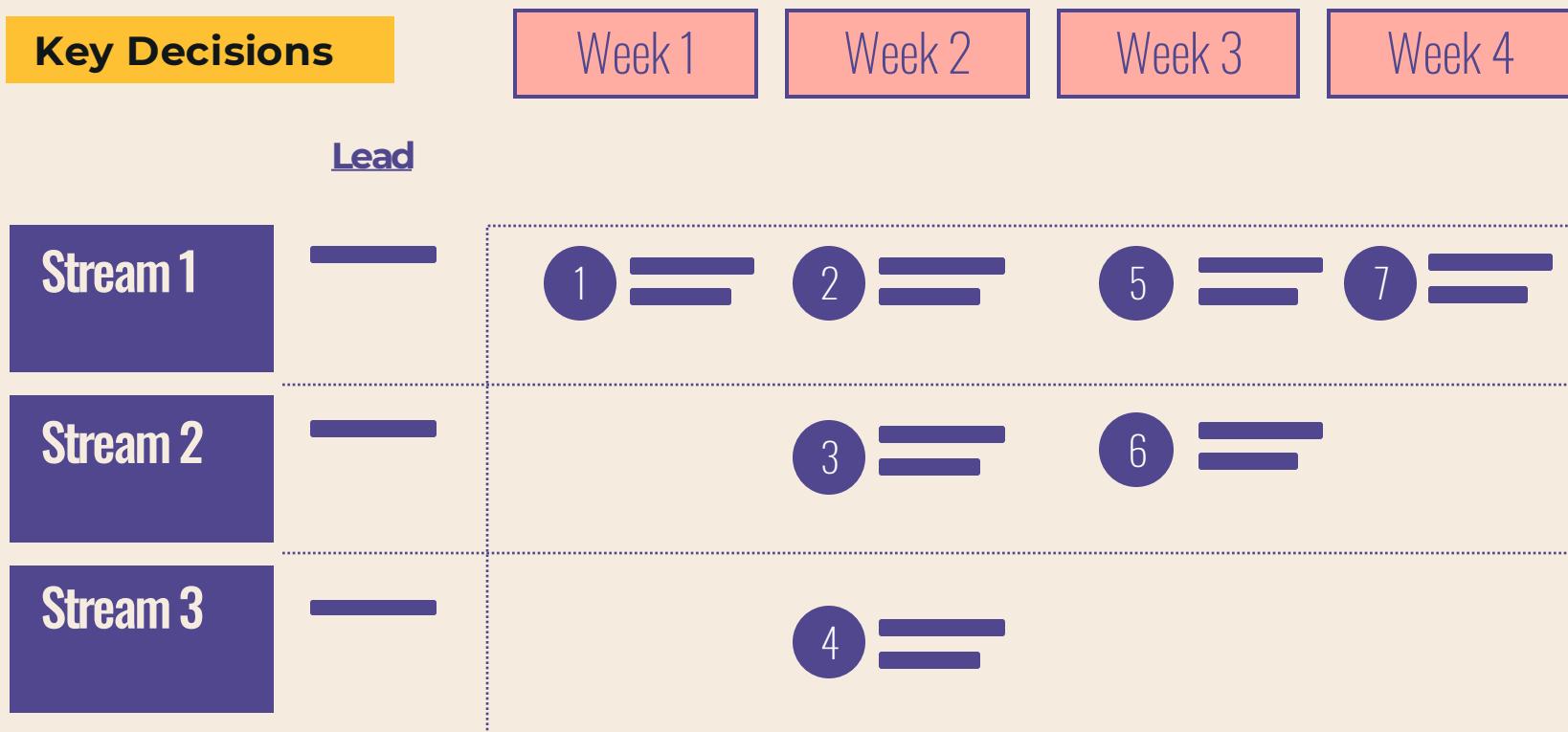
- Actions, steps and types of messages

Mile

**4** Milestone. Include any important milestone events that occur at each stage of the comms deployment.

# Decision Grid

Act



# Decision Grid

Act

INSTRUCTIONS

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

1 =

2 =

5 = 7 =

3 =

6 =

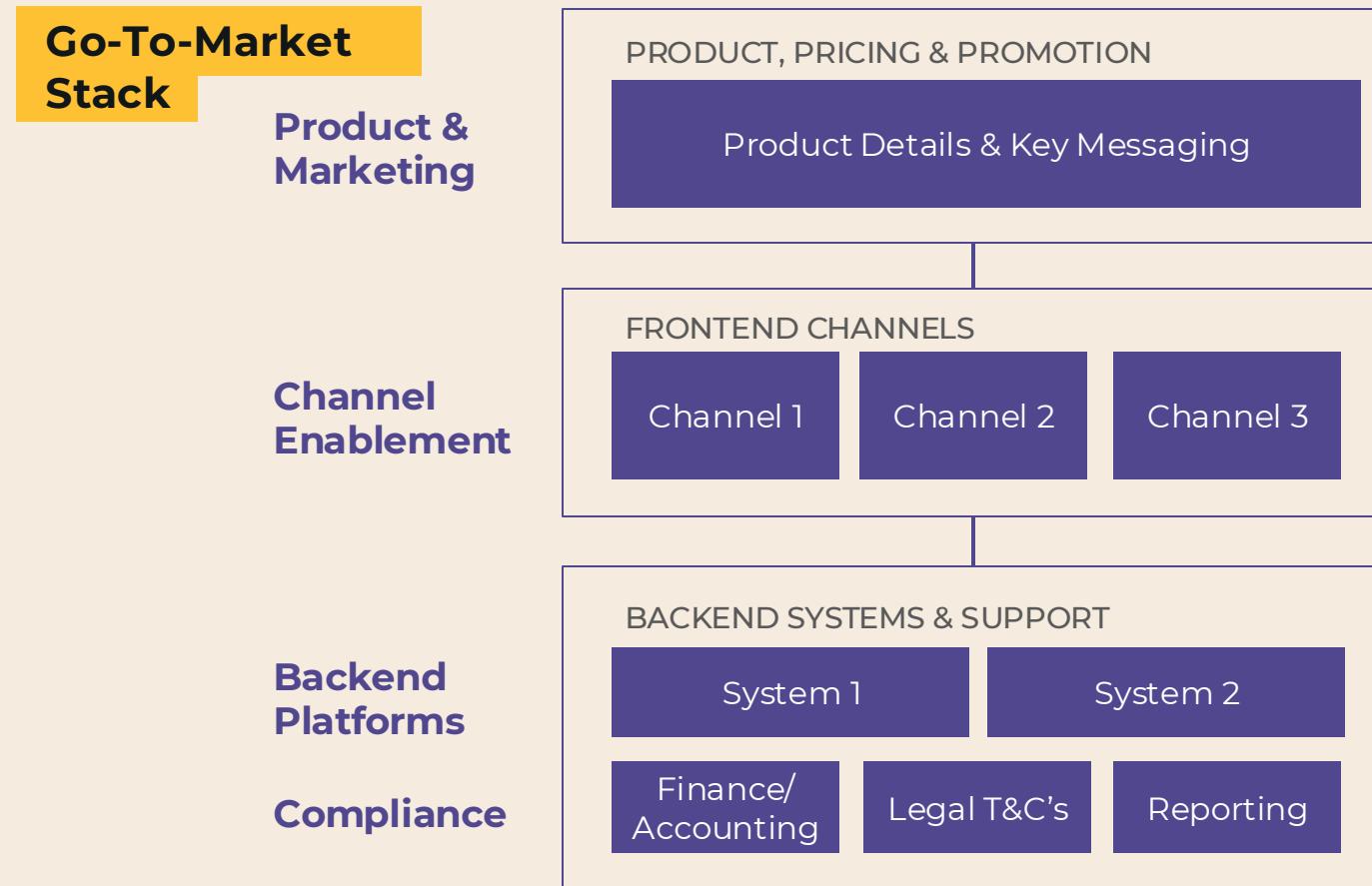
4 =

2

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

# GTM Stack

Act



# GTM Stack

Act

## Go-To-Market Stack

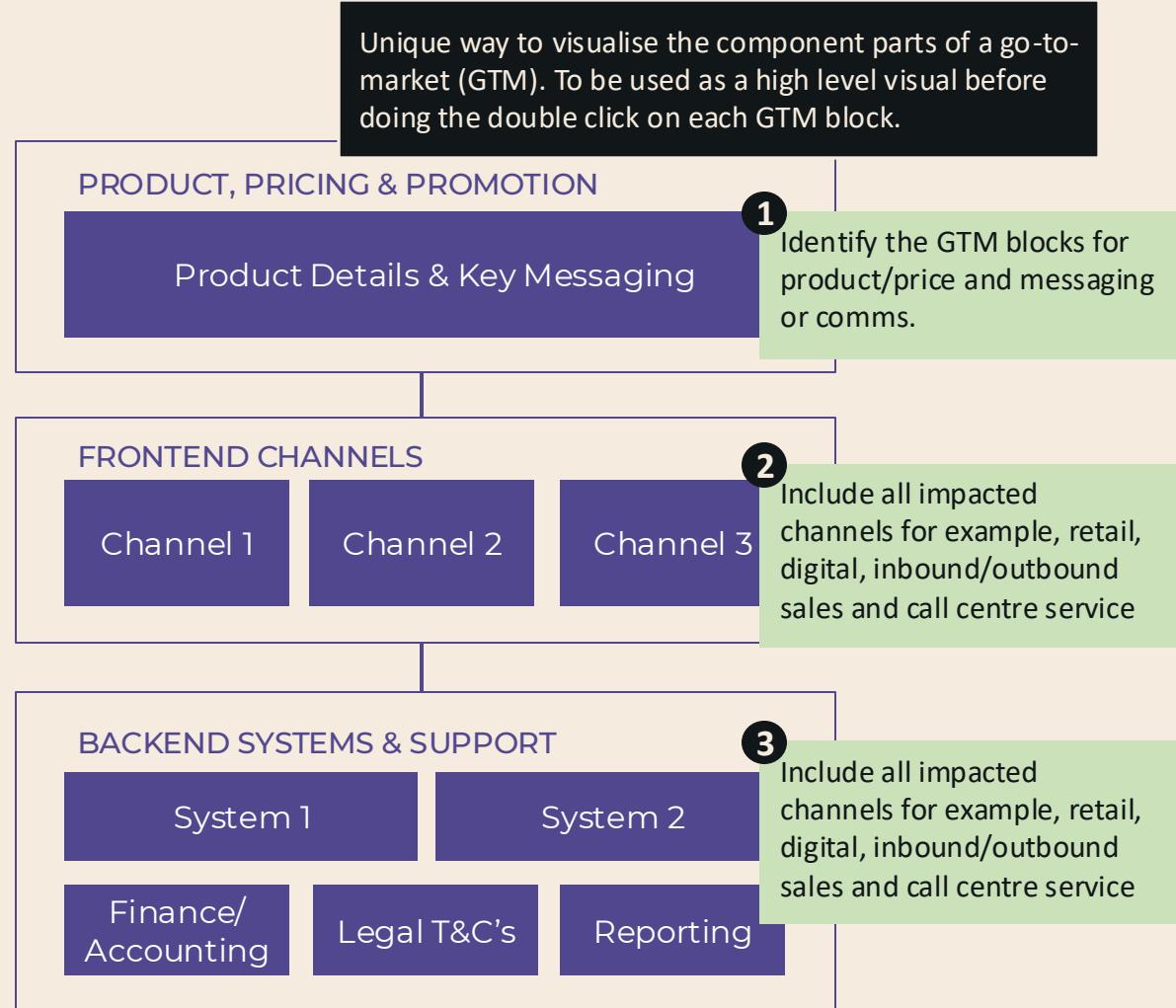
### Product & Marketing

### Channel Enablement

### Backend Platforms

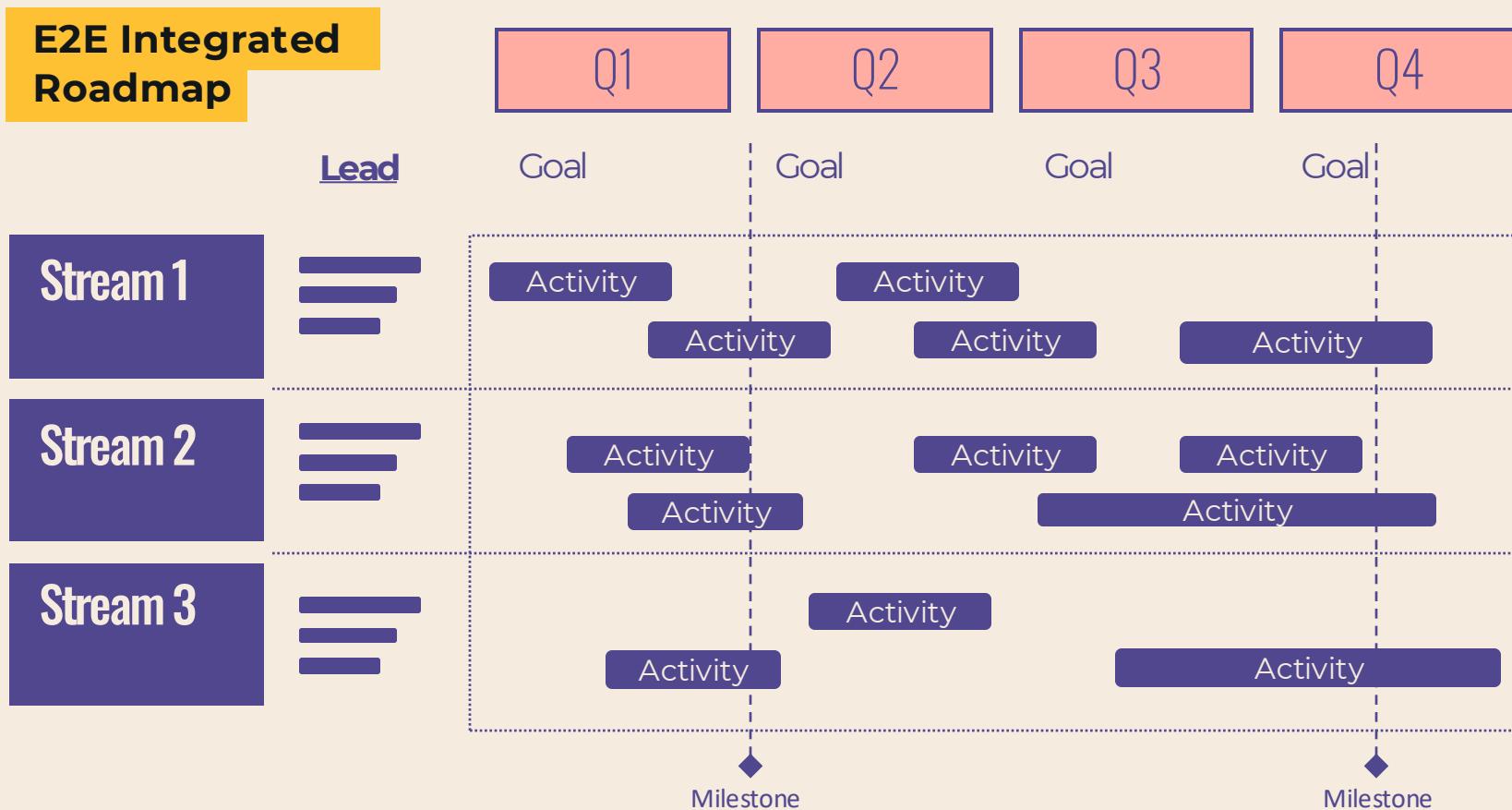
### Compliance

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

Act



# Execution Plan

INSTRUCTIONS

Act

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

## E2E Integrated Roadmap

Lead

**Stream 1**

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

**Stream 2**

**Stream 3**

Q1

Q2

Q3

Q4

Goal

Goal

Goal

Goal

Activity

Milestone

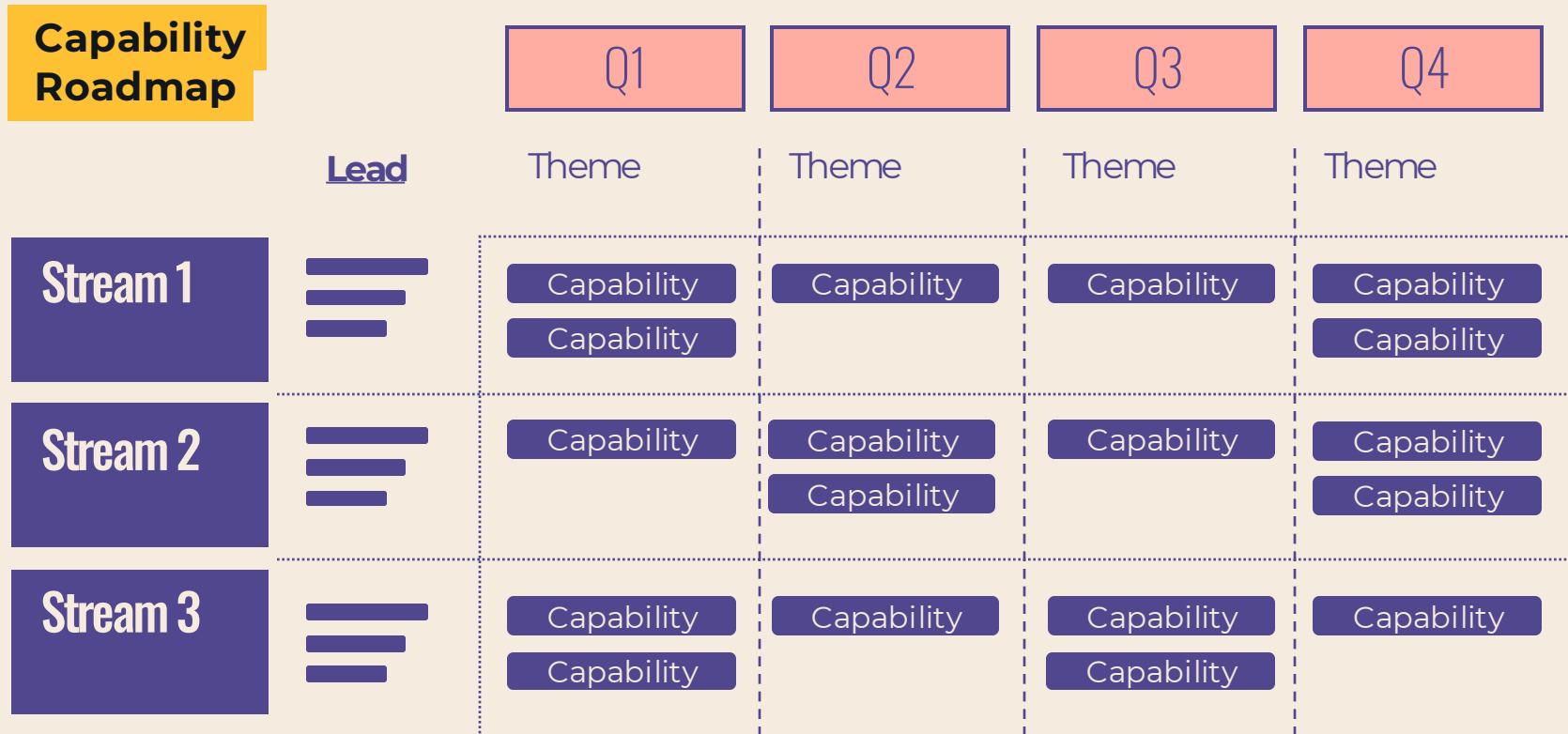
**2** Time. Chunk down the time blocks from start to launch, with goals for each phase.

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

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

# Capability Drop

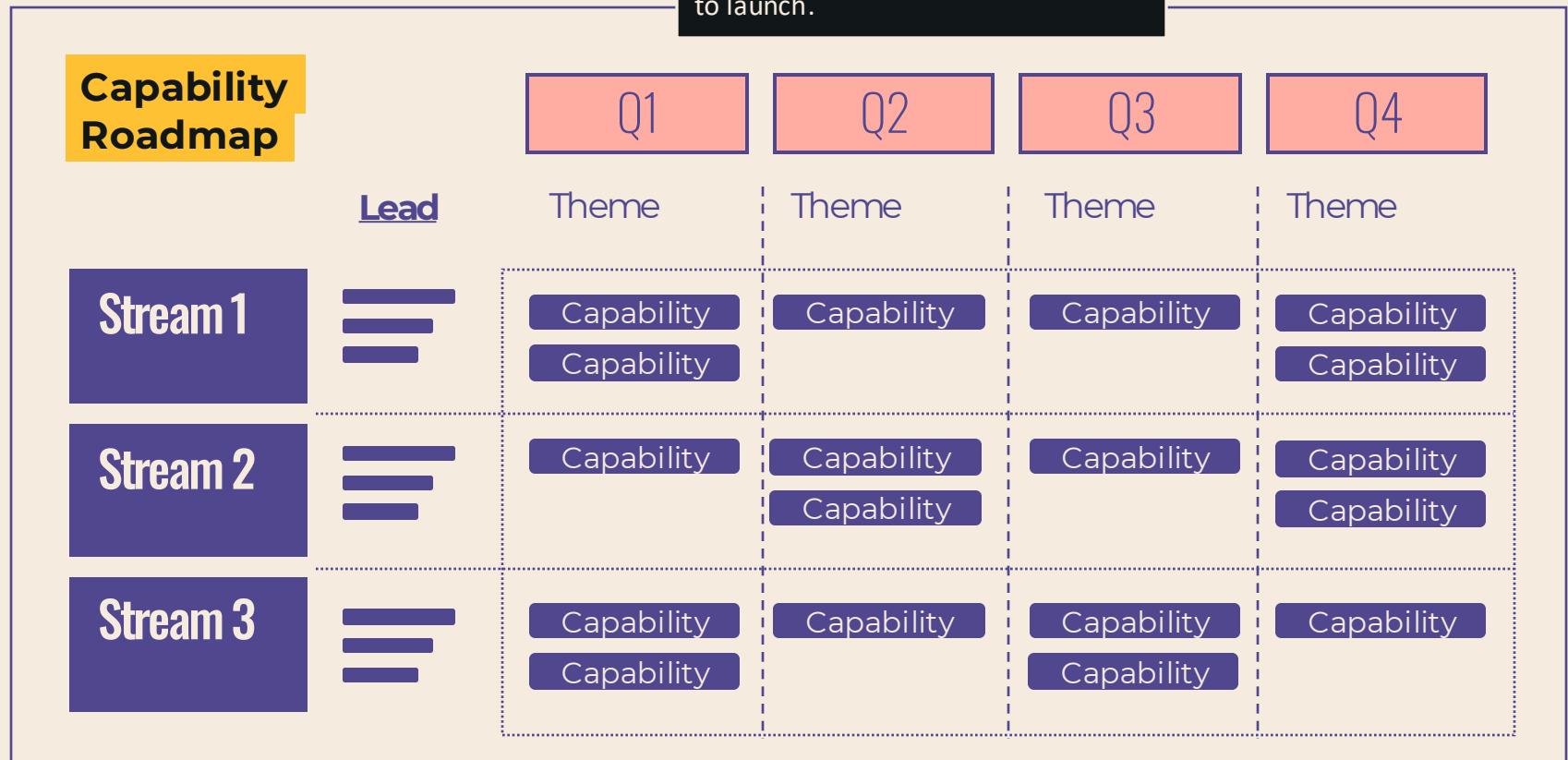
Act



# Capability Drop

Act

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



# THANK YOU!