

over night strat=gist

Strategist Toolkit

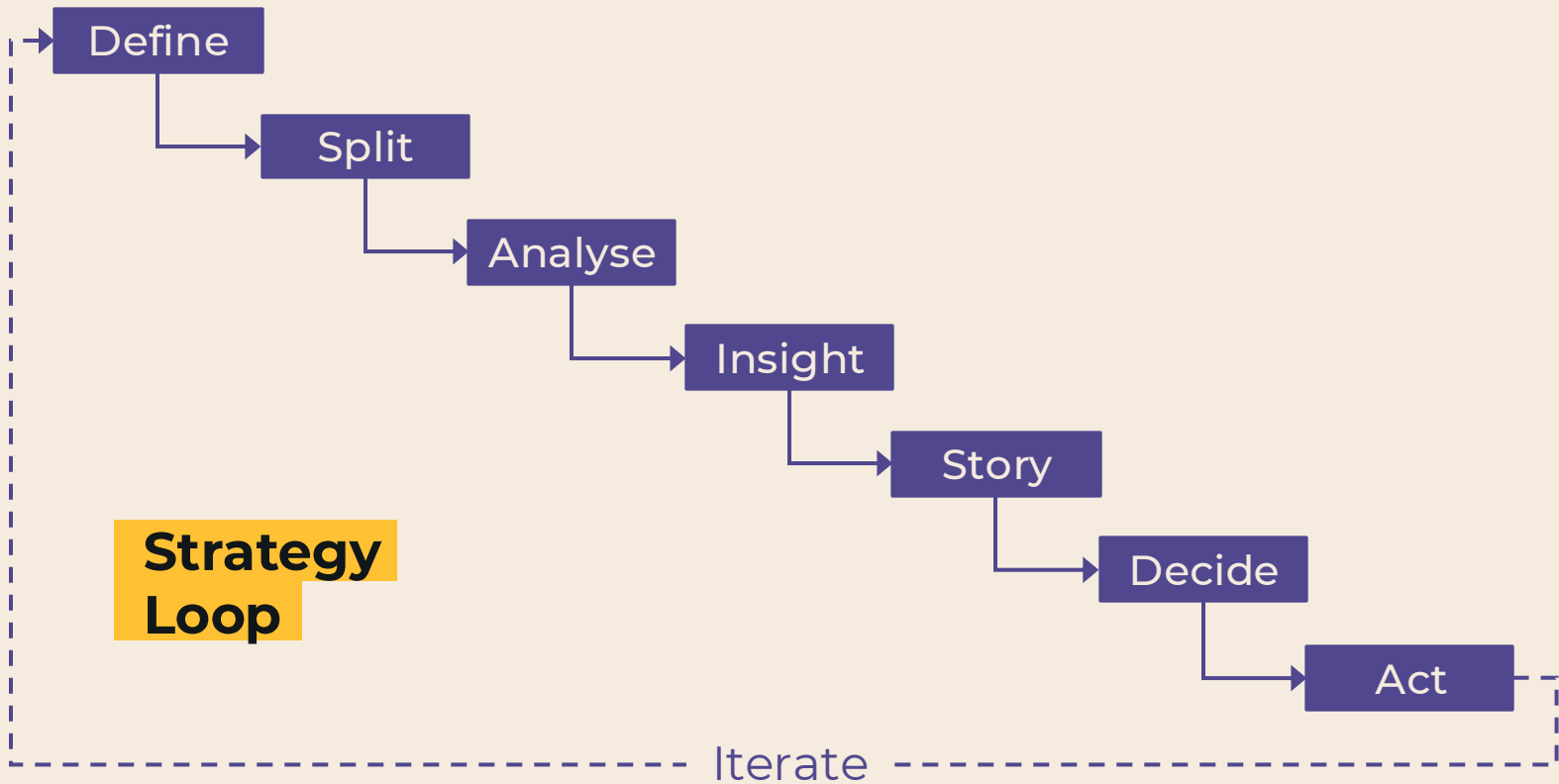
70 stylish, modern frameworks to help you
create your next strategy using a simple 7-
step strategic thinking model



Strategic Thinking

OVERNIGHT STRATEGIST

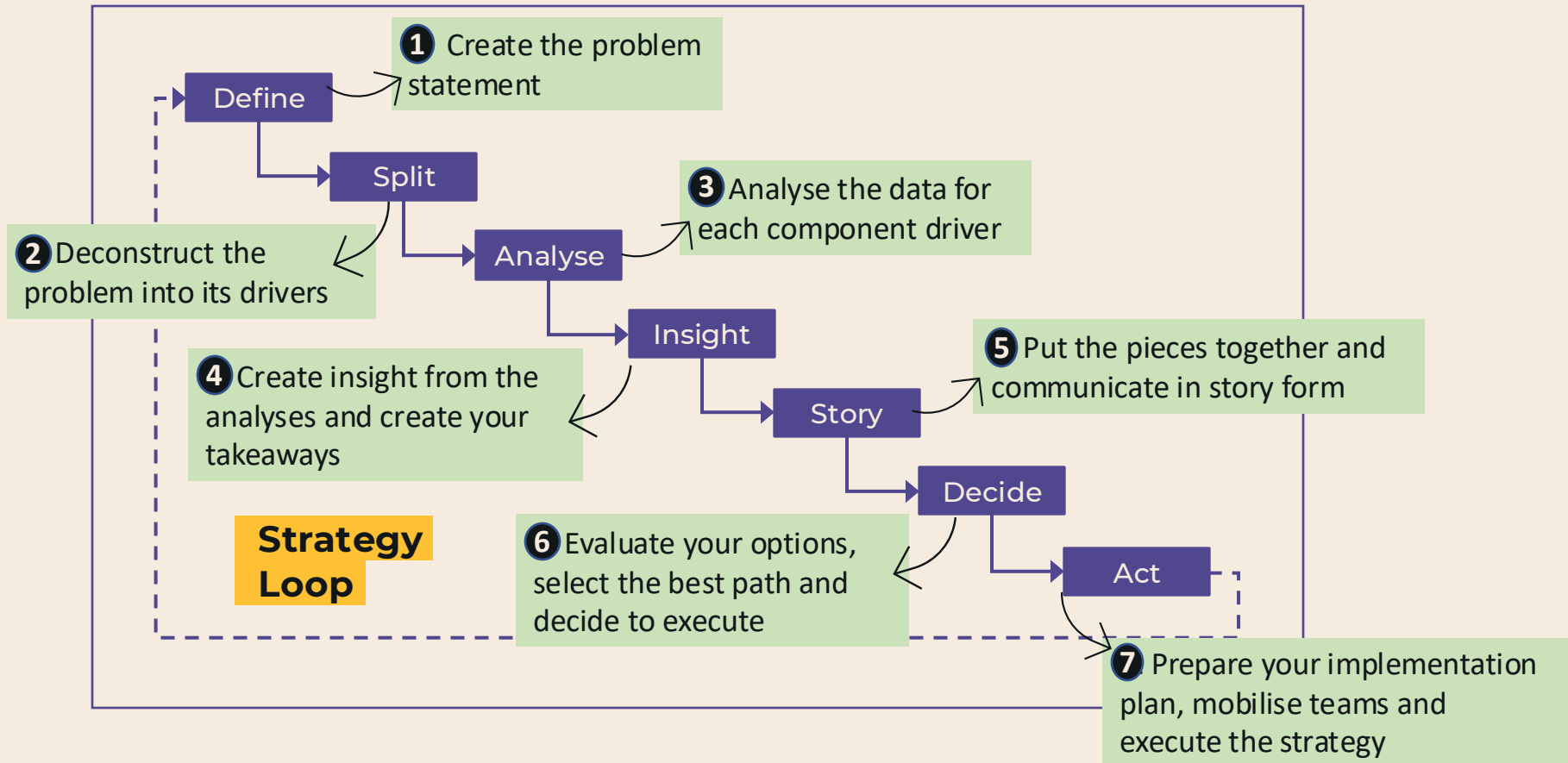
FRAMEWORK



Strategic Thinking

OVERNIGHT STRATEGIST

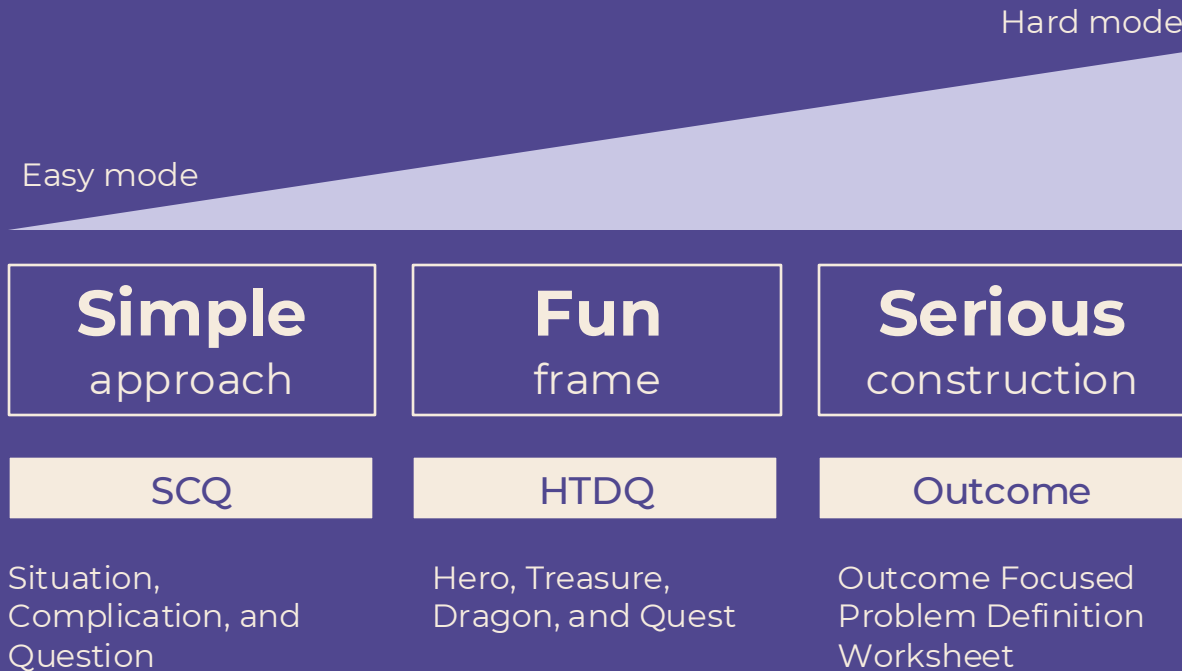
INSTRUCTIONS



Define

OVERNIGHT STRATEGIST

Problem Definition Frameworks

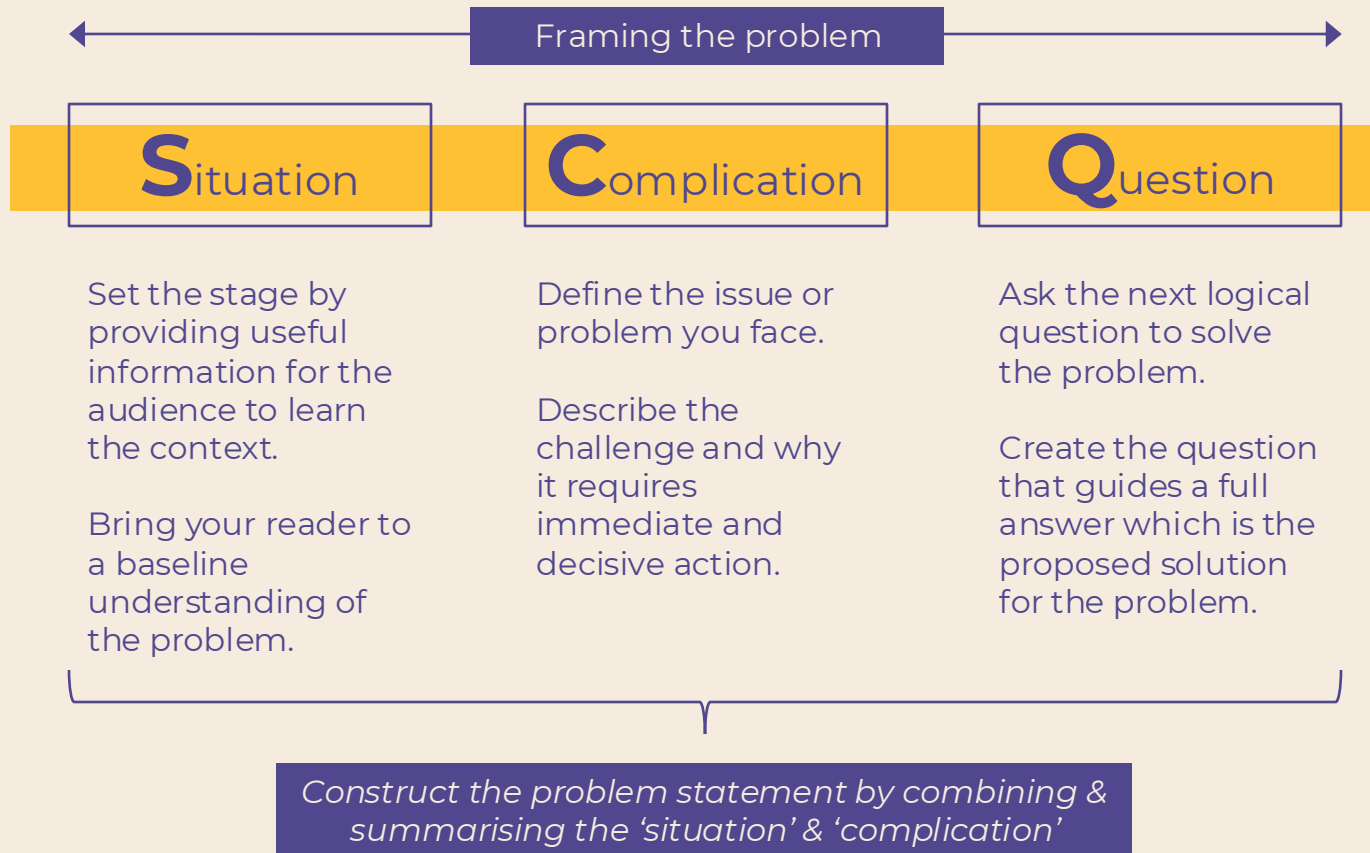


SCQ

DEFINE

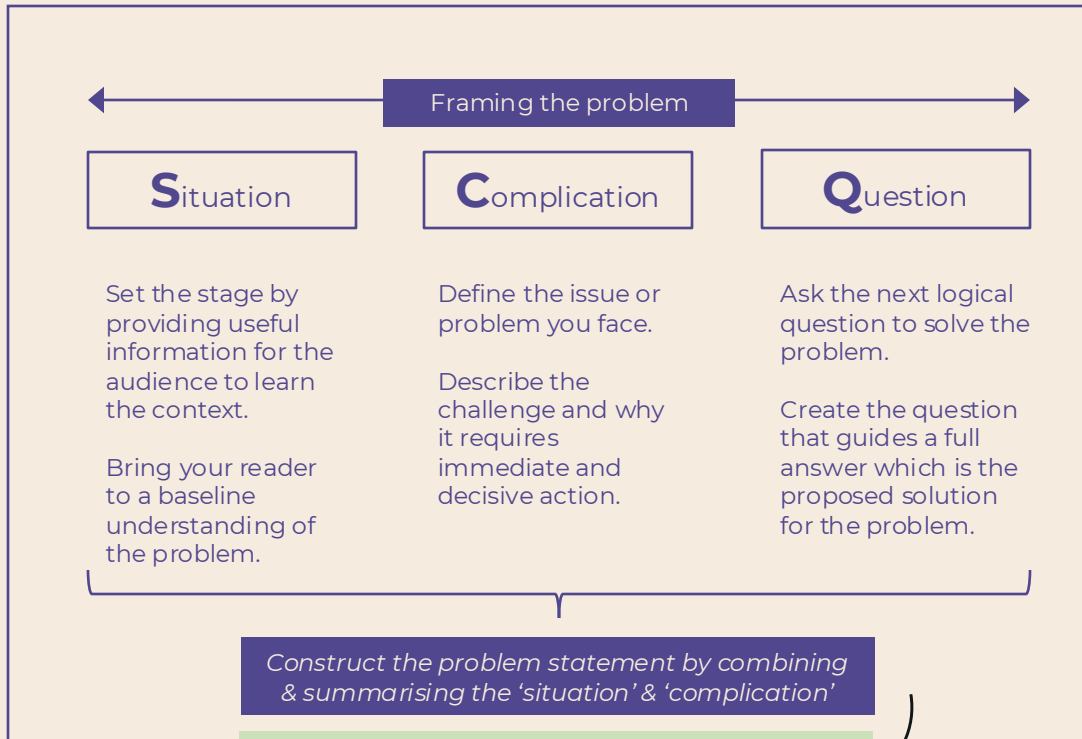
OVERNIGHT STRATEGIST

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

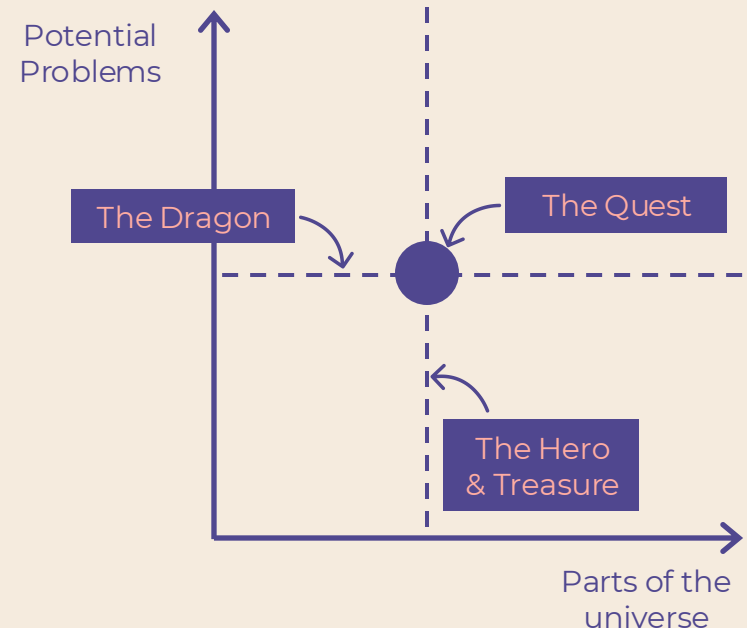
The hero's aspiration

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

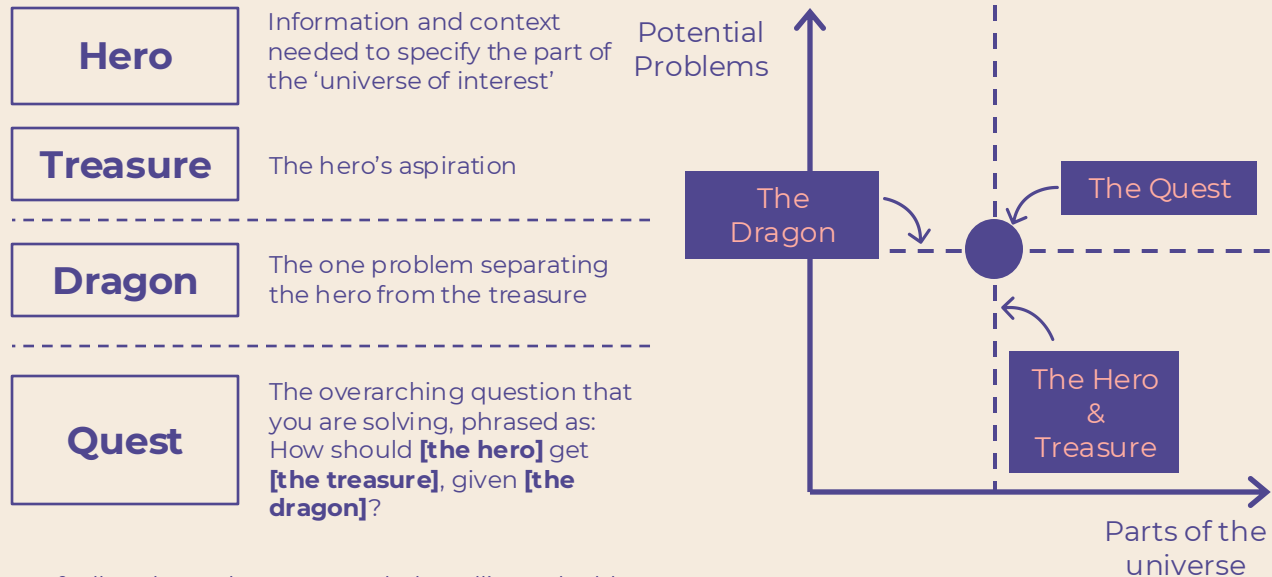
Example:
Not many really know Acme now offers learning courses.

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

OVERNIGHT STRATEGIST

FRAMEWORK

S Statement

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

Problem
Definition
Checklist



Decider

Decision maker. Who needs to decide or act?



Criteria

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



Forces

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



Timeframe

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



Constraints

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



Accuracy

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



Decider

Decision maker. Who needs to decide or act?



Criteria

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



Forces

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Accuracy

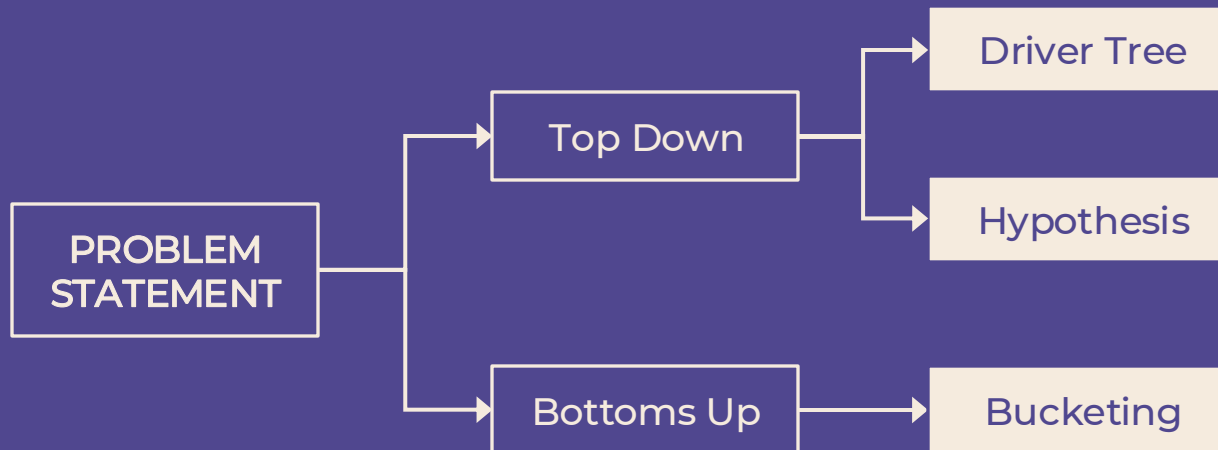
Accuracy necessary. What level of accuracy is needed?

Source: McLean, Bulletproof Problem Solving, Problem Definition Worksheet

Construct the "Problem Definition Worksheet" using these components.

Split

Methods to Break Down Problems

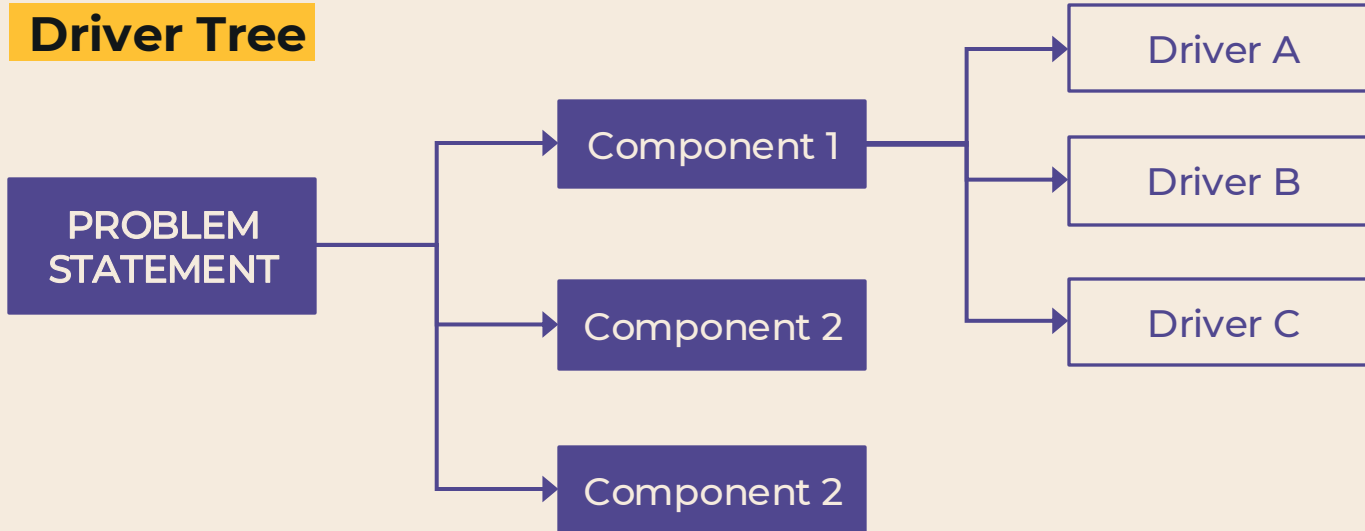


Driver Tree

SPLIT

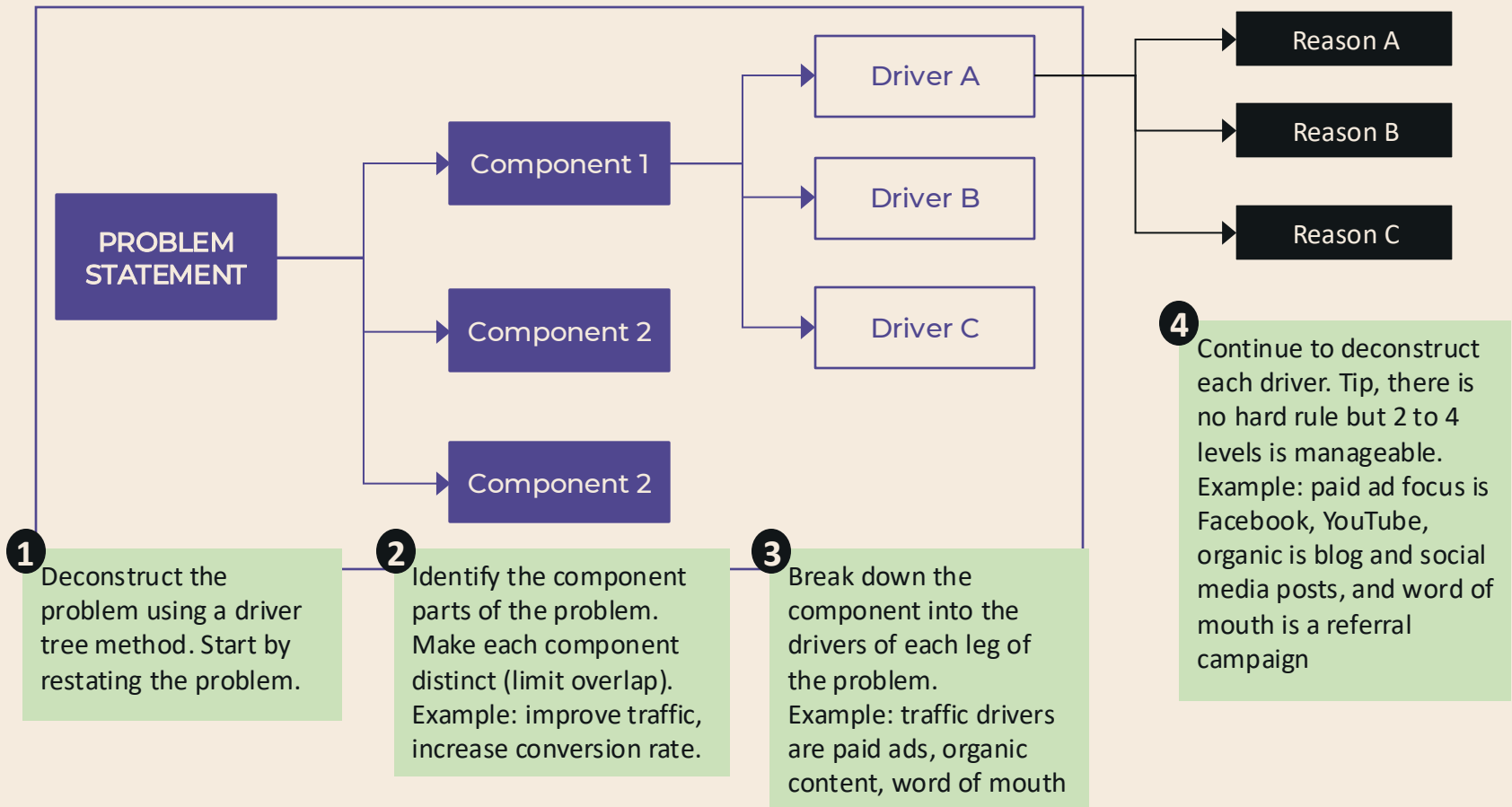
OVERNIGHT STRATEGIST

FRAMEWORK



Driver Tree

SPLIT



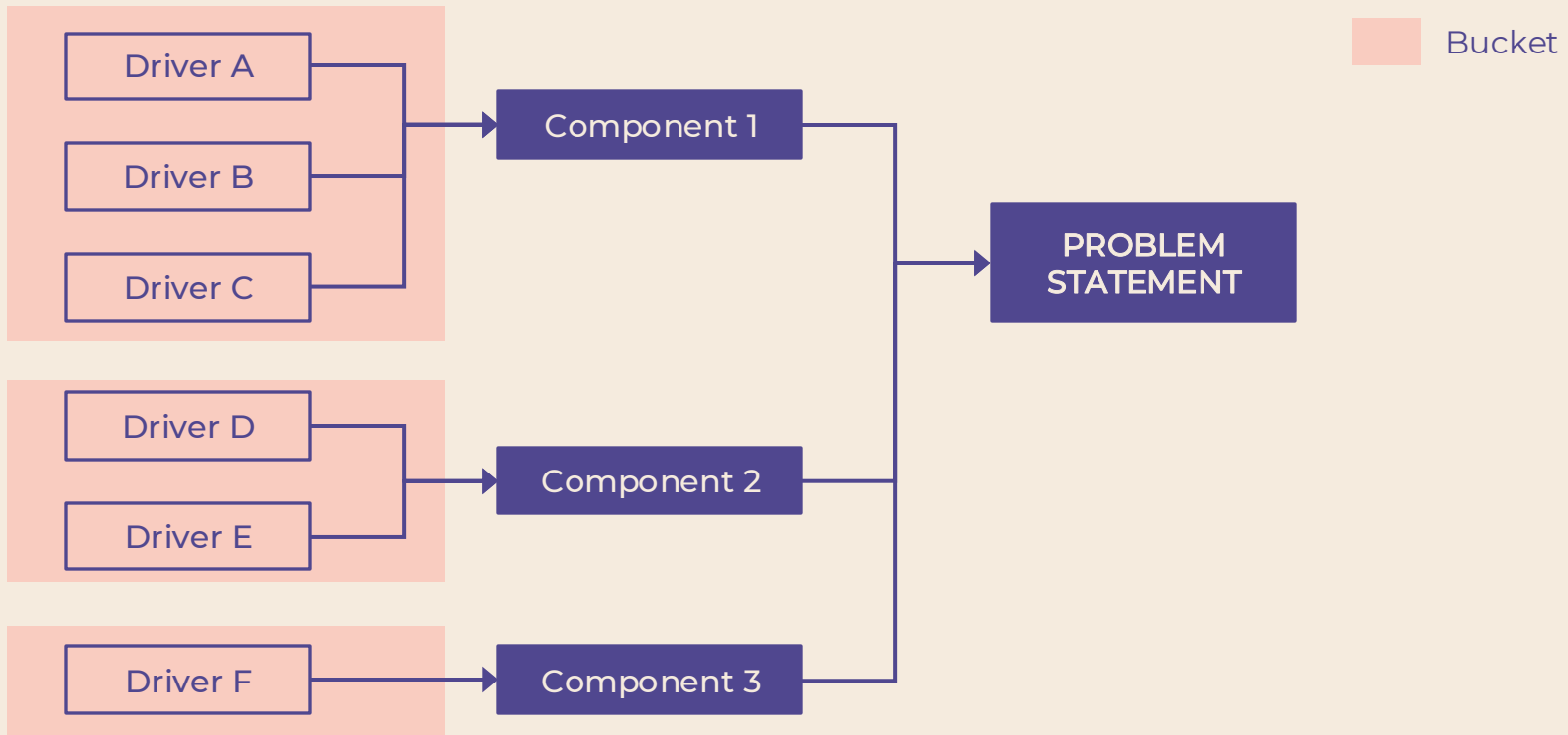
Bucketing

SPLIT

OVERNIGHT STRATEGIST

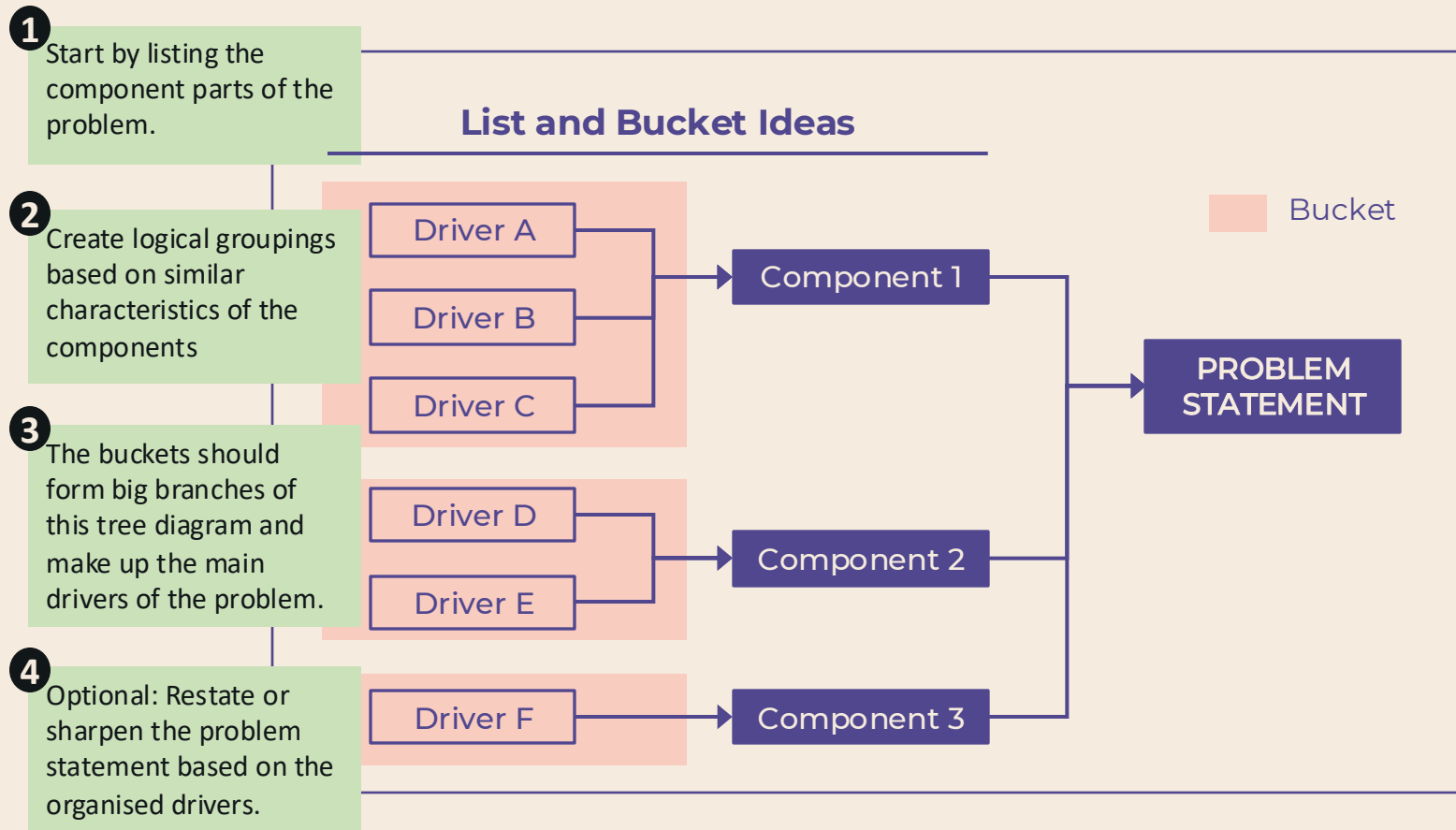
FRAMEWORK

List and Bucket Ideas



Bucketing

SPLIT



Hypothesis

SPLIT

OVERNIGHT STRATEGIST

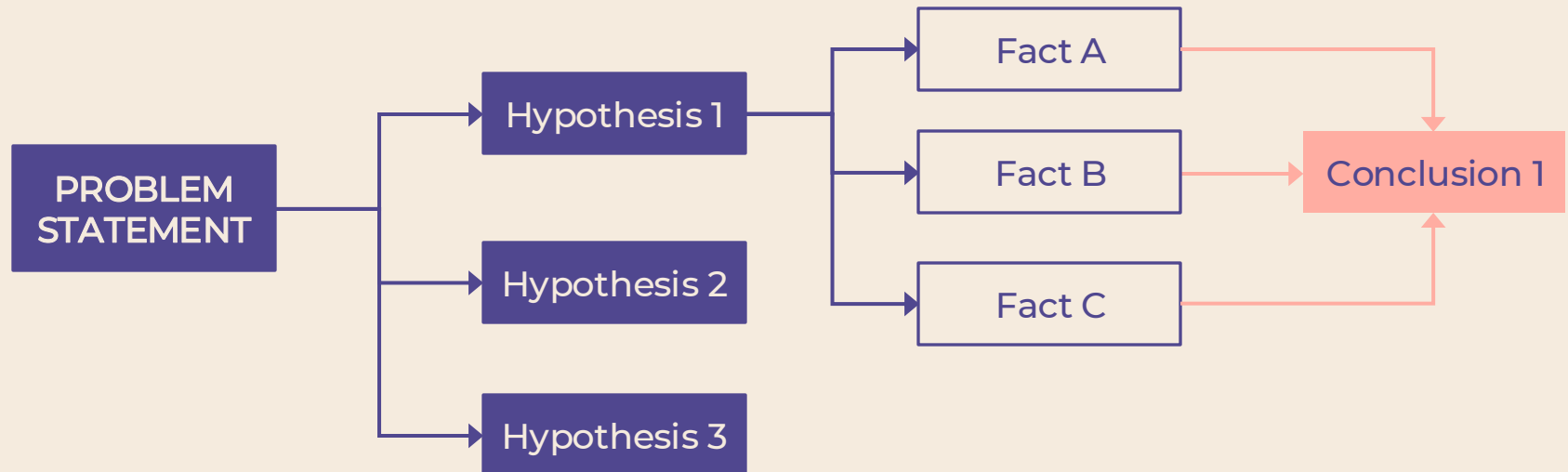
FRAMEWORK

Hypothesis Tree

List of
Hypotheses

Facts from
Investigation

Prove or Disprove
Hypothesis

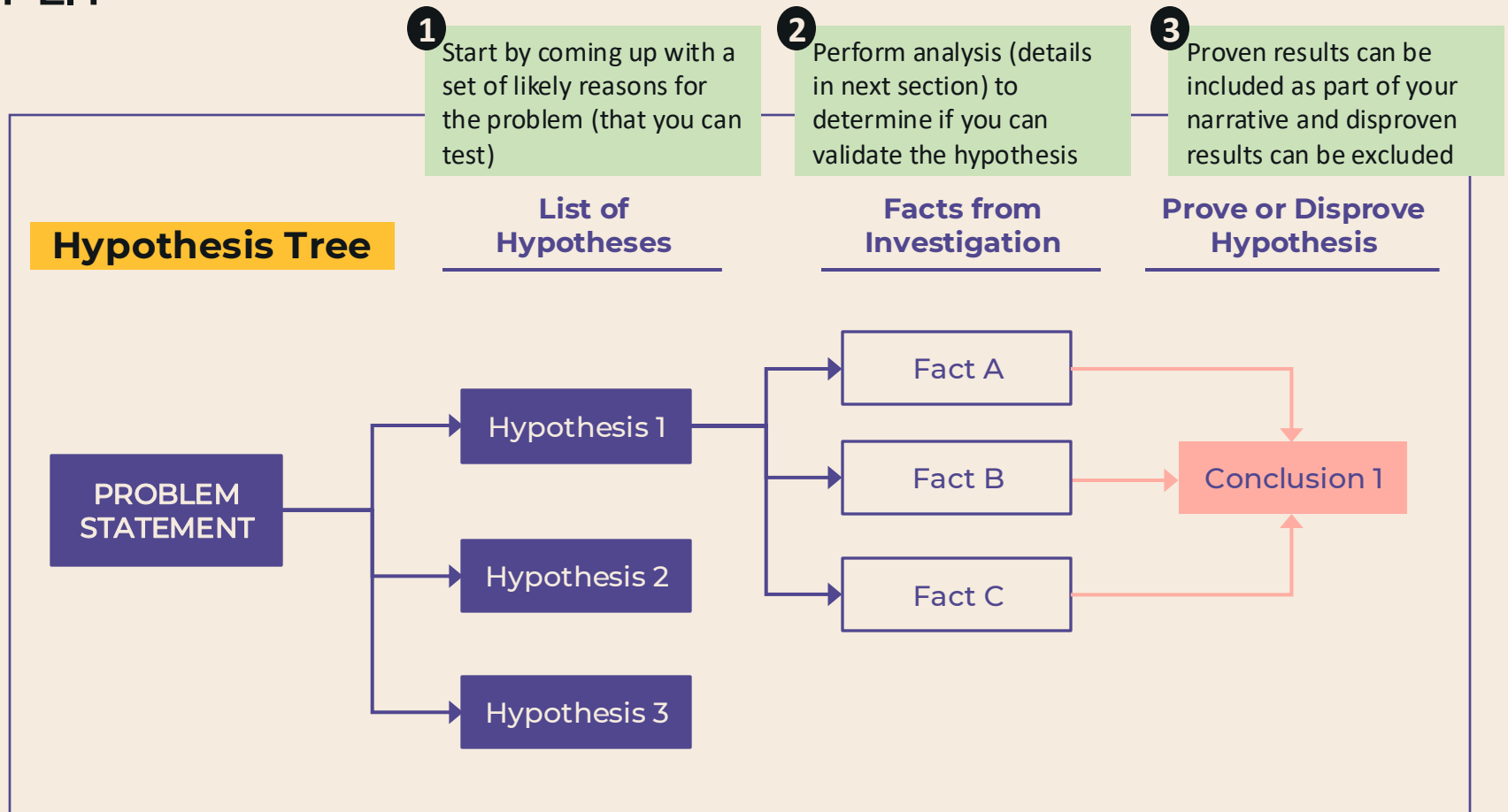


Hypothesis

SPLIT

OVERNIGHT STRATEGIST

INSTRUCTIONS



Analyse

← Quantitative → ← Qualitative →

Data analysis	Financial analysis	Question 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

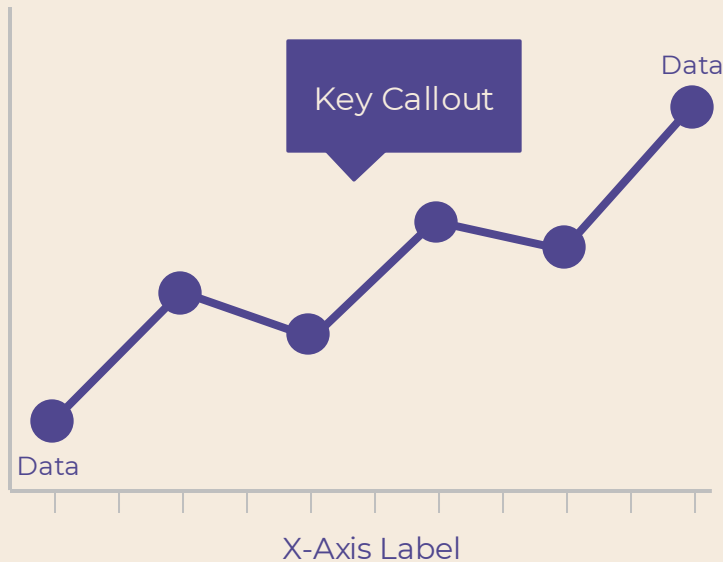
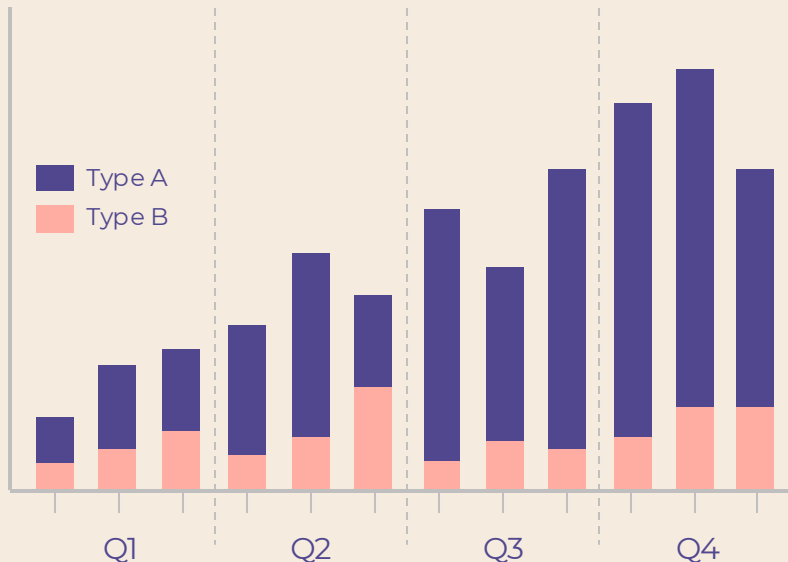


Chart Title
units



Trend

ANALYSE

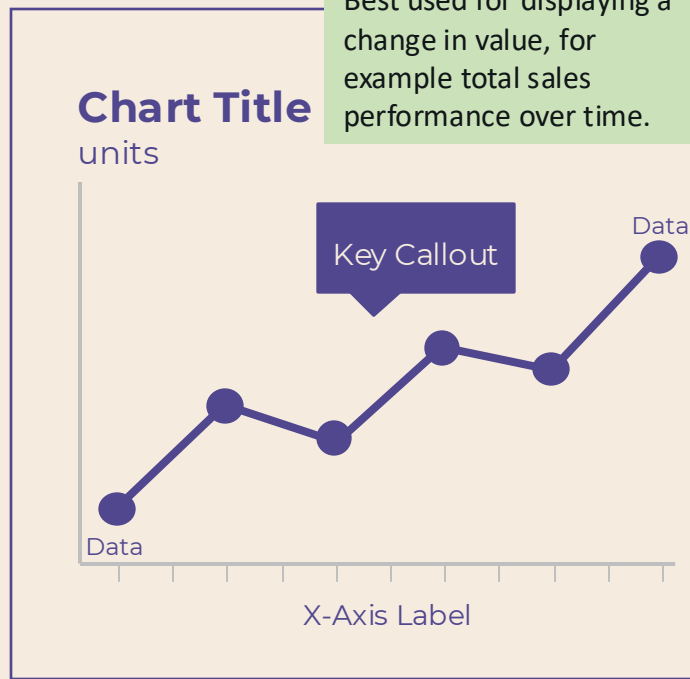
OVERNIGHT STRATEGIST

INSTRUCTIONS

1

Line chart:

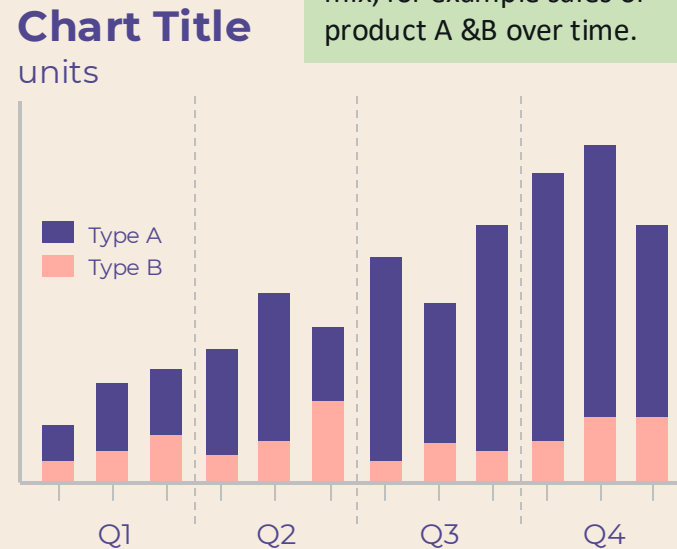
Best used for displaying a change in value, for example total sales performance over time.



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

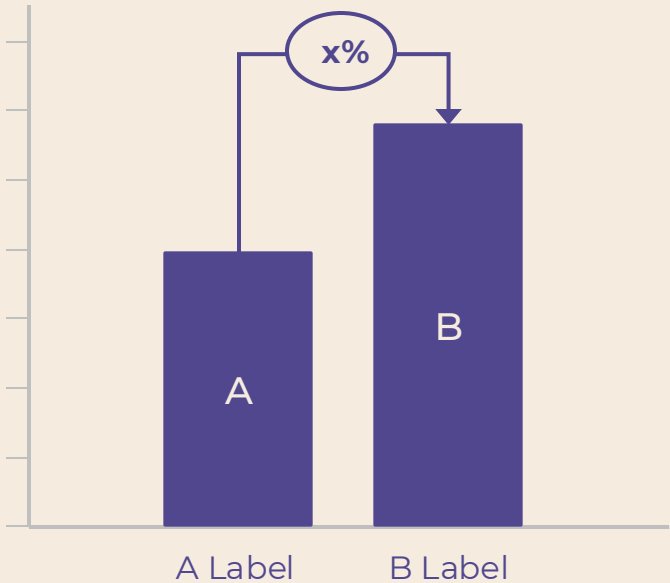
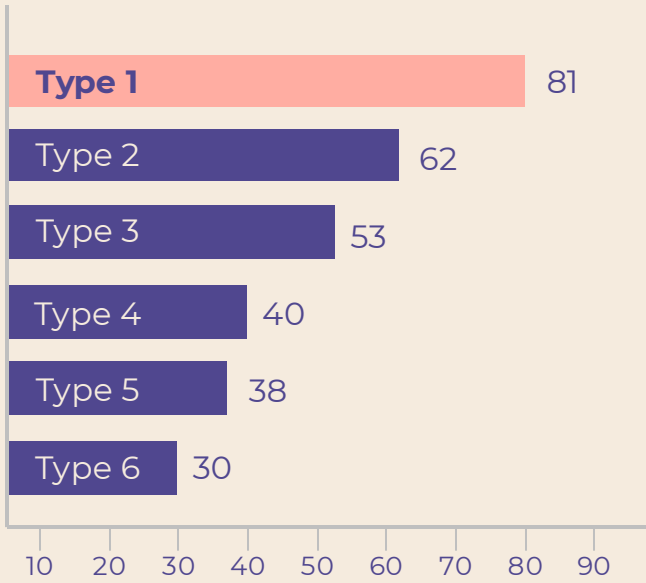


Chart Title

units



Comparison

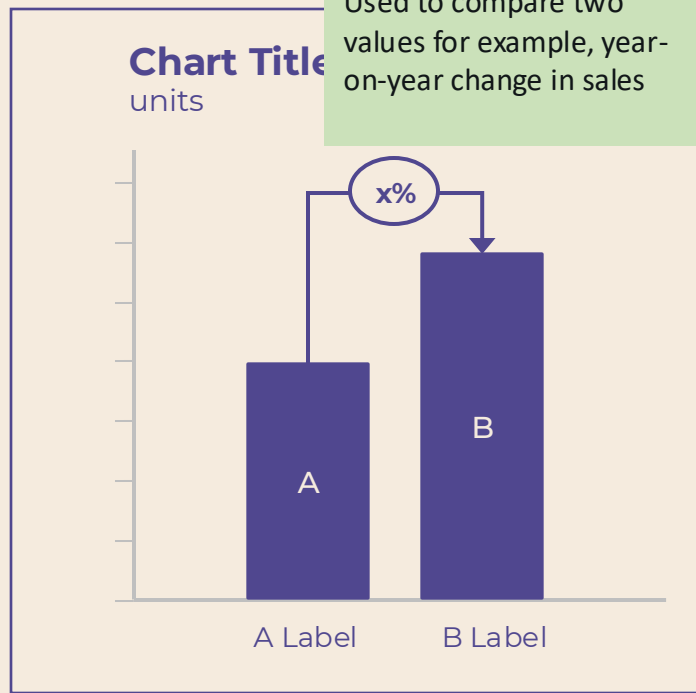
ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS

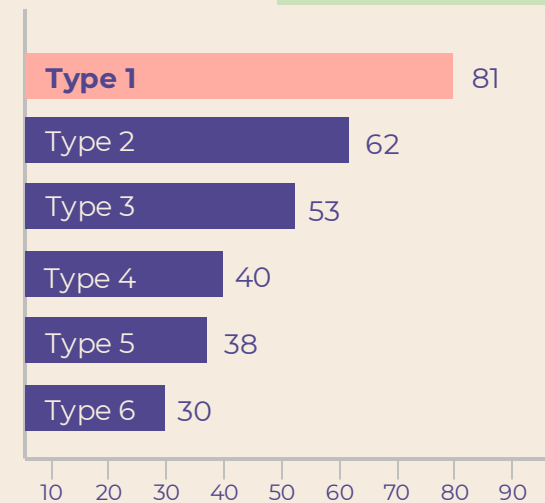
1 Vertical bar chart:

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.

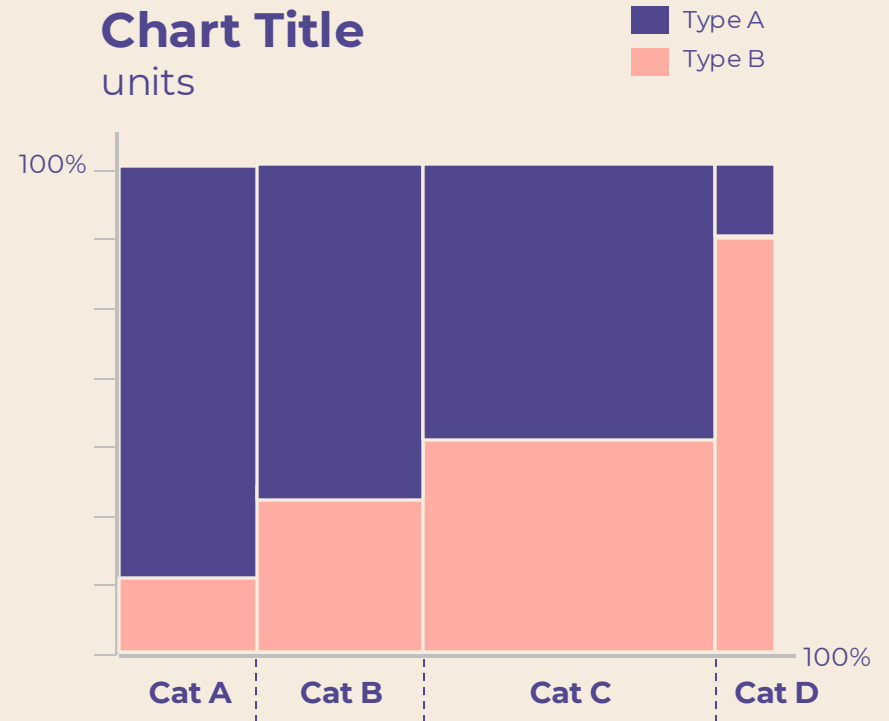
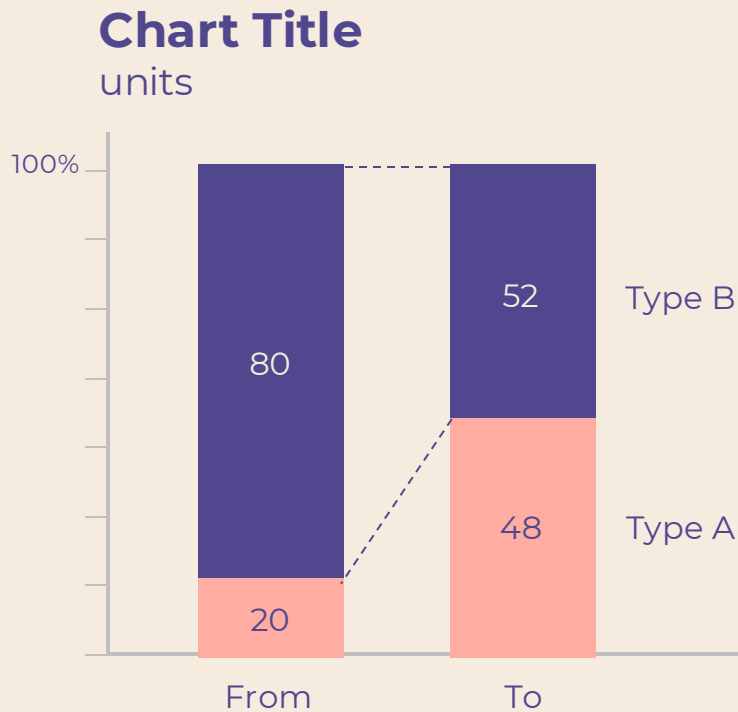


Mix

ANALYSE

OVERNIGHT STRATEGIST

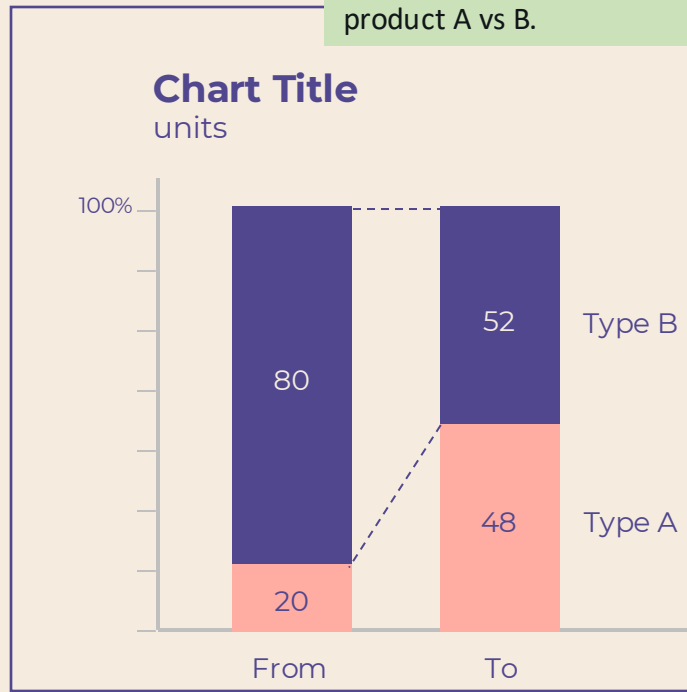
FRAMEWORK



Mix ANALYSE

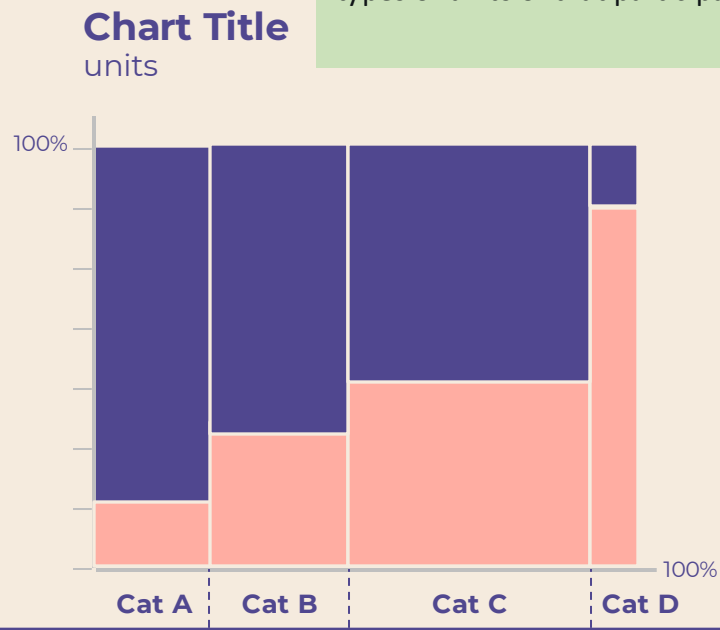
1 Stacked bar chart:

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

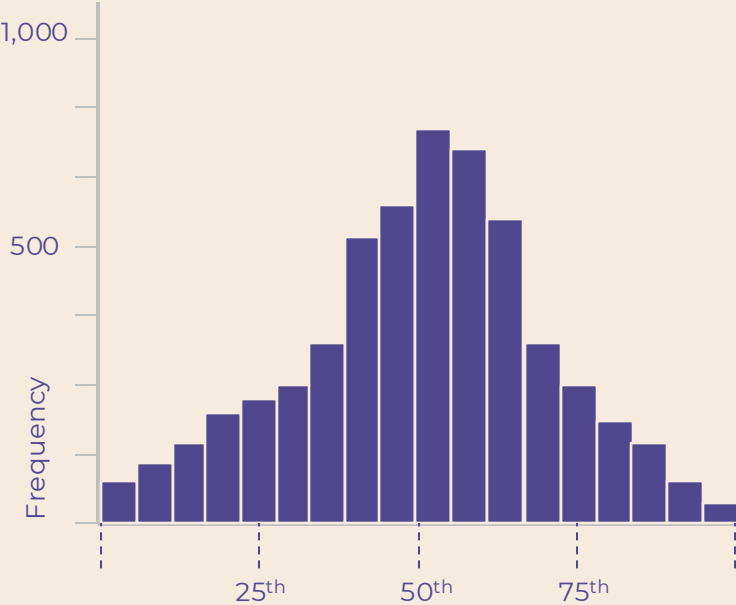
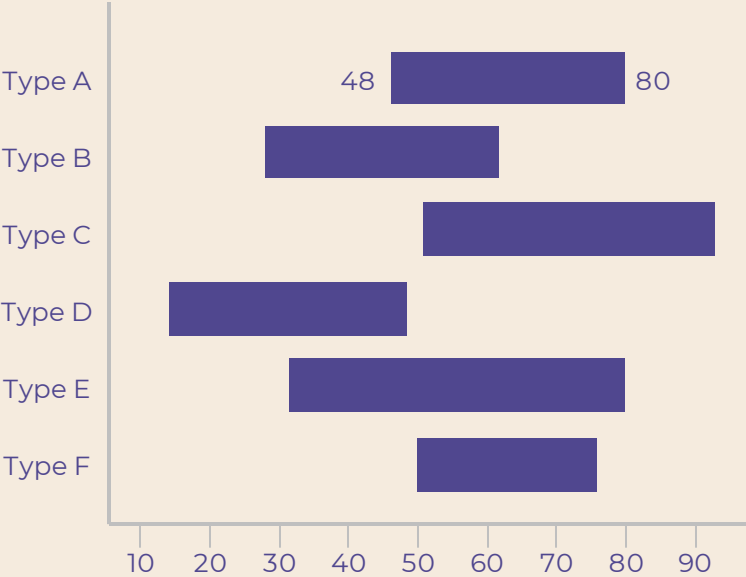


Chart Title

units



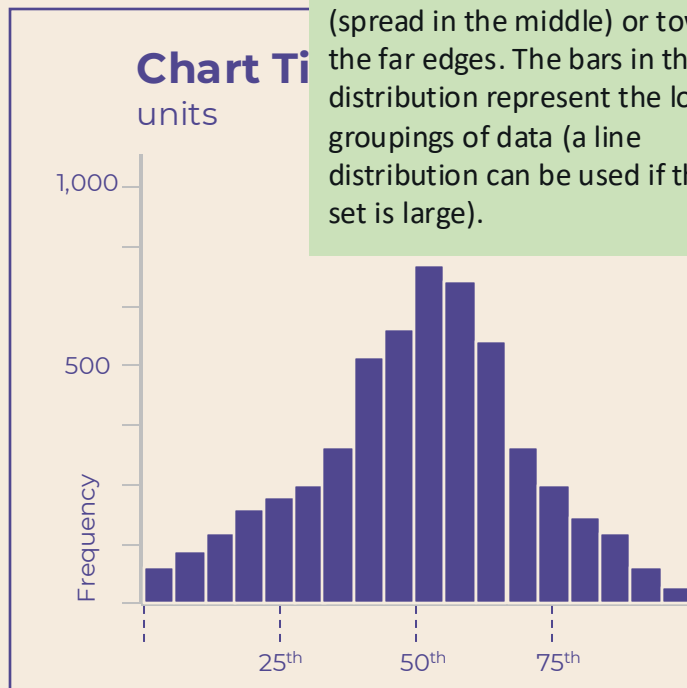
Distribution

ANALYSE

1

Distribution bar chart

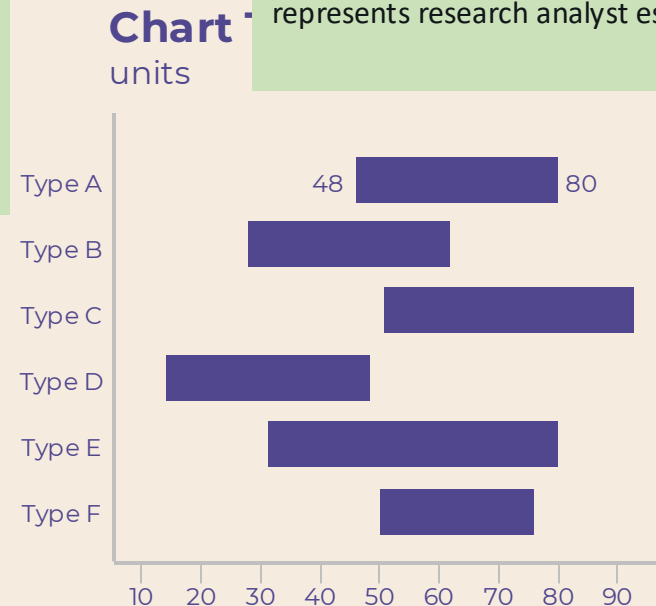
Used when you want to show how data is 'spread out', for example as a normal distribution or bell curve (spread in the middle) or towards the far edges. The bars in the distribution represent the logical groupings of data (a line distribution can be used if the data set is large).



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.

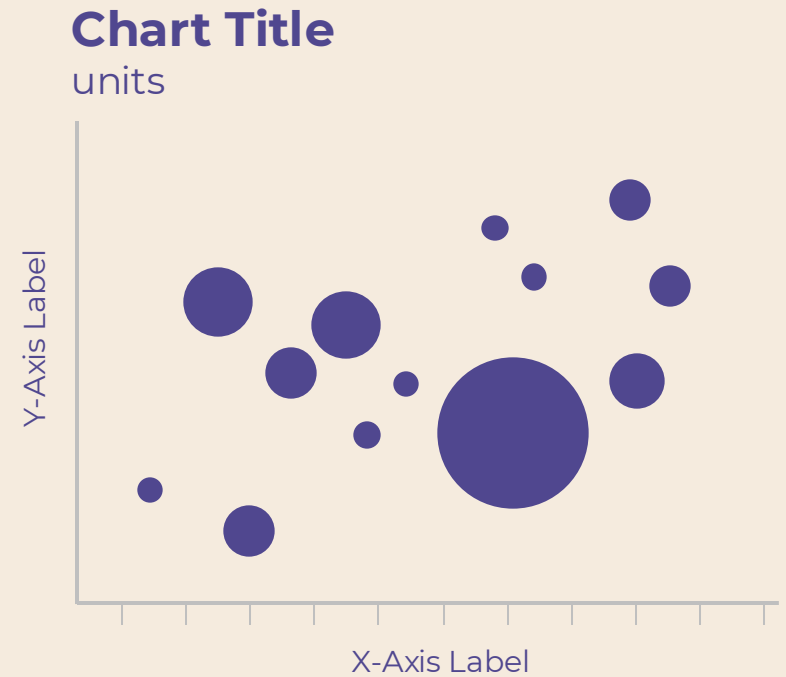
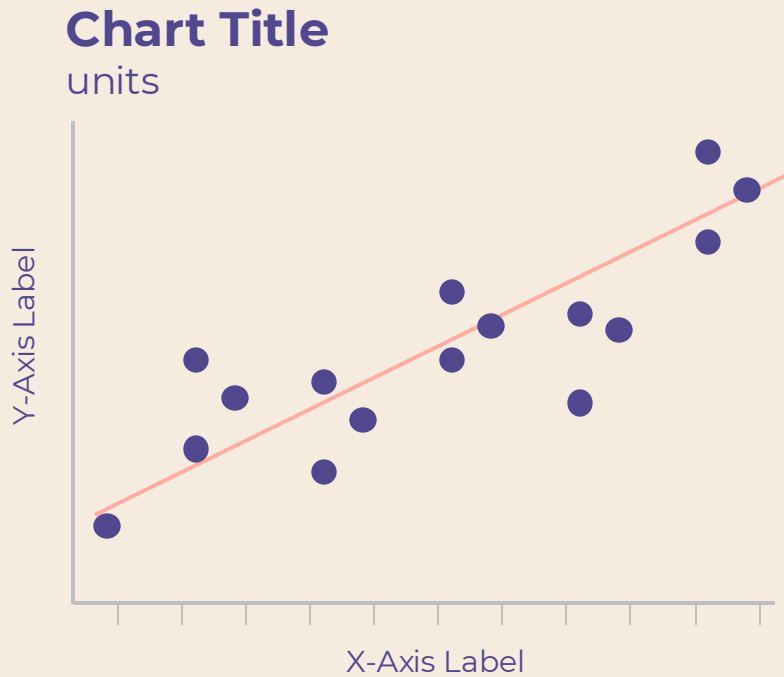


Scatter

ANALYSE

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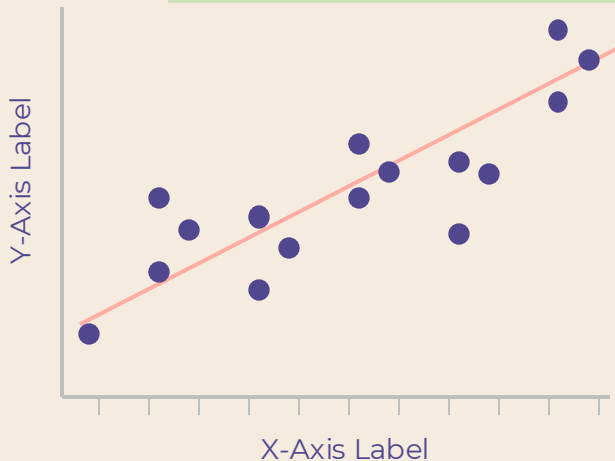


Scatter

ANALYSE

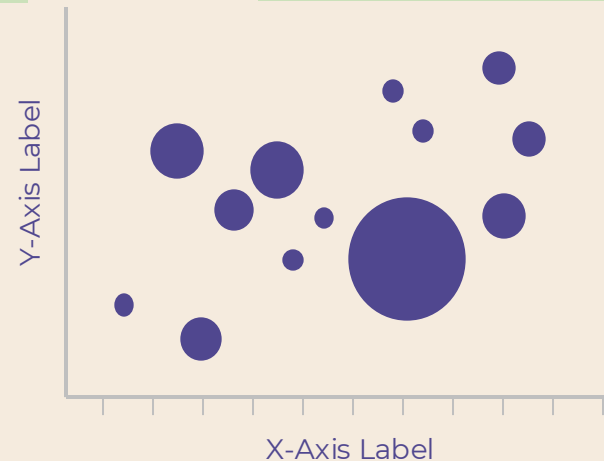
Scatter dot chart

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

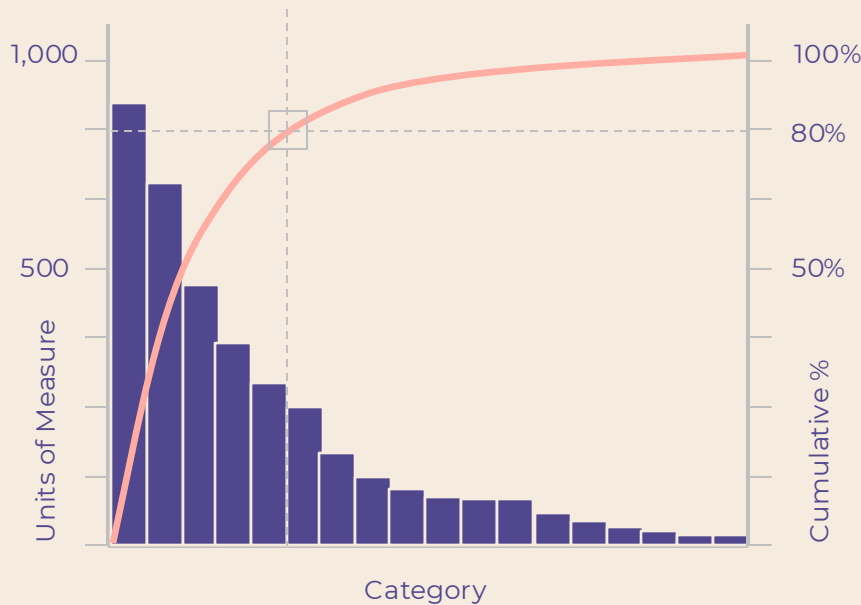
ANALYSE

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

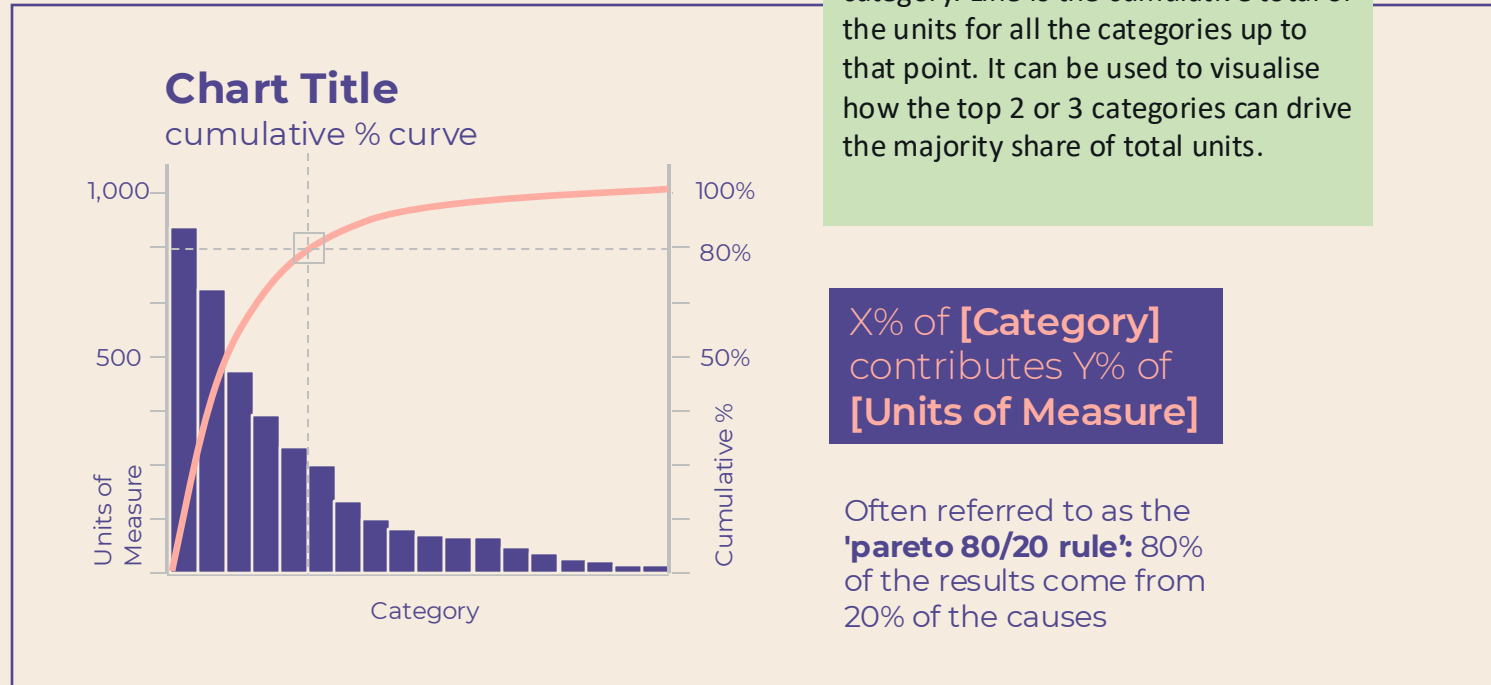
ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS

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.



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

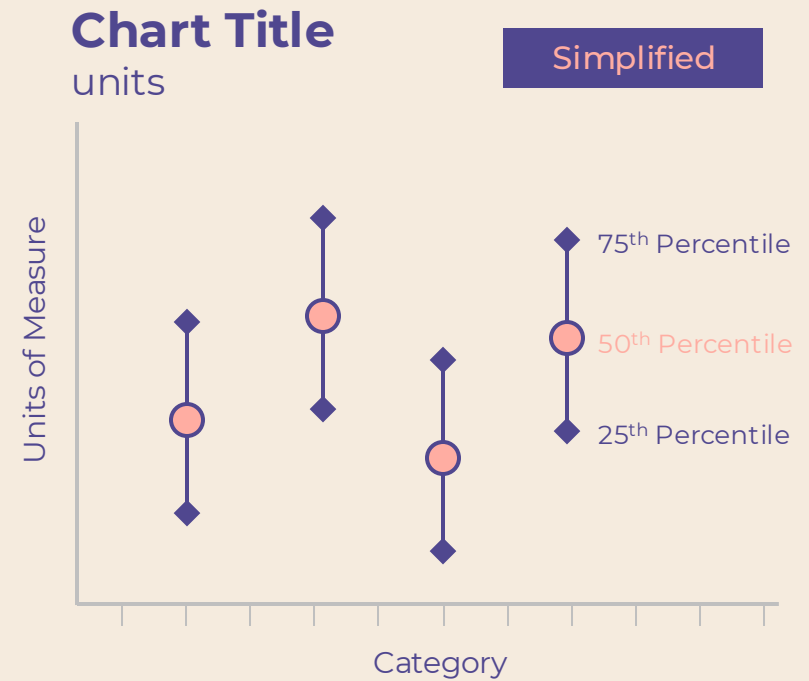
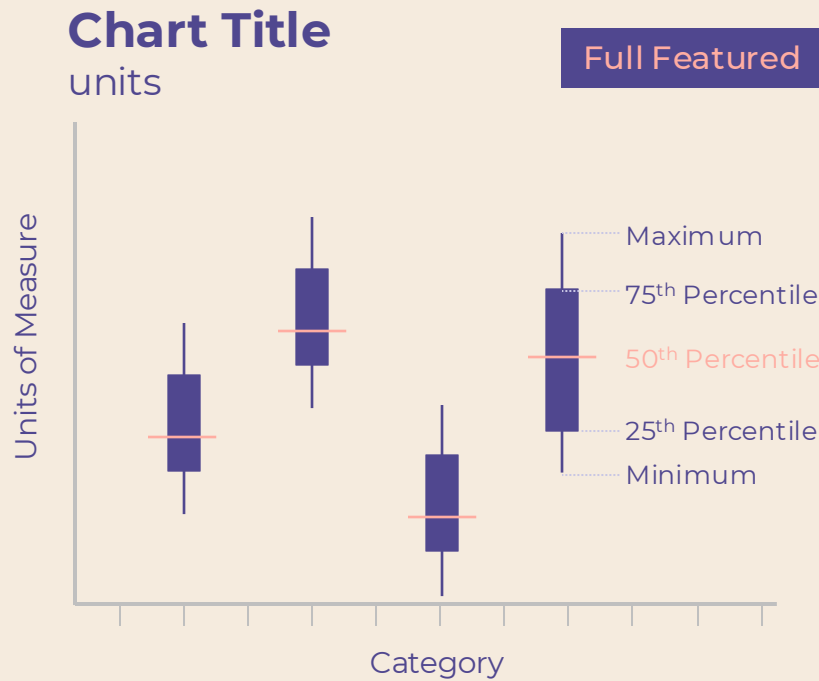
Often referred to as the
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of the results come from
20% of the causes

Candlestick

ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK



Candlestick

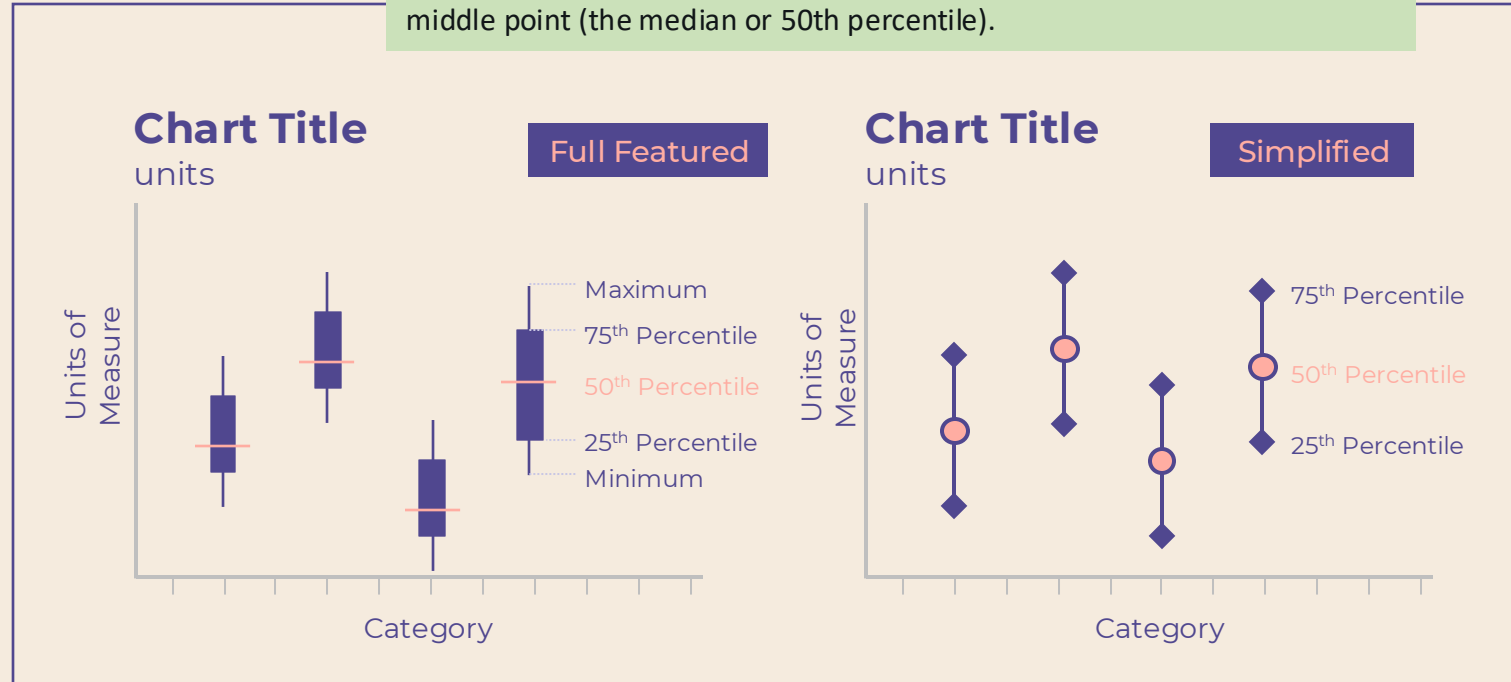
ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS

Candlestick chart

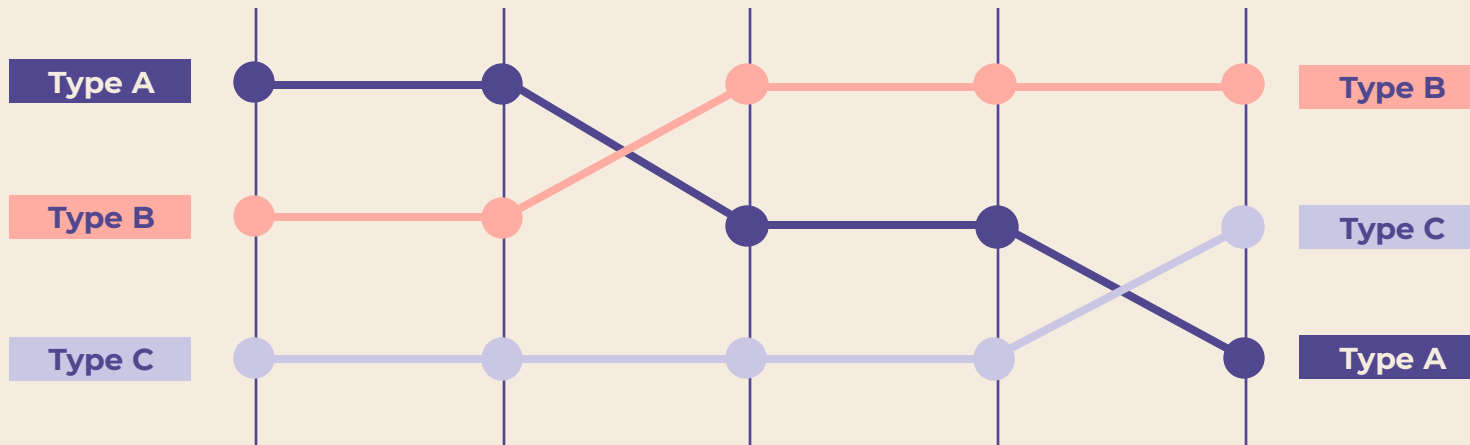
Used to display highs and lows of a category of data, typically the max low or high (bottom and top wicks), the bar (for 25th and 75th percentiles, and a middle point (the median or 50th percentile).



Rank ANALYSE

OVERNIGHT STRATEGIST

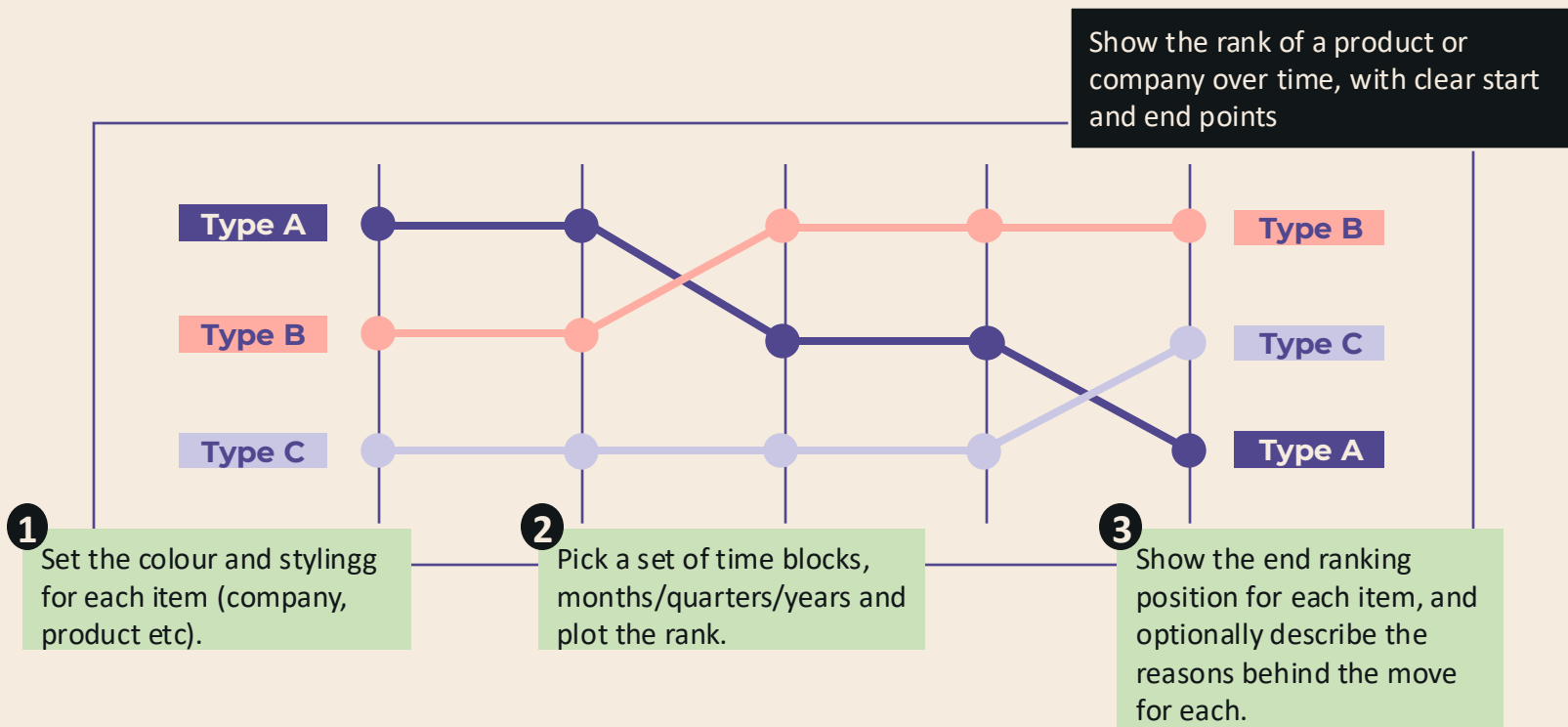
FRAMEWORK



Rank ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS



Unit Economics

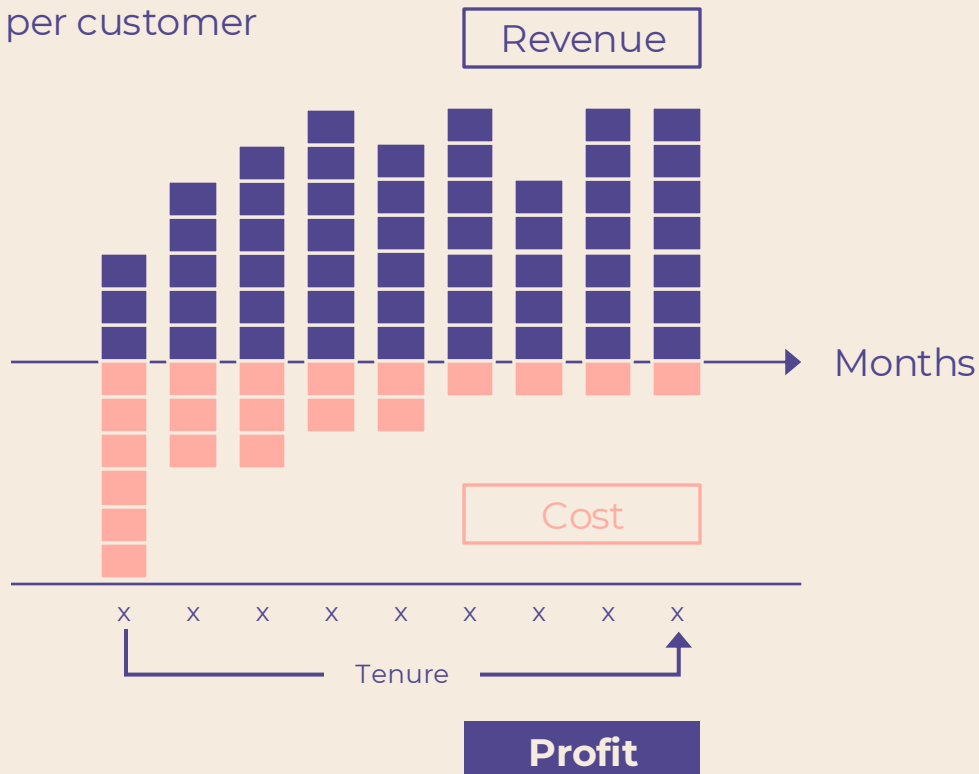
ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

Dollars \$

per customer



LTV

Lifetime Value

CAC

Customer
Acquisition Cost

LTV:CAC

Ratio

CAC Payback

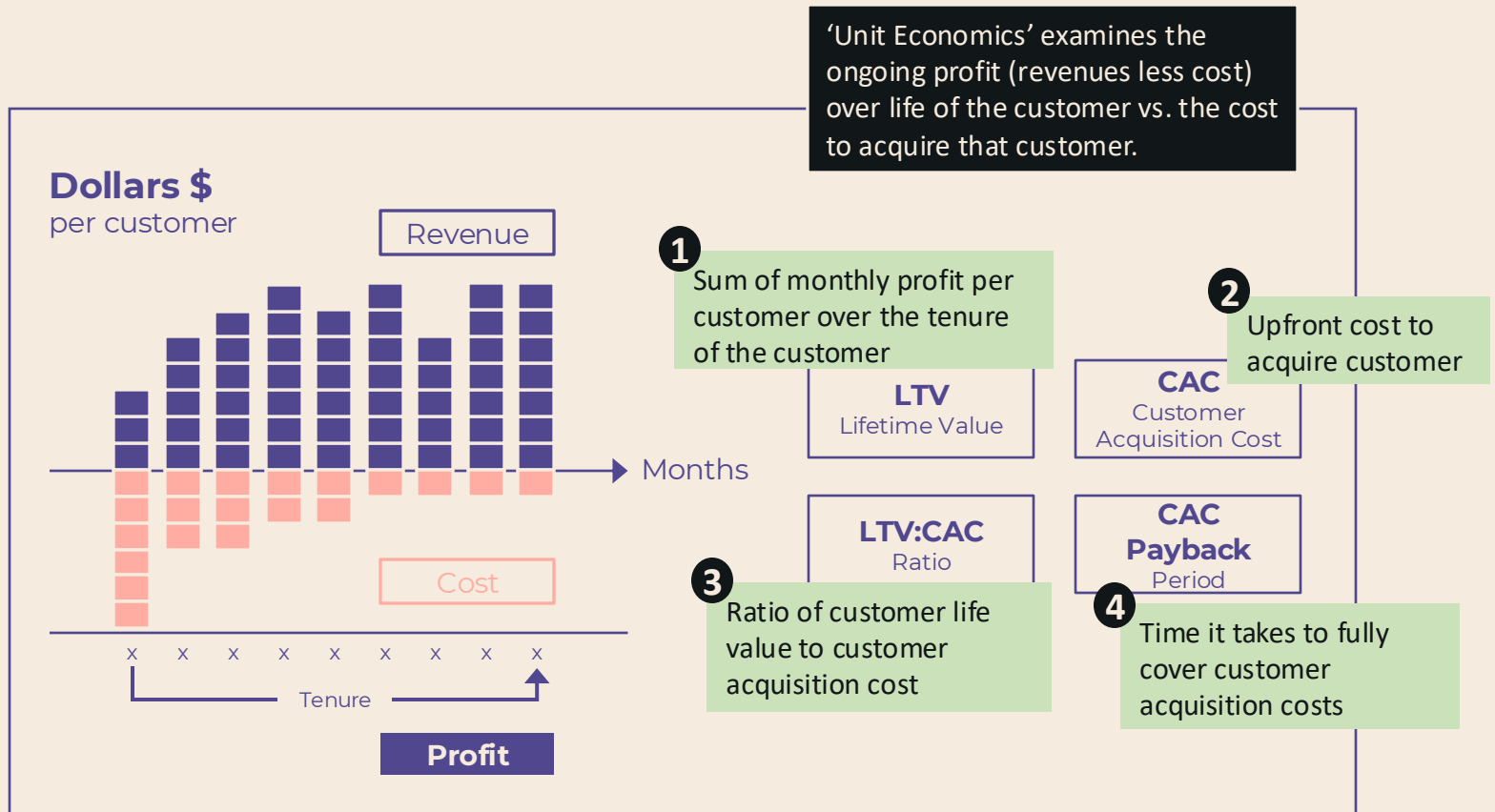
Period

Unit Economics

ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS



Waterfall

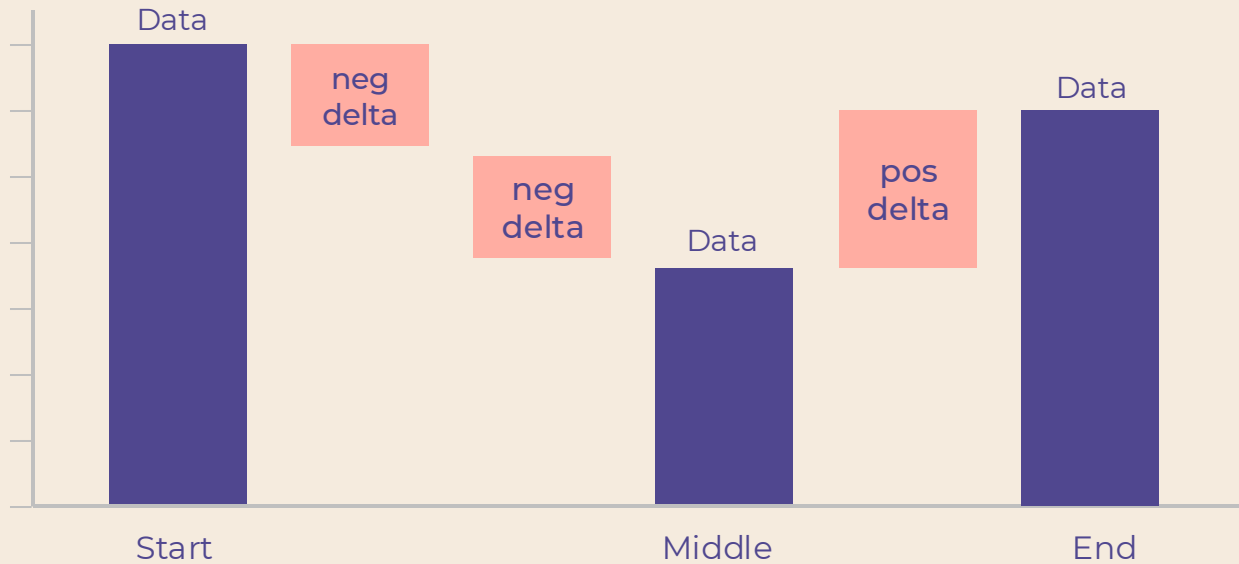
ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

Chart Title

units

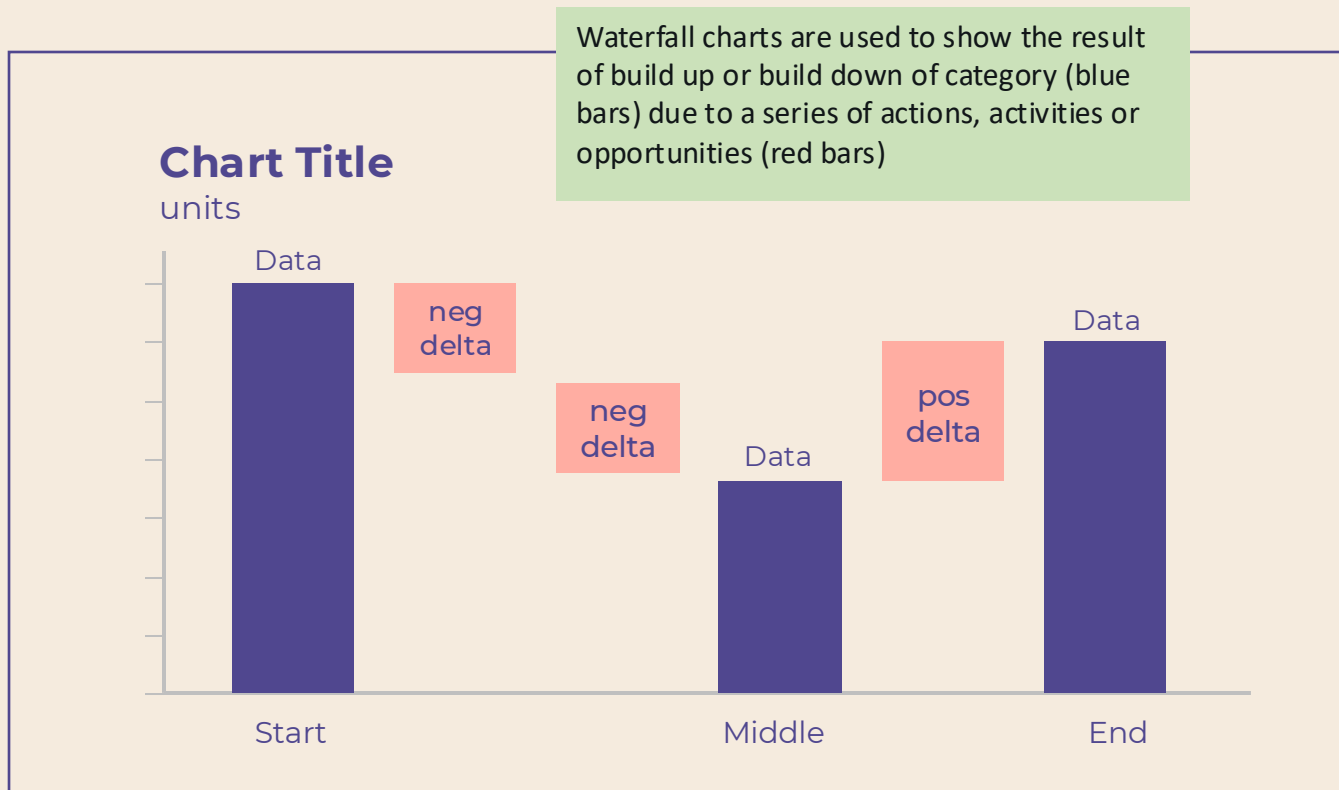


Waterfall

ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS



Marginal Return

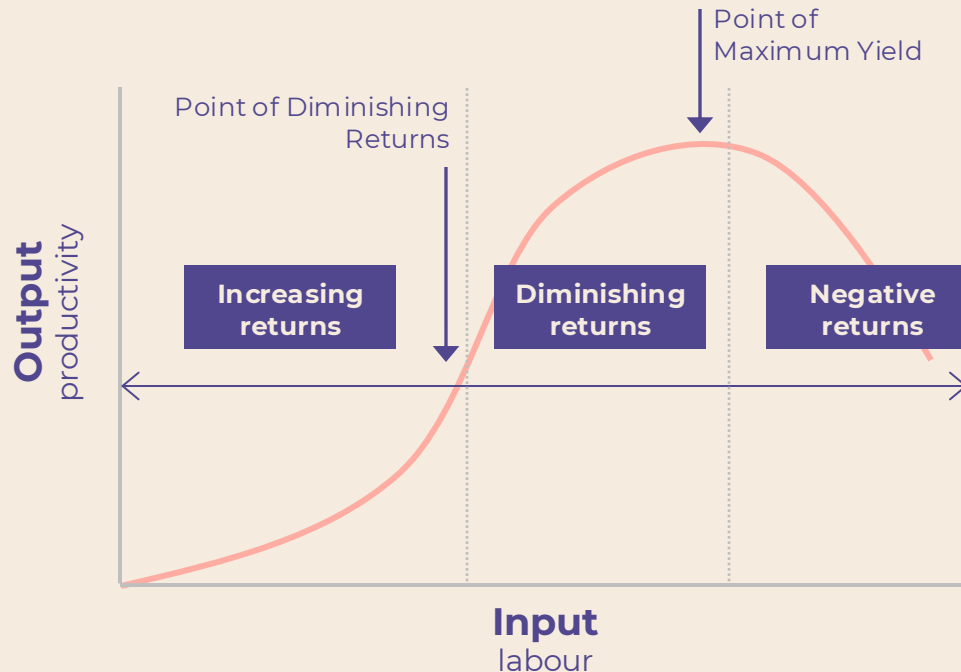
ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

Law of diminishing returns

input vs. output



Marginal Return

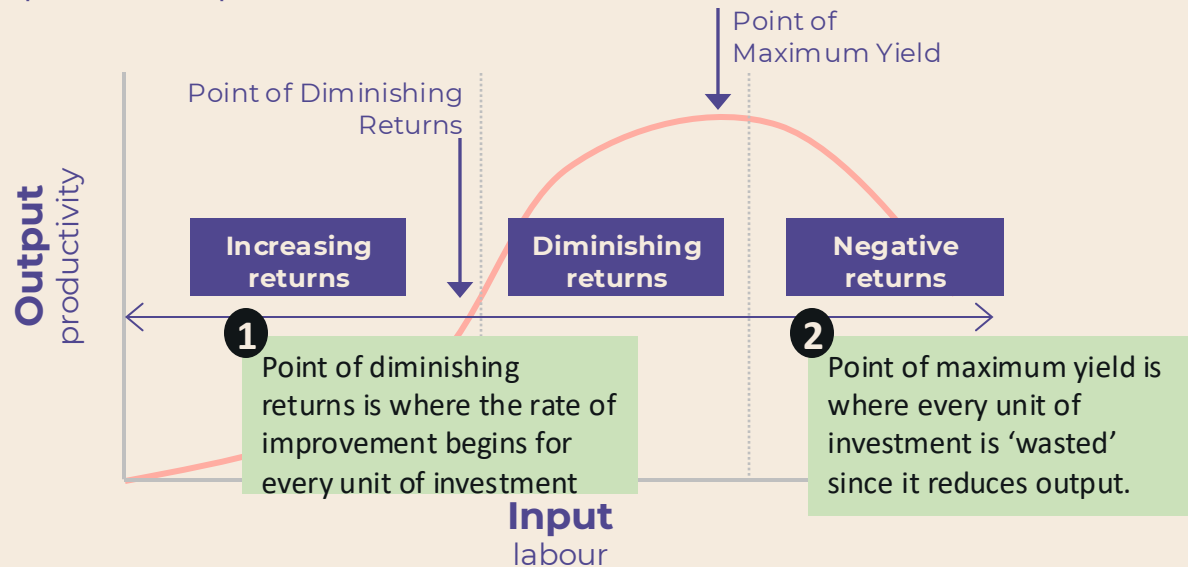
ANALYSE

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

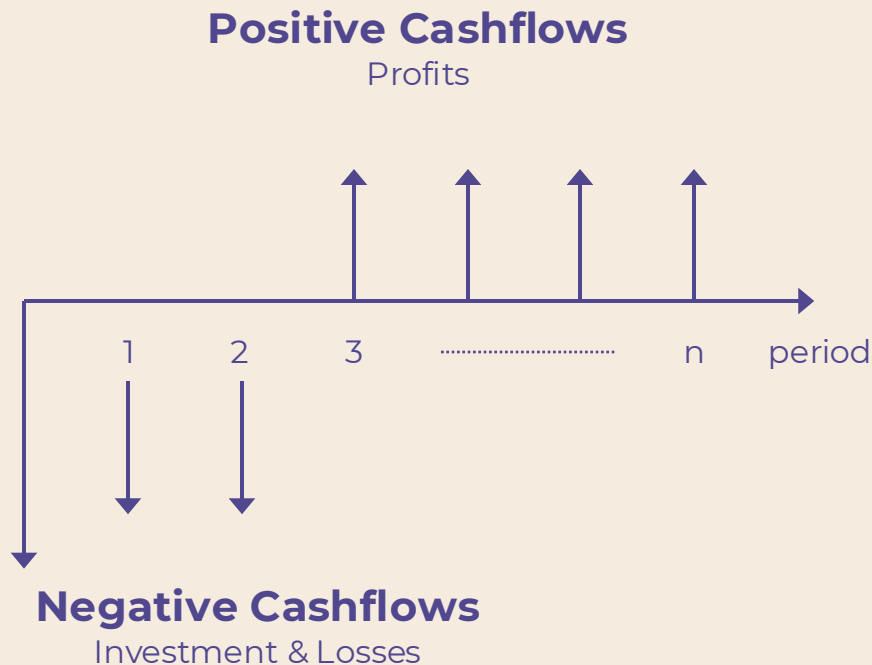


Cashflow

ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK



NPV

Net present value

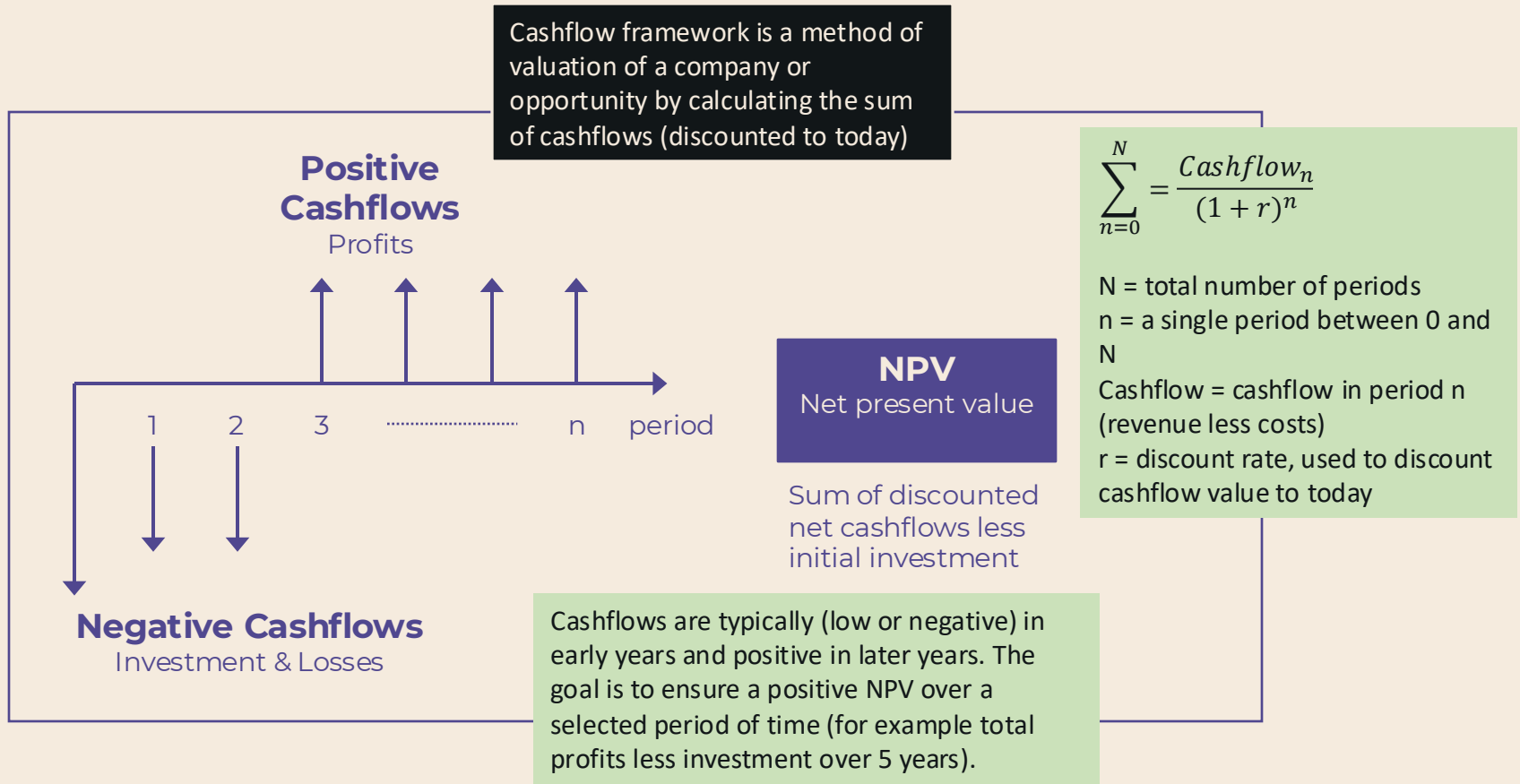
Sum of discounted
net cashflows less
initial investment

Cashflow

ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS

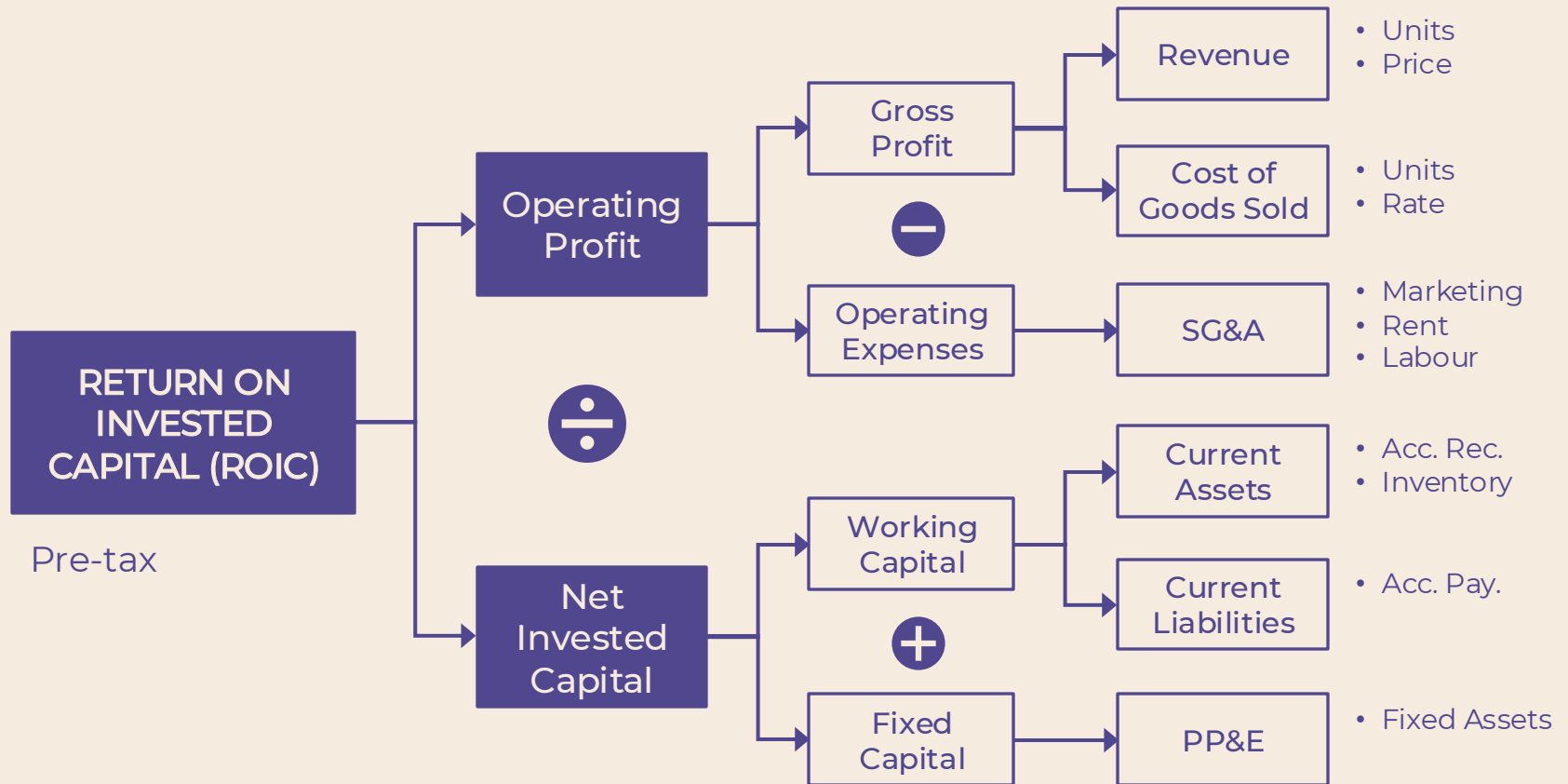


ROIC

ANALYSE

OVERNIGHT STRATEGIST

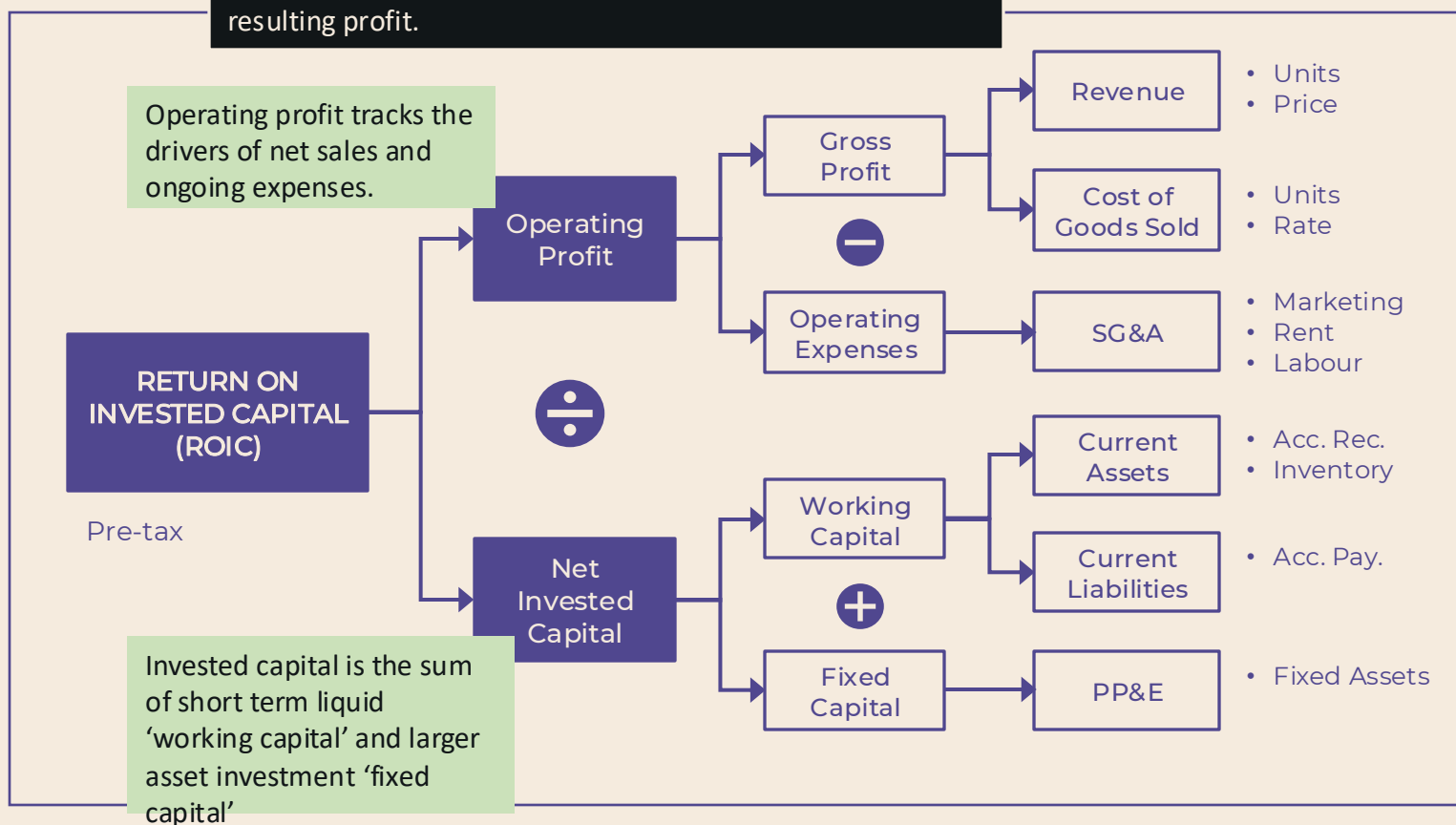
FRAMEWORK



ROIC

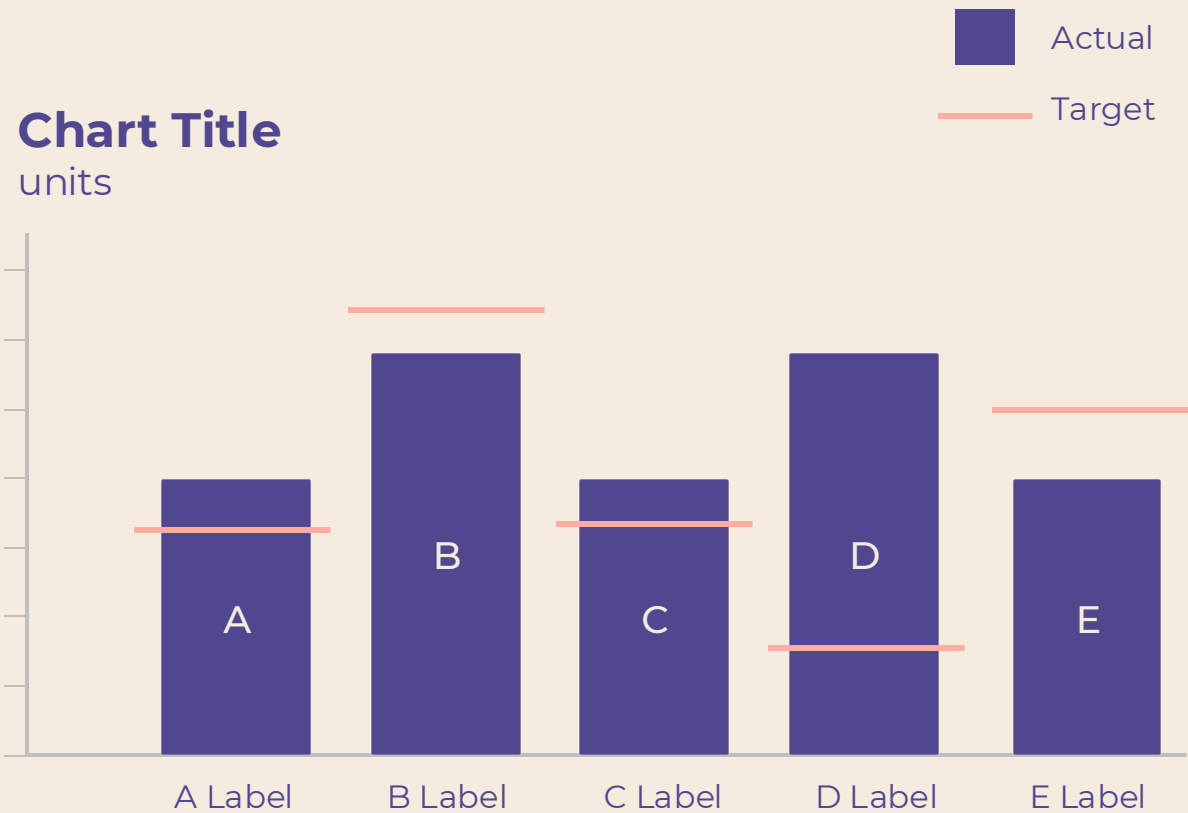
ANALYSE

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

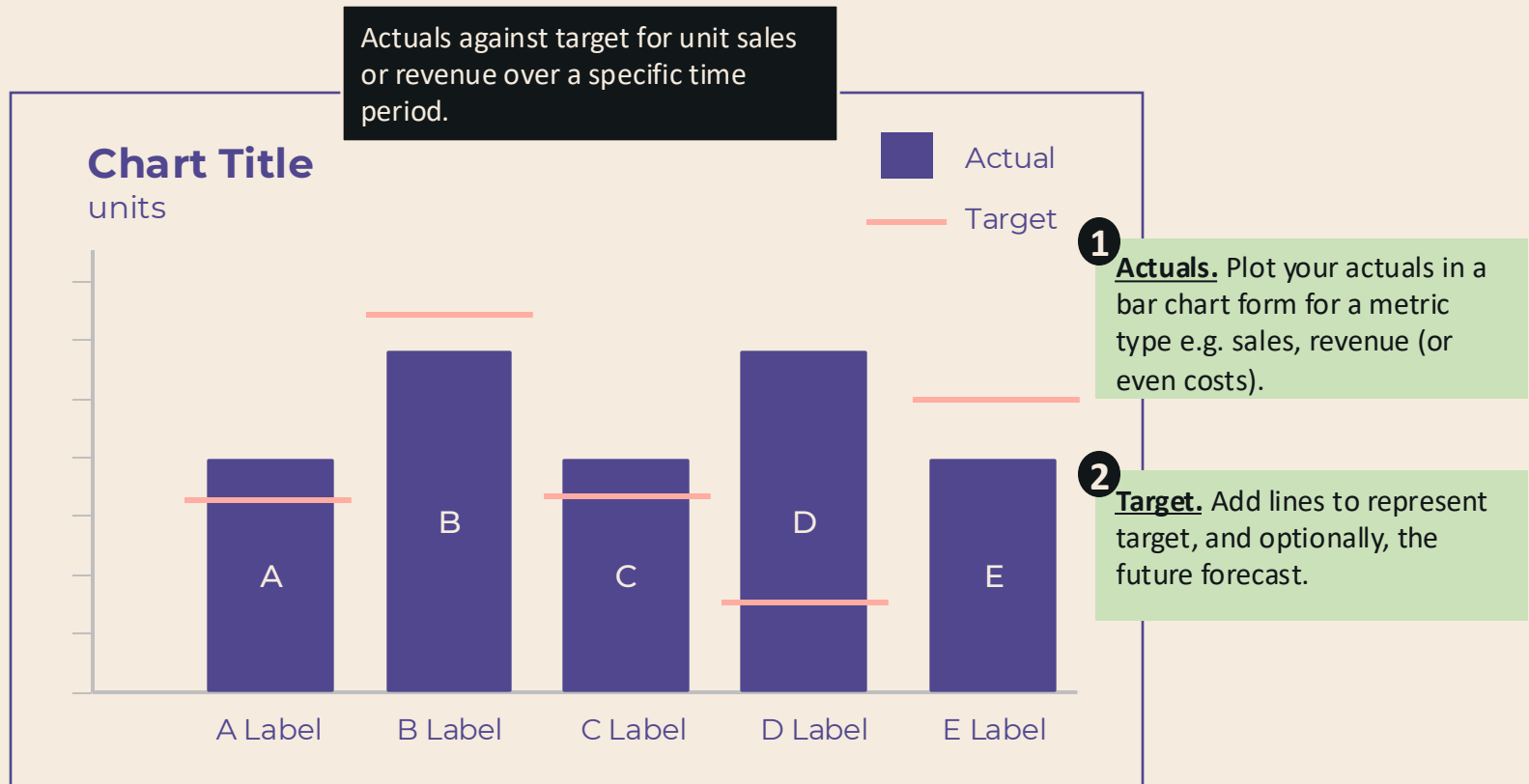


Actual v Target

ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS



Profit Margin

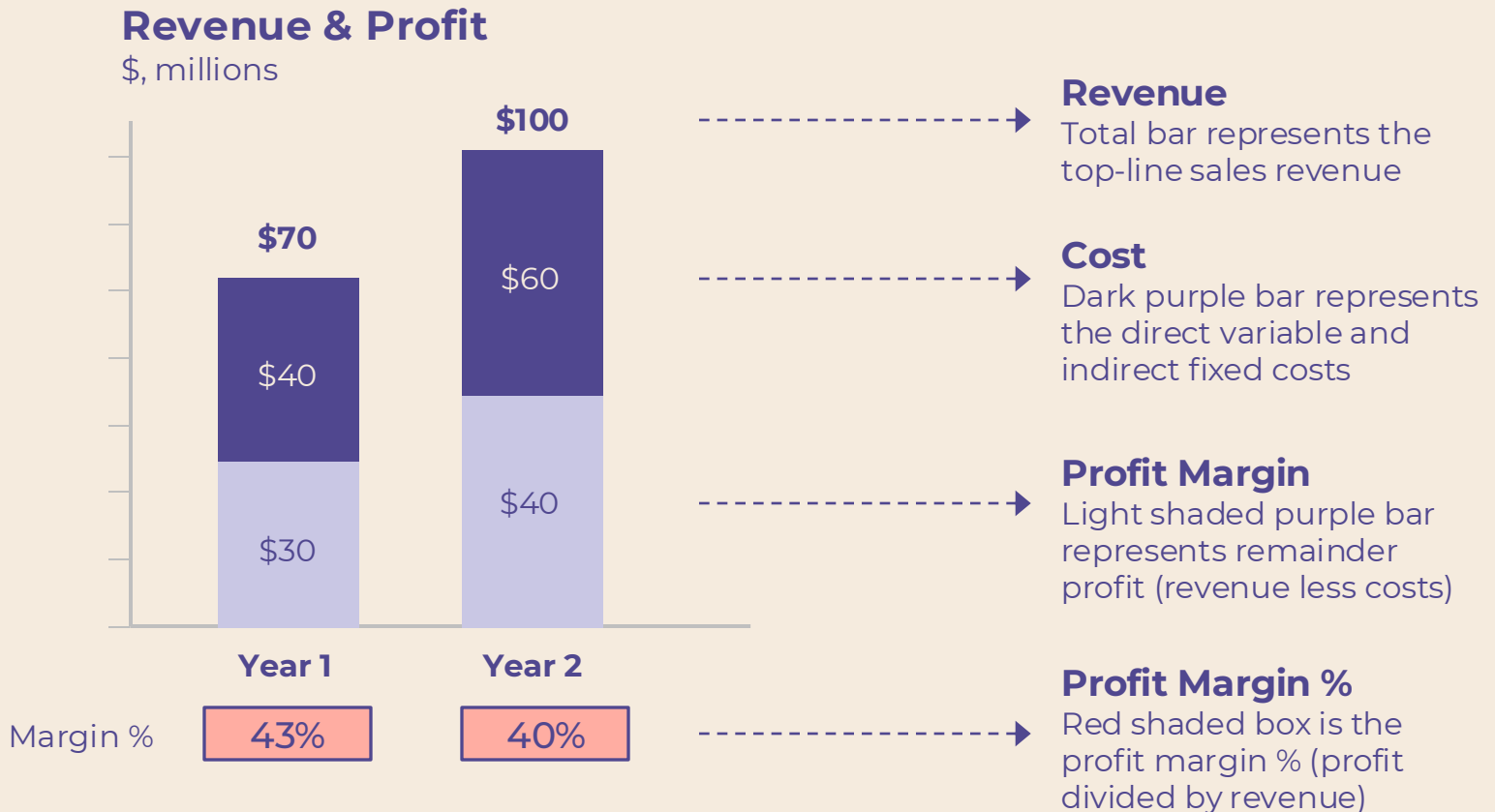
ANALYSE

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FRAMEWORK

+

INSTRUCTIONS

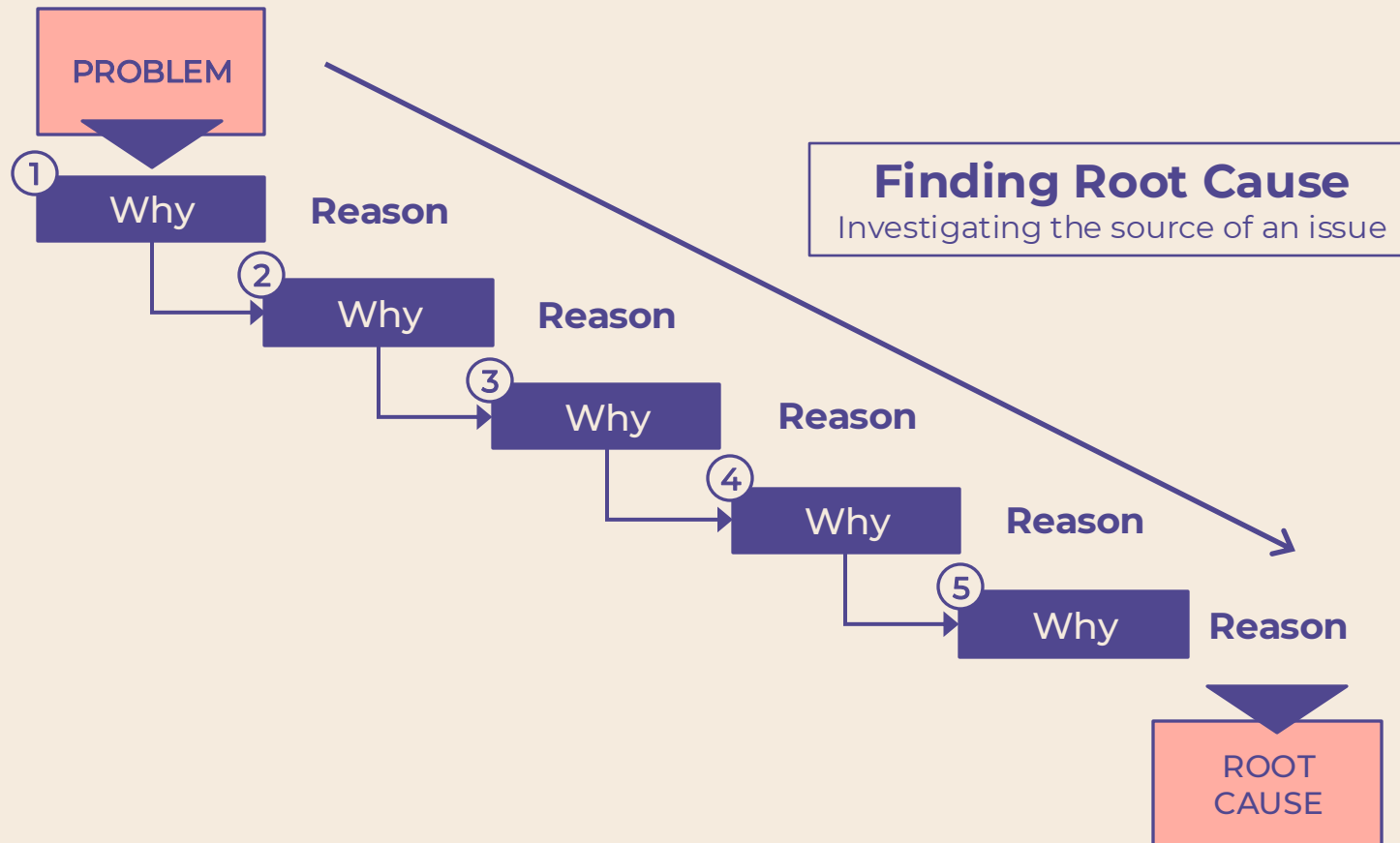


5 Why's

ANALYSE

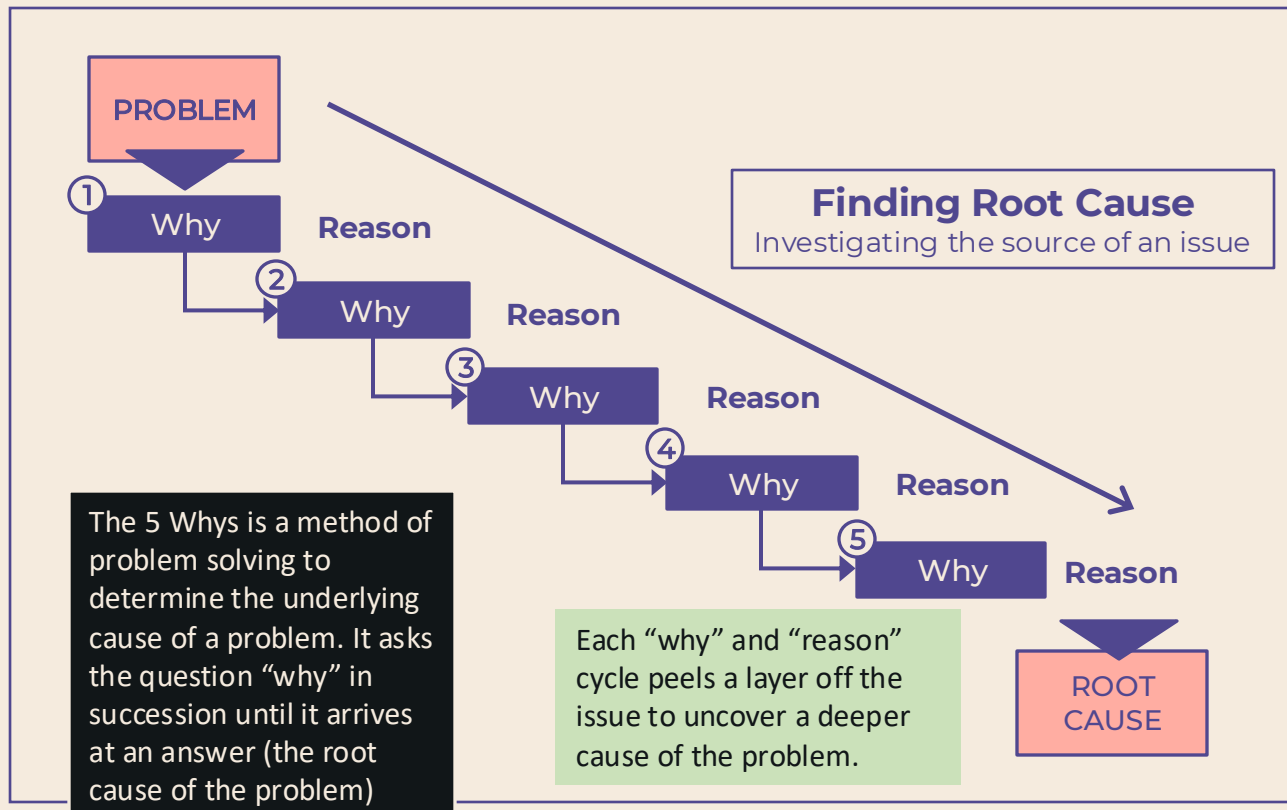
OVERNIGHT STRATEGIST

FRAMEWORK



5 Why's

ANALYSE

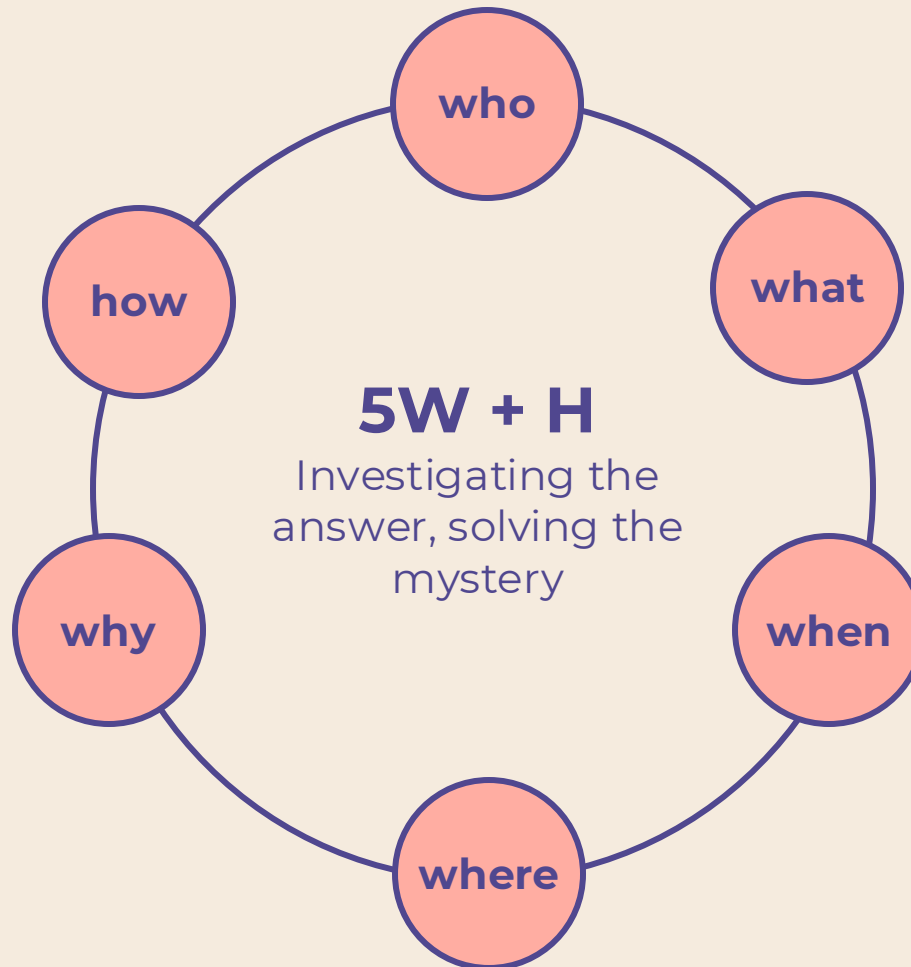


5W + H

ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

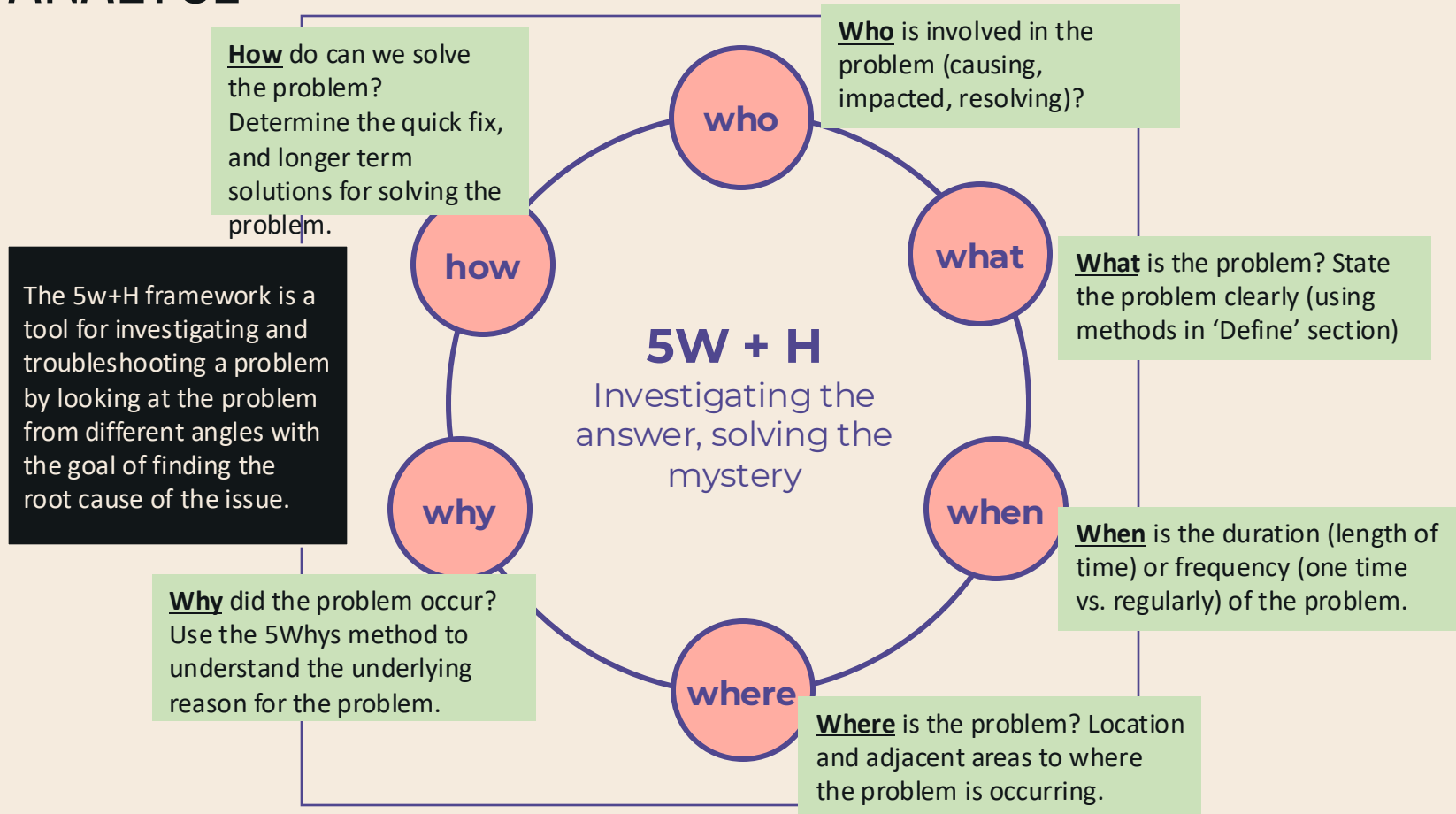


5W + H

ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS



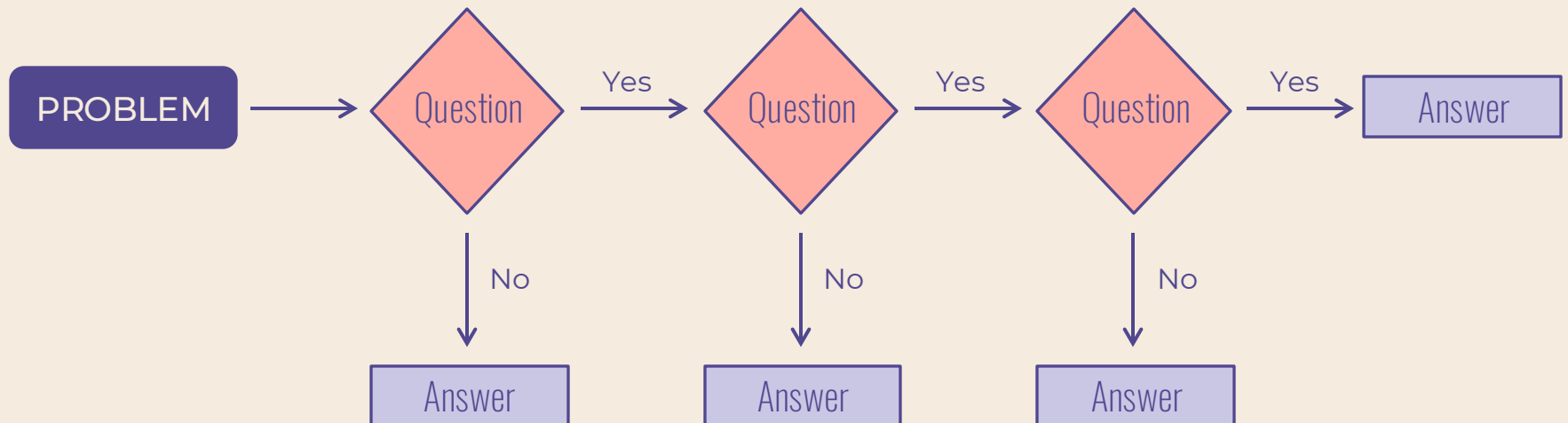
Yes/No

ANALYSE

OVERNIGHT STRATEGIST

FRAMEWORK

Yes/No Flowchart



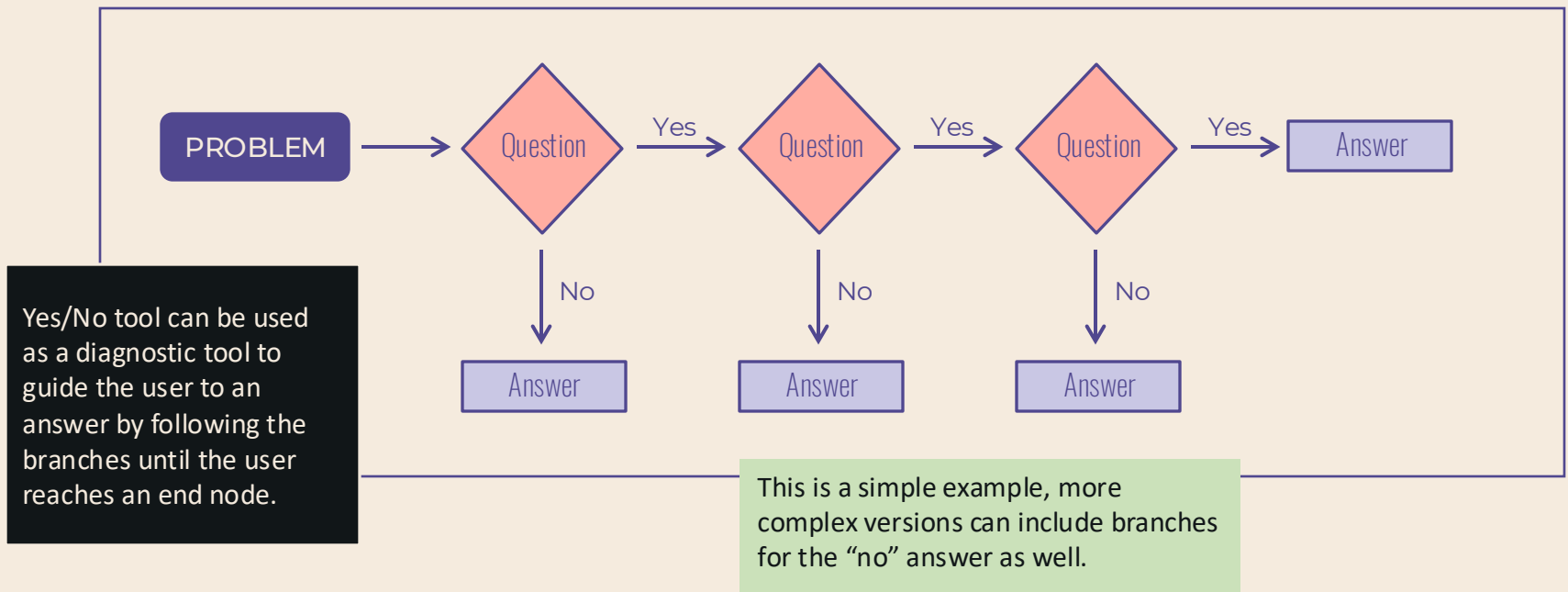
Yes/No

ANALYSE

OVERNIGHT STRATEGIST

INSTRUCTIONS

Yes/No Flowchart

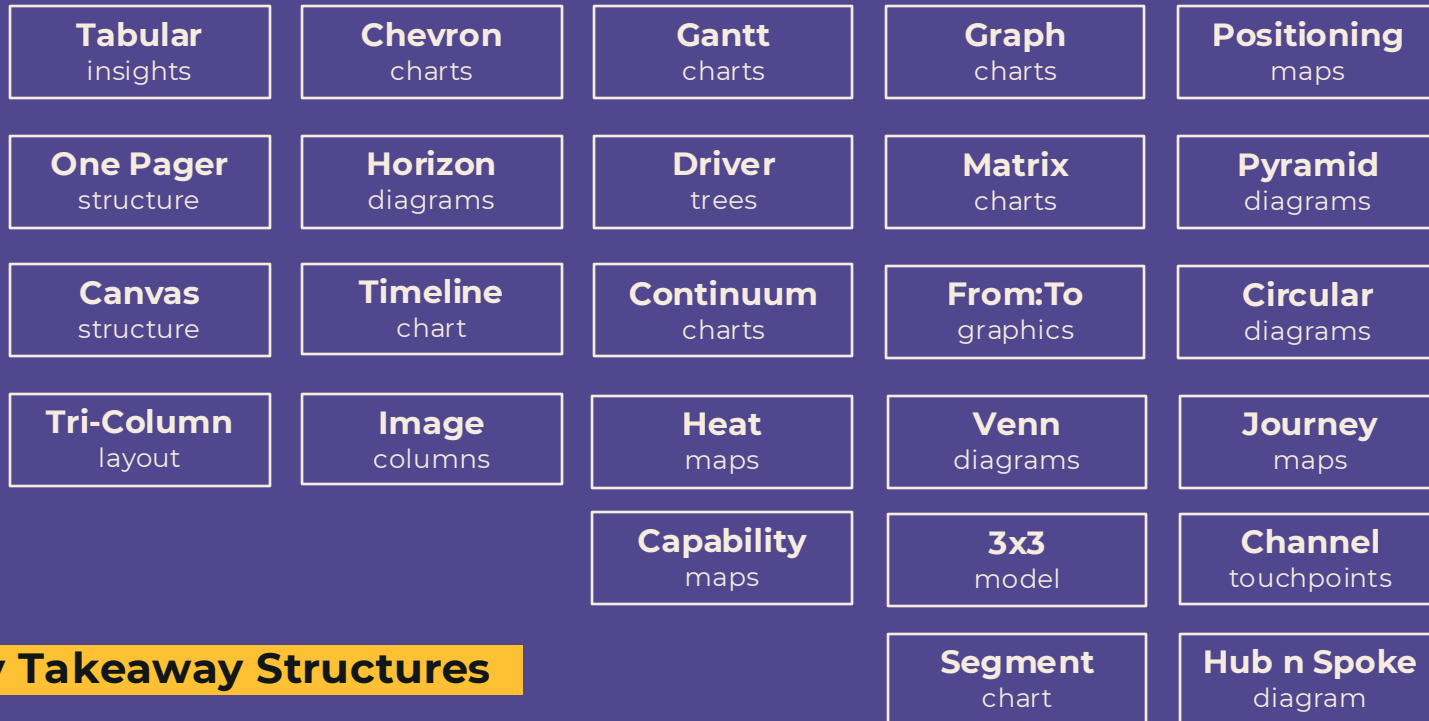


Insight

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.

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

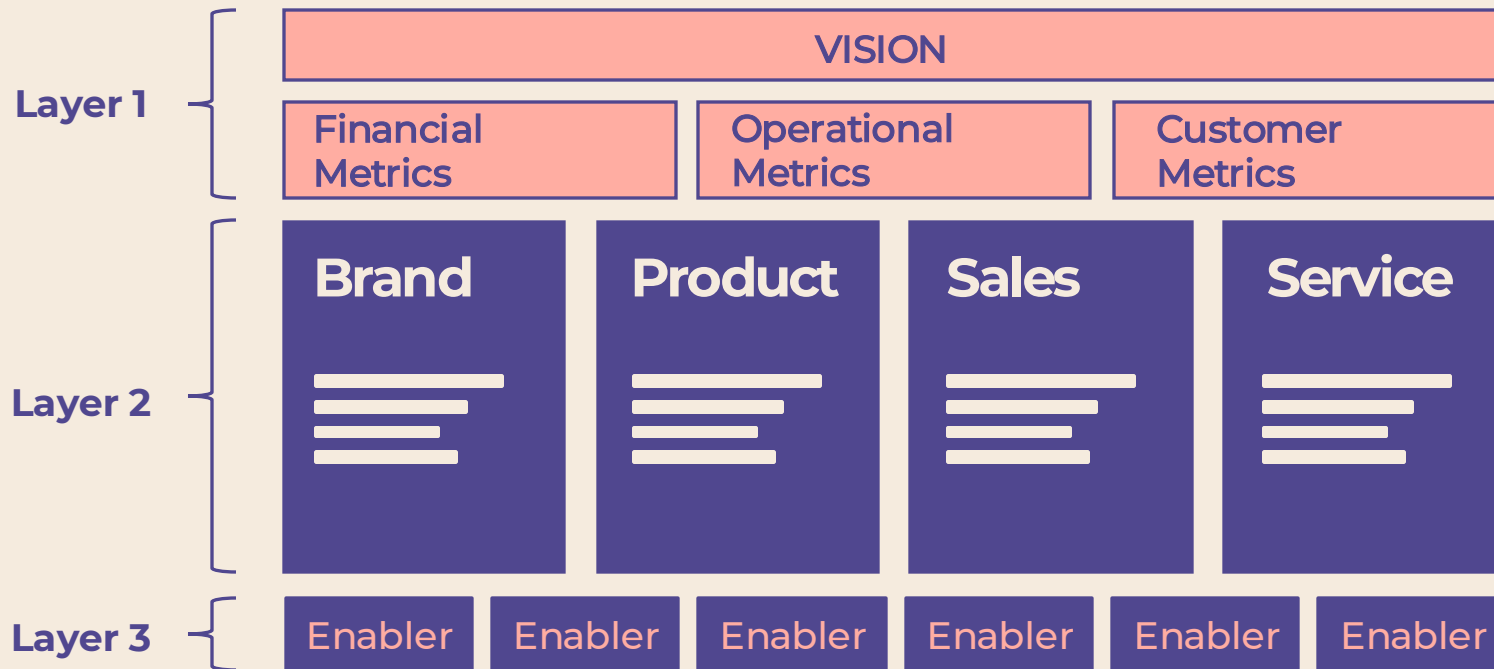
One Pager

INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

'Business Strategy On-A-Page' Example



One Pager

INSIGHT

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

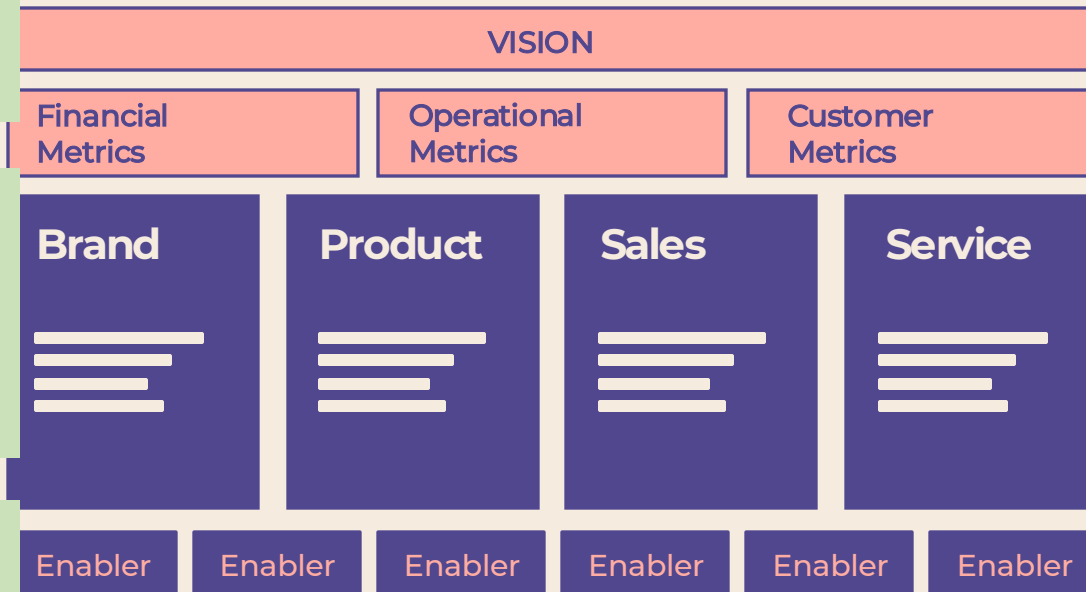
Layer 1: Groups the headline goals of the strategy including your vision and key metrics/targets.

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.



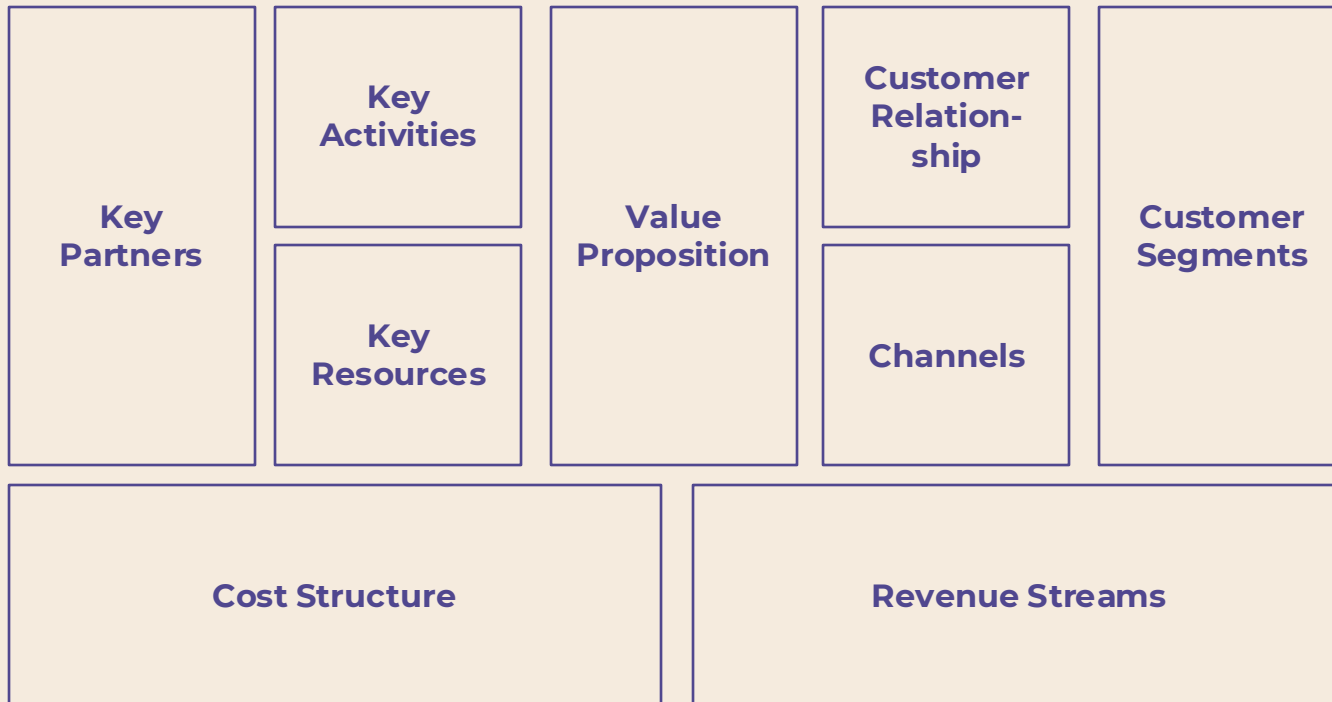
Canvas

INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

'Business Model Canvas' Example



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

Canvas

INSIGHT

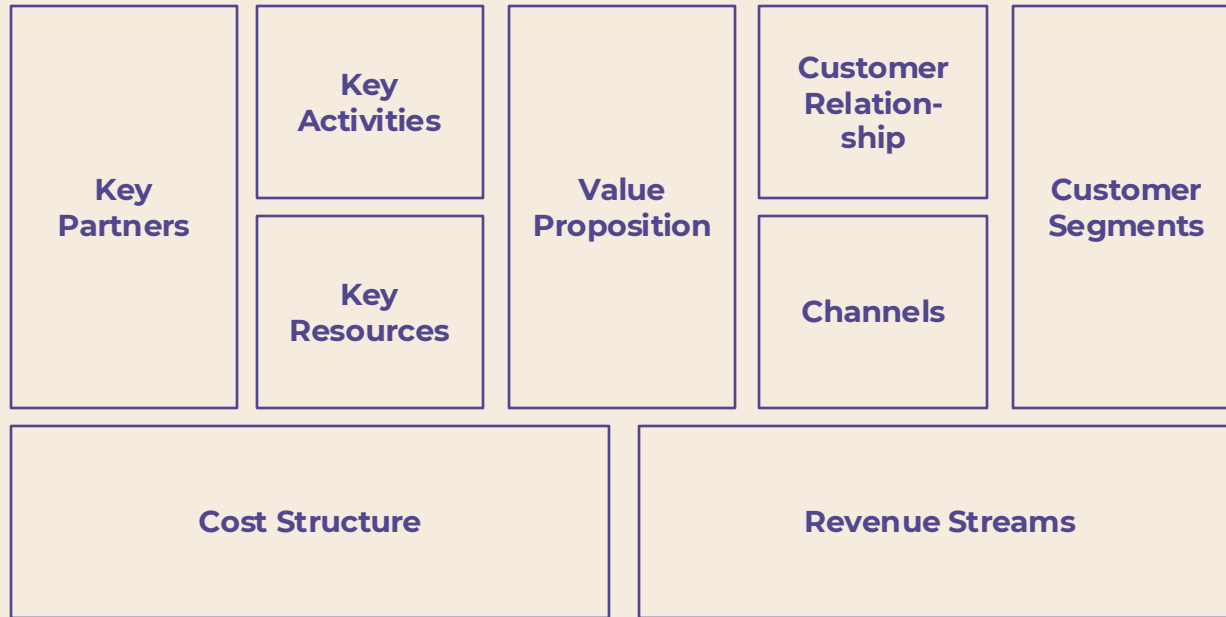
OVERNIGHT STRATEGIST

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.

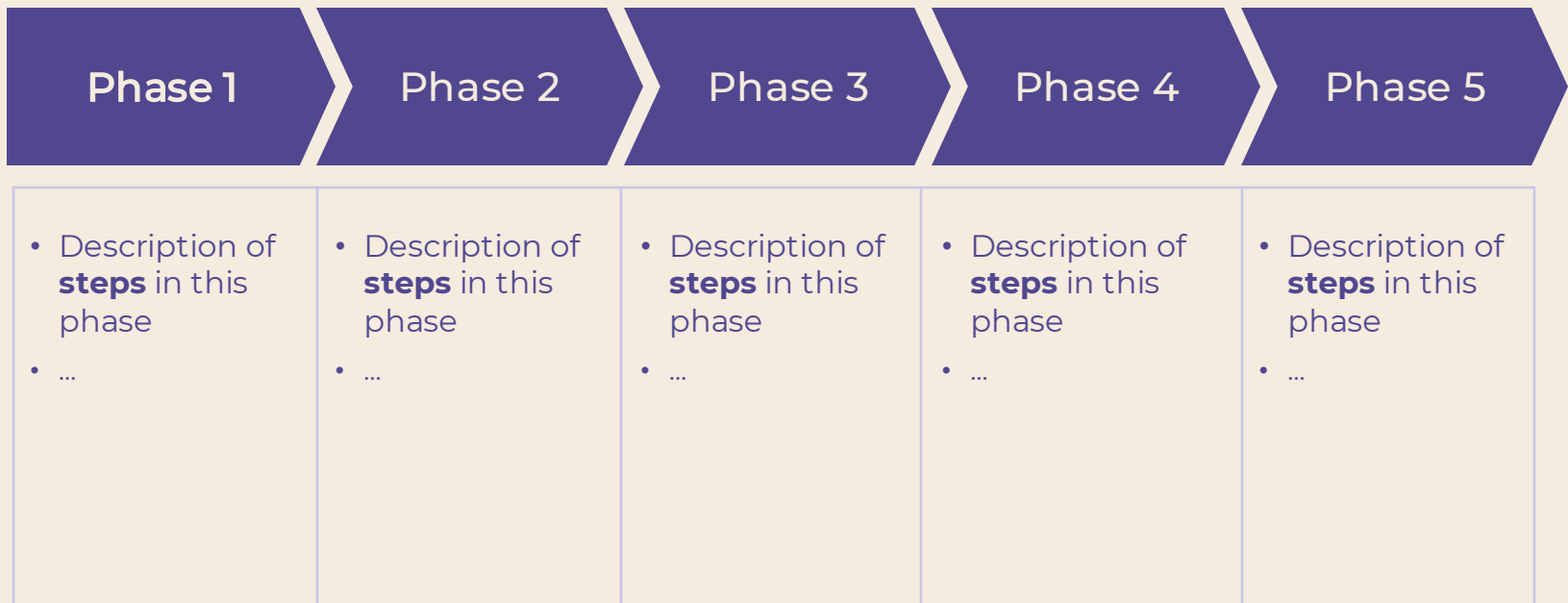
1 Layer 3: This layer is optional but where possible you should include the "so what" one liner implication of the evidence points.

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

- ...

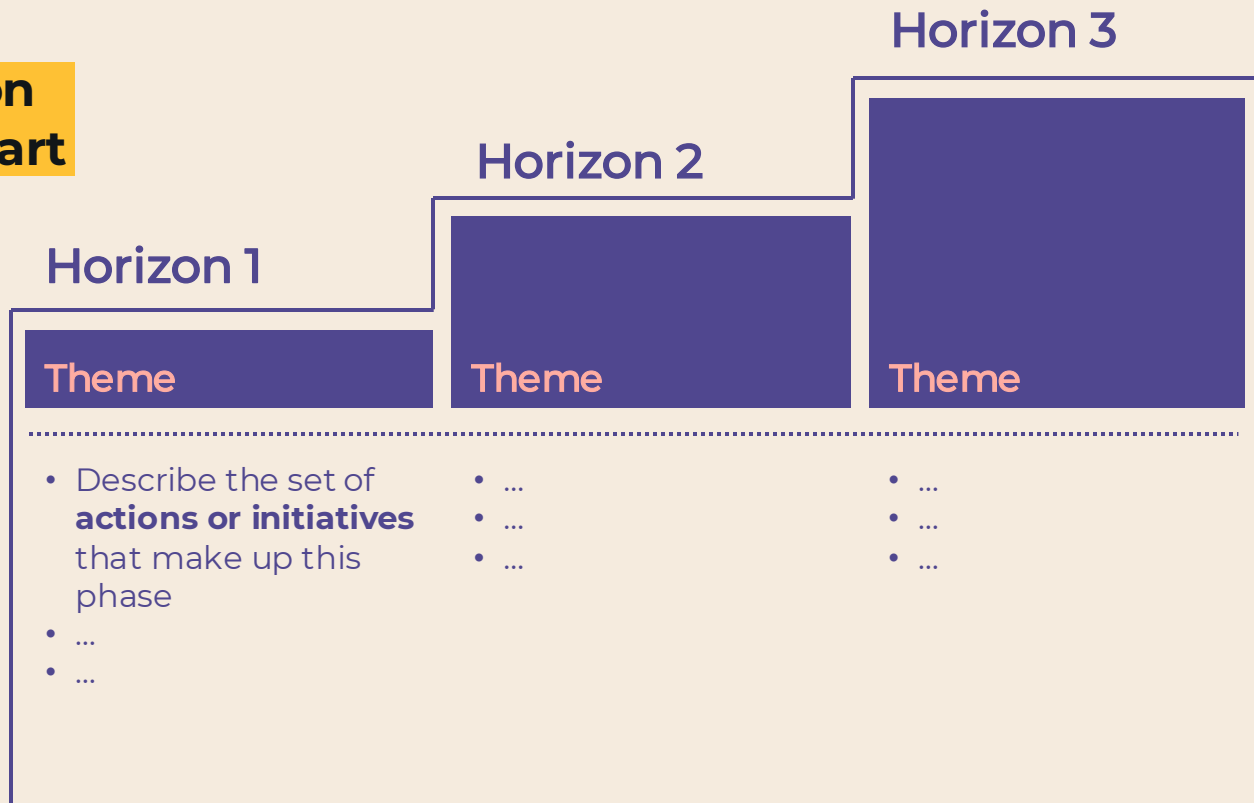
Horizon

INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

3 Horizon Step Chart



Horizon

INSIGHT

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

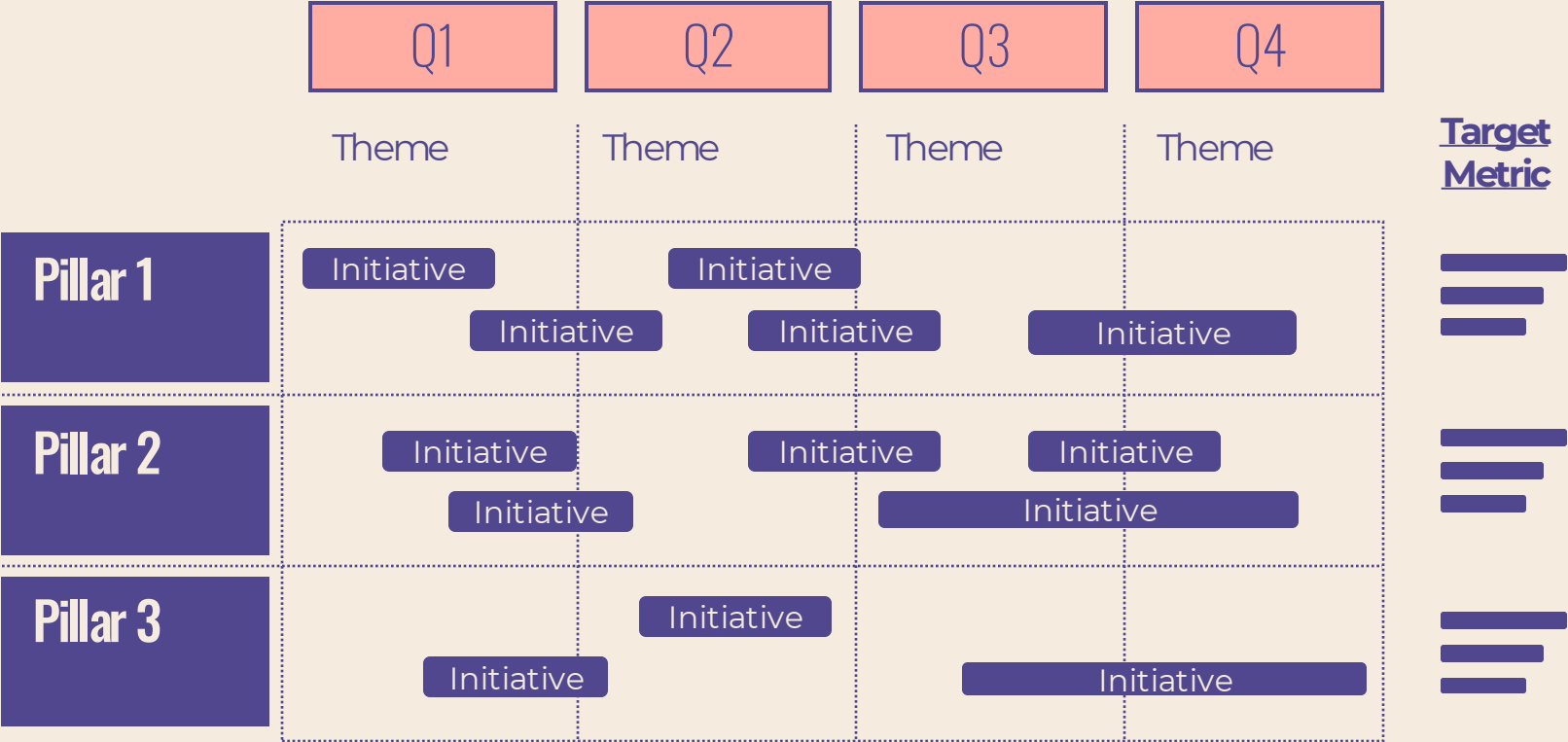
Horizon. Bucket your big ideas into logical 3 step path to the end vision and summarise the set of activities in each horizon as a 'theme' (the common thread or headline objective for that horizon).

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

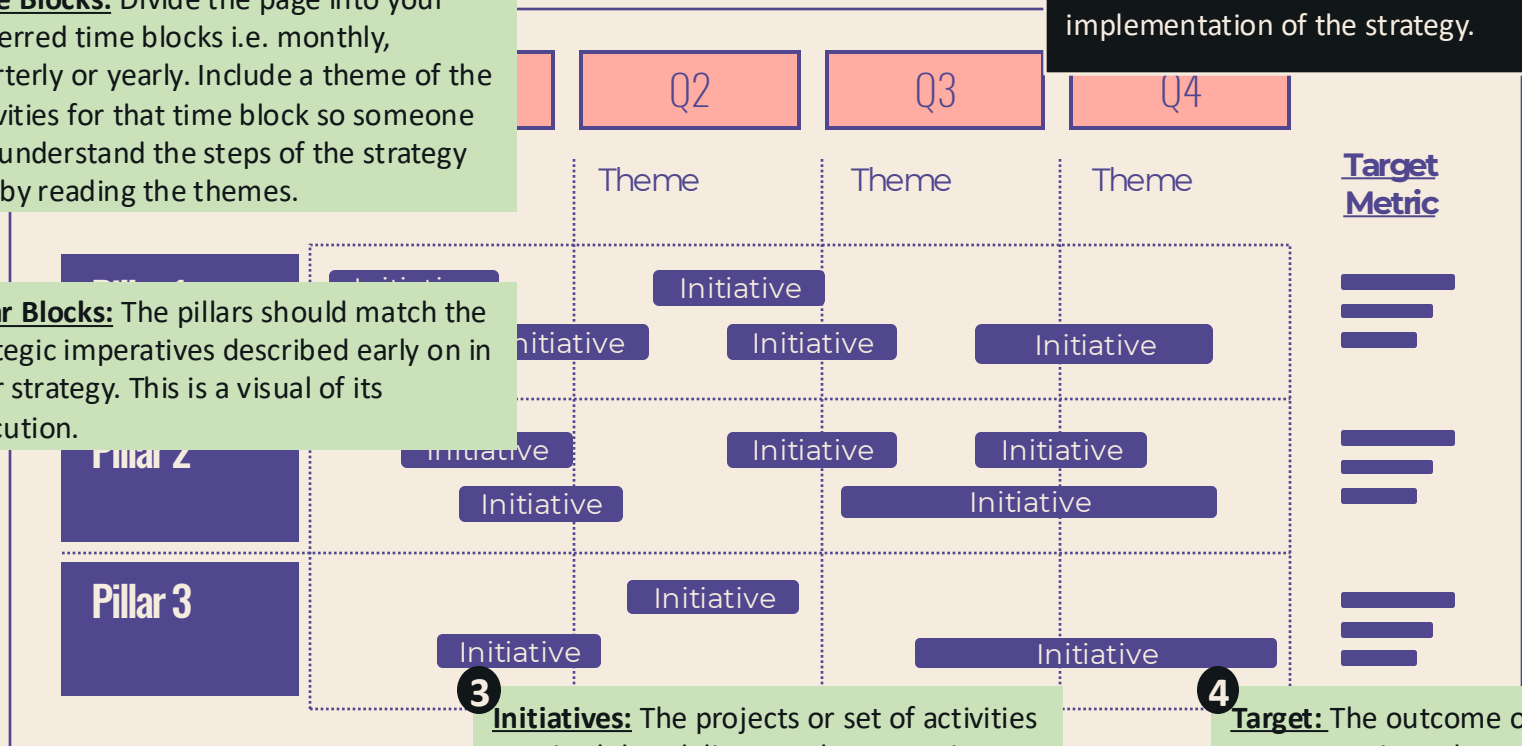
1 Time Blocks: Divide the page into your preferred time blocks i.e. monthly, quarterly or yearly. Include a theme of the activities for that time block so someone can understand the steps of the strategy just by reading the themes.

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.

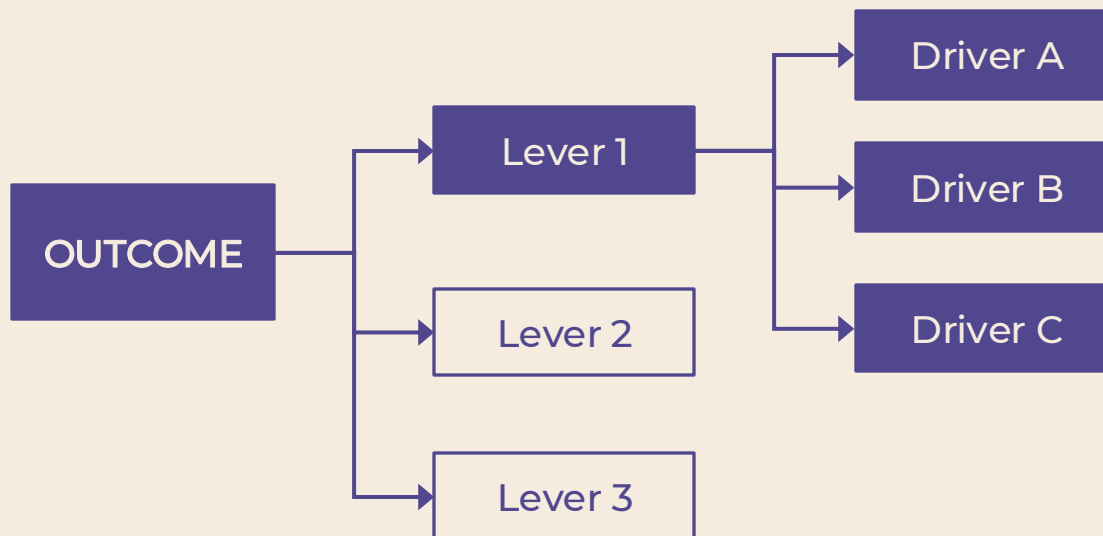


Driver Tree

INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

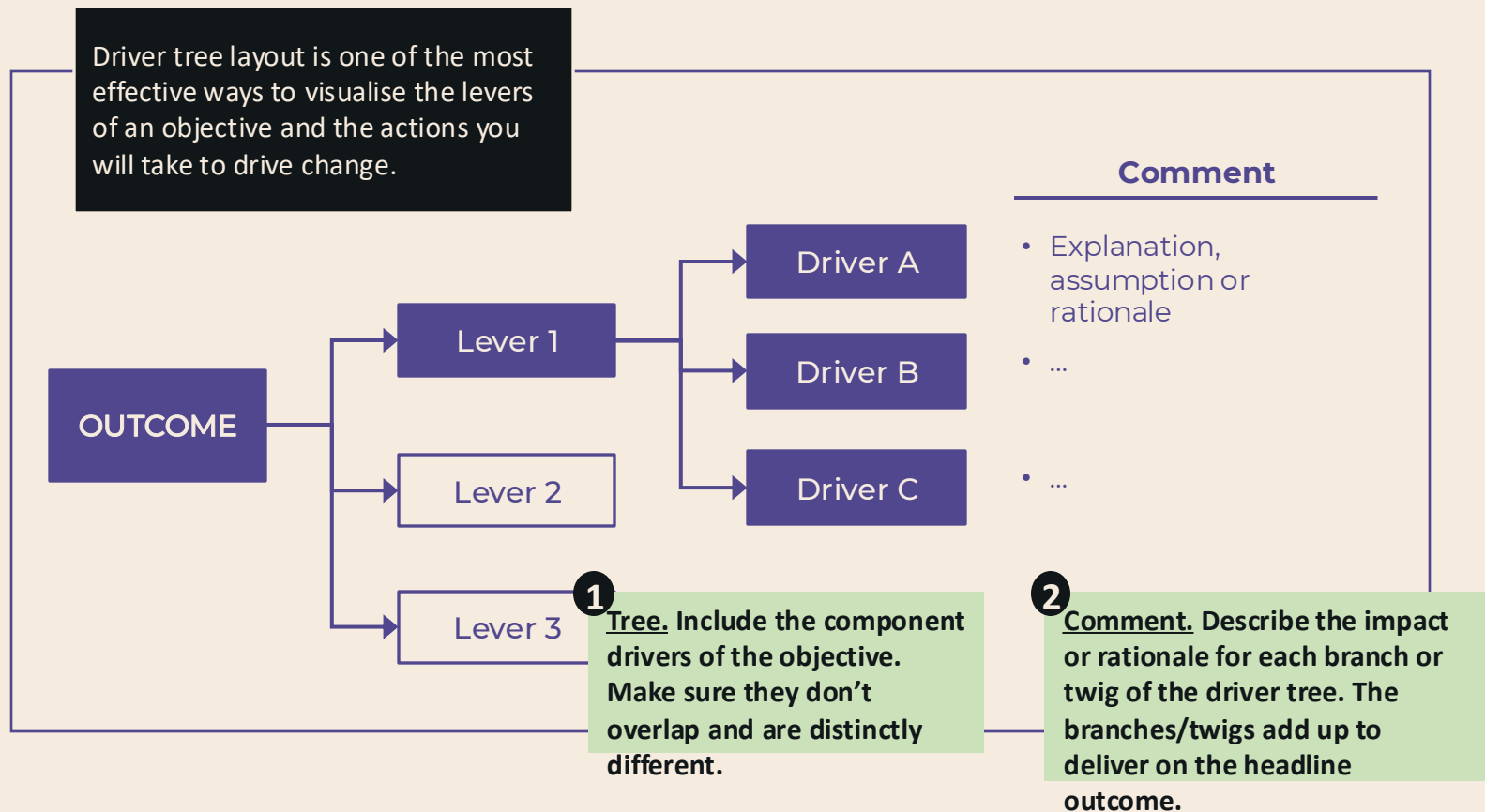


Comment

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

Driver Tree

INSIGHT



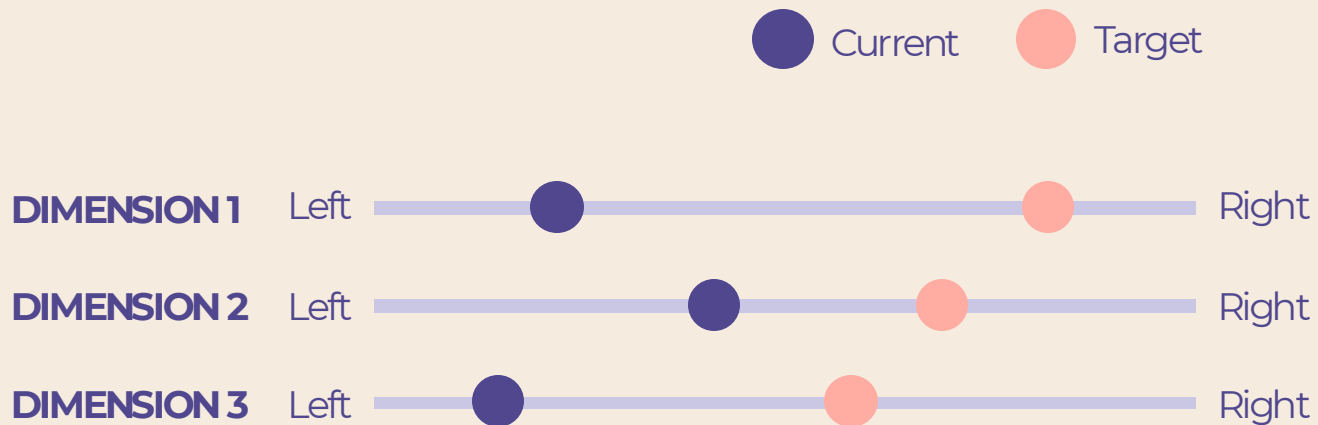
Continuum

INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

Continuum Sliders



Continuum

INSIGHT

OVERNIGHT STRATEGIST

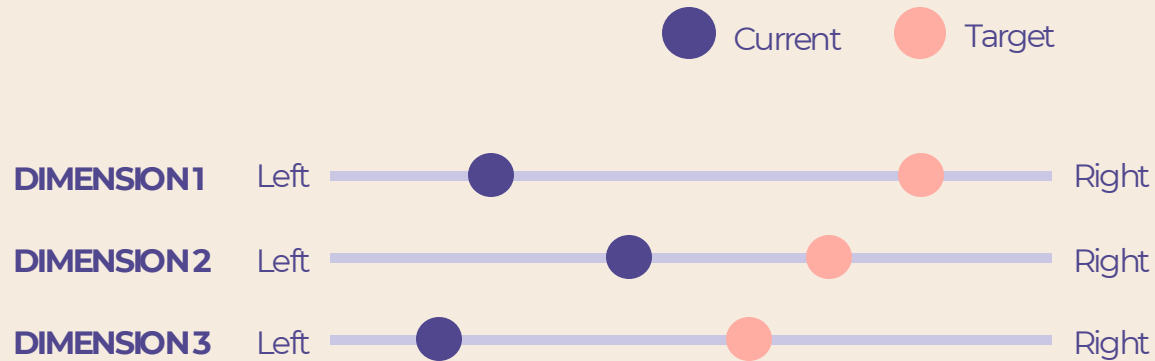
INSTRUCTIONS

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.

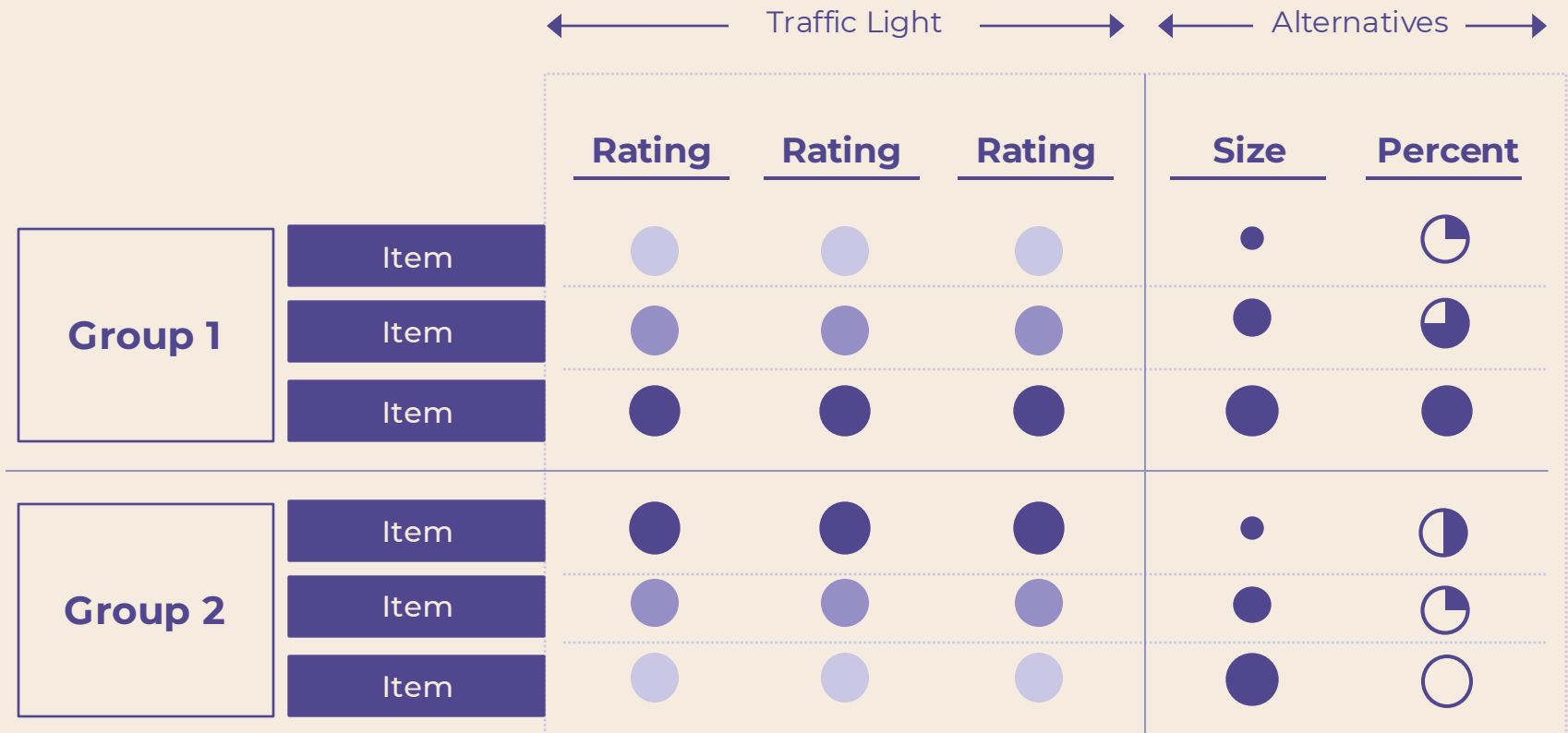


Heat Map

INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK



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

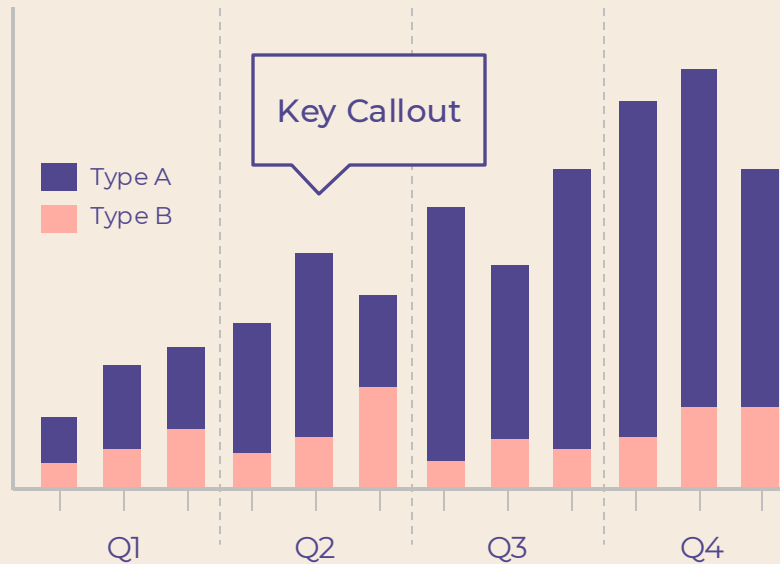
INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

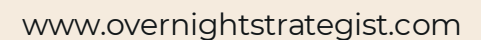
Headline Statement

units



Takeaway

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



Matrix

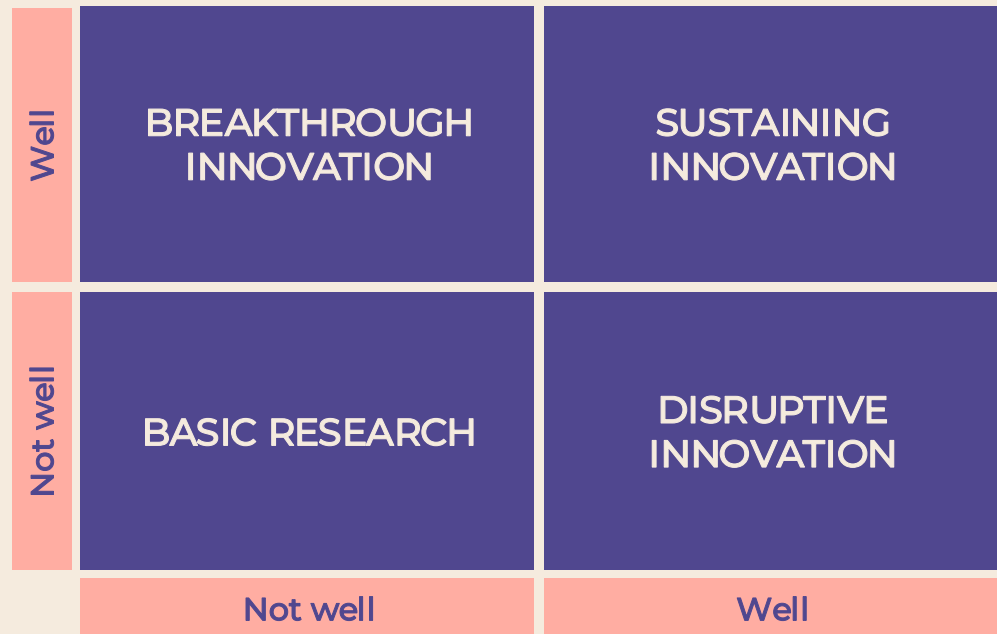
INSIGHT

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
	Not well	Well
Not well	BASIC RESEARCH	DISRUPTIVE INNOVATION

How well is the domain defined?

Ref. Innovation Matrix, Greg Satell

From:To

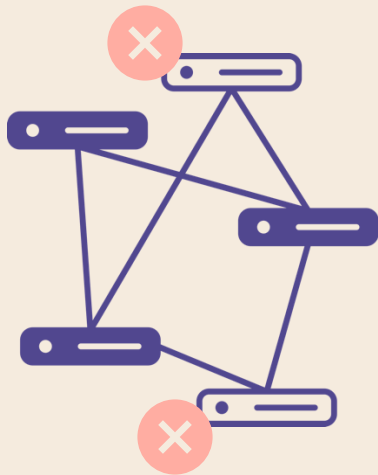
INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

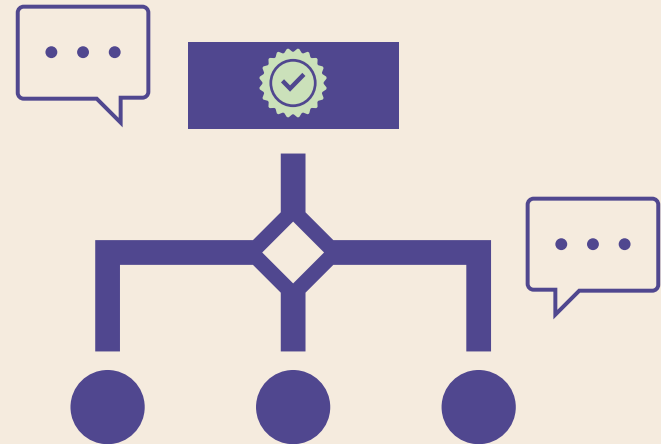
The 'Before' and 'After' Visual

Current State



COMPLEX

Future State



SIMPLE

From:To

INSIGHT

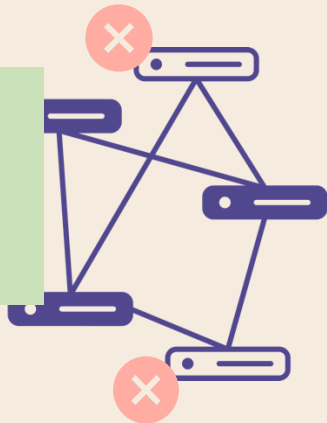
OVERNIGHT STRATEGIST

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.

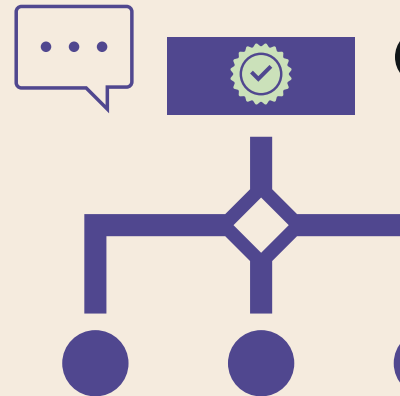


COMPLEX

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

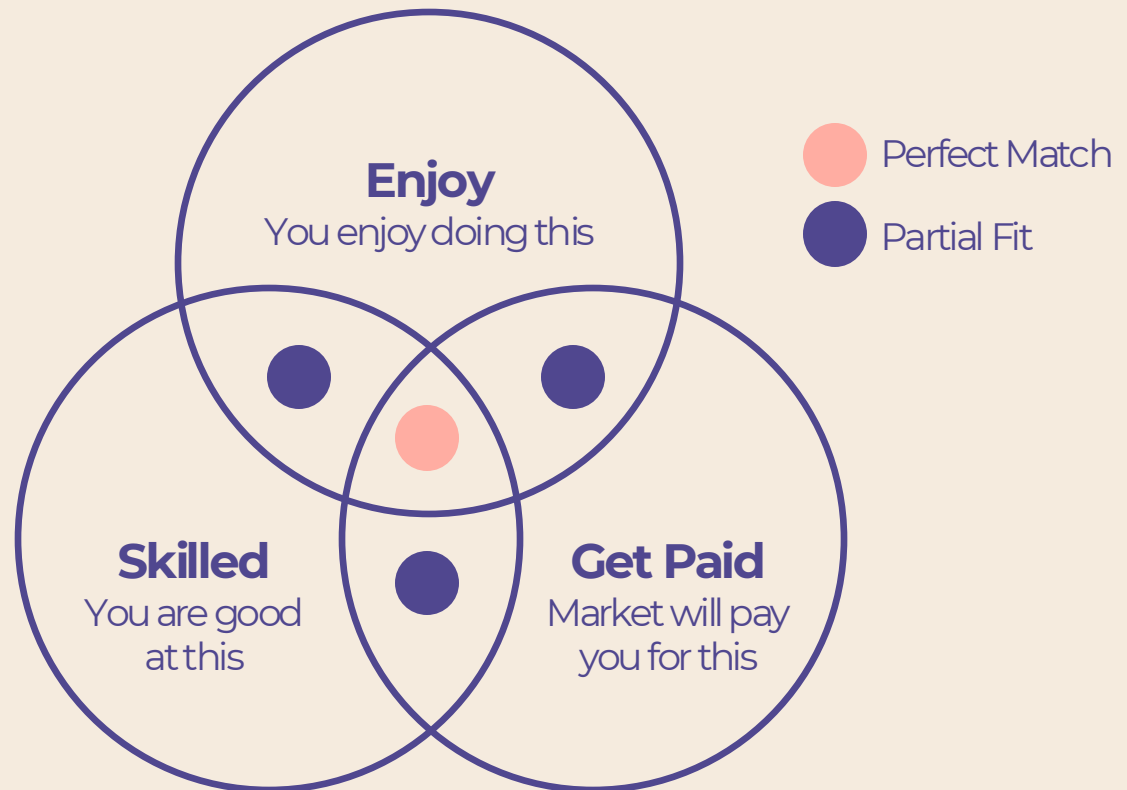
Venn

INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

'Your Purpose' Venn Diagram Example



Venn

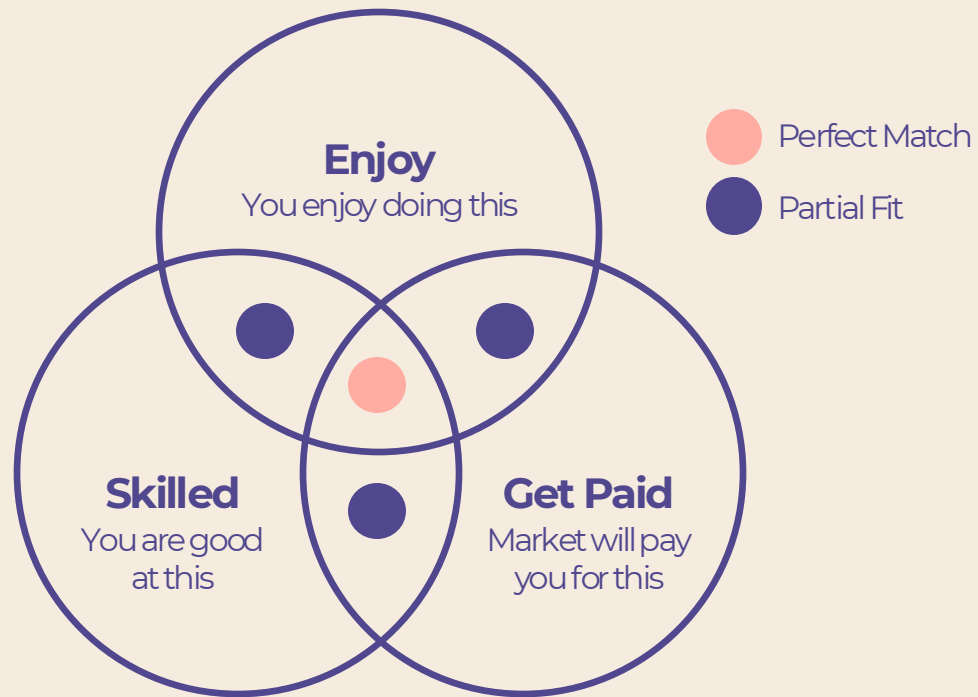
INSIGHT

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

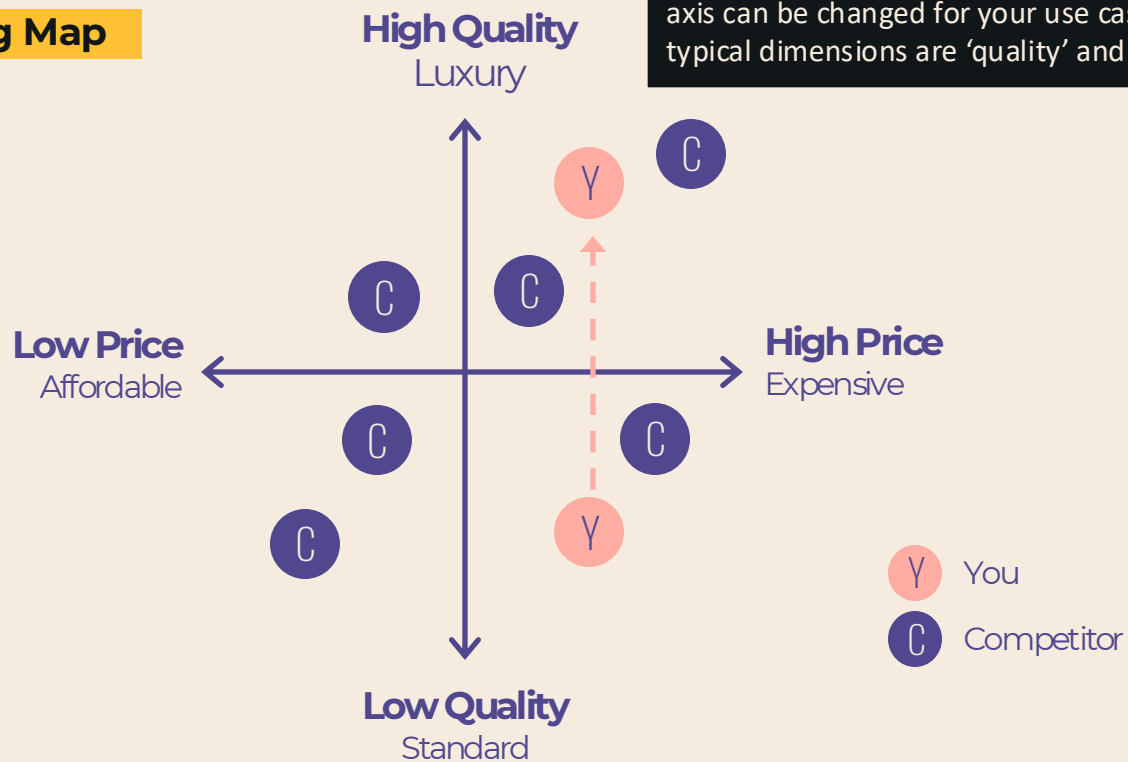
Positioning Map

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 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'.

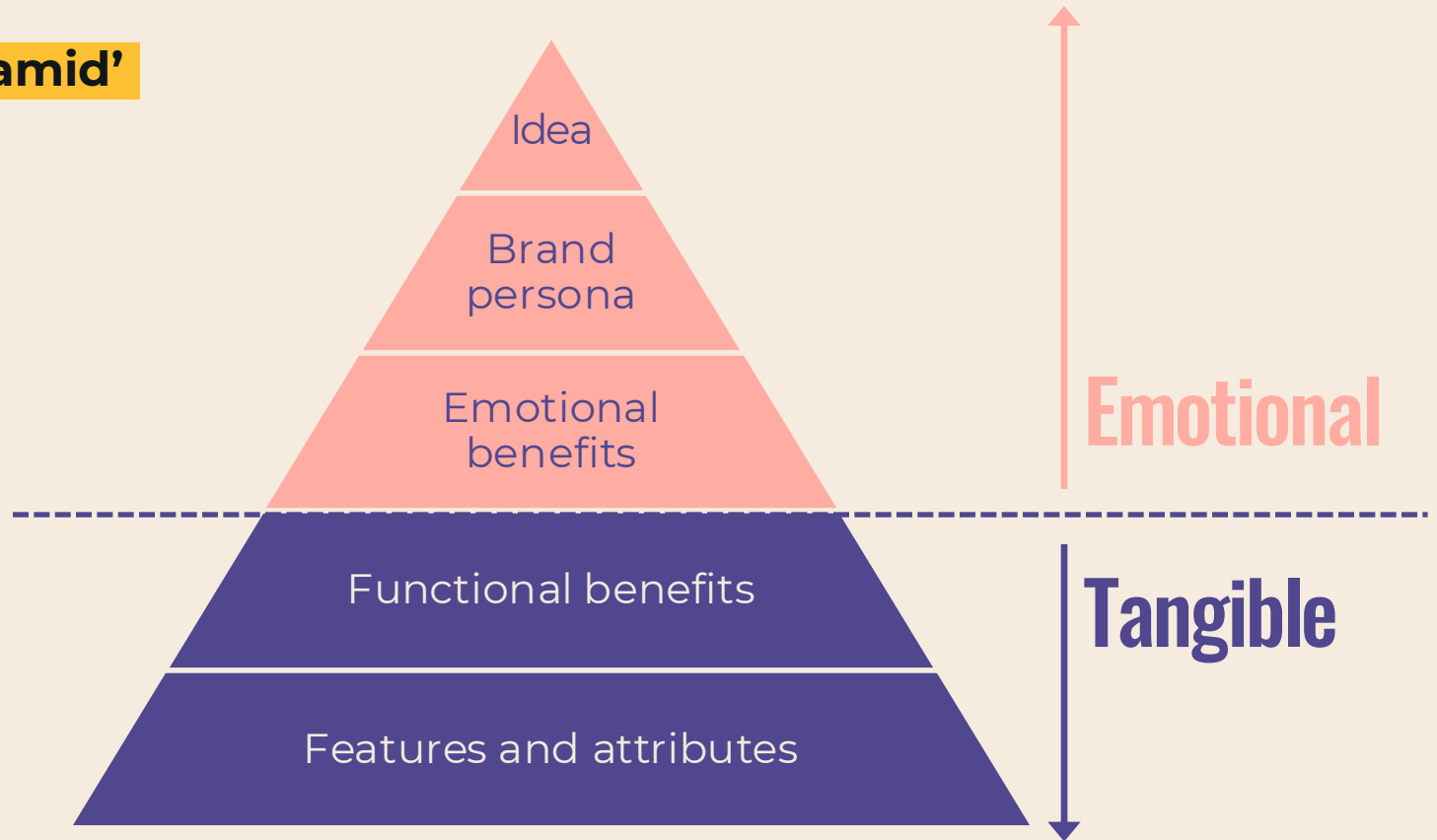
Pyramid

INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

'Brand Pyramid' Example



Ref. Brand Pyramid, Millward Brown

Pyramid

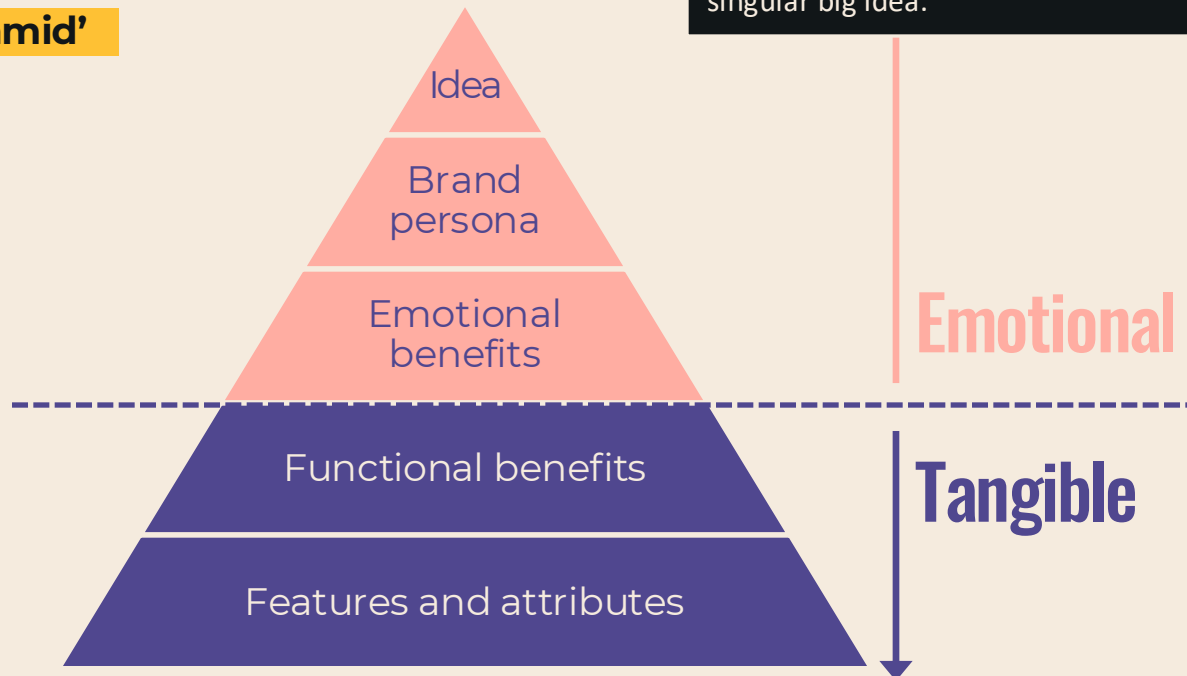
INSIGHT

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

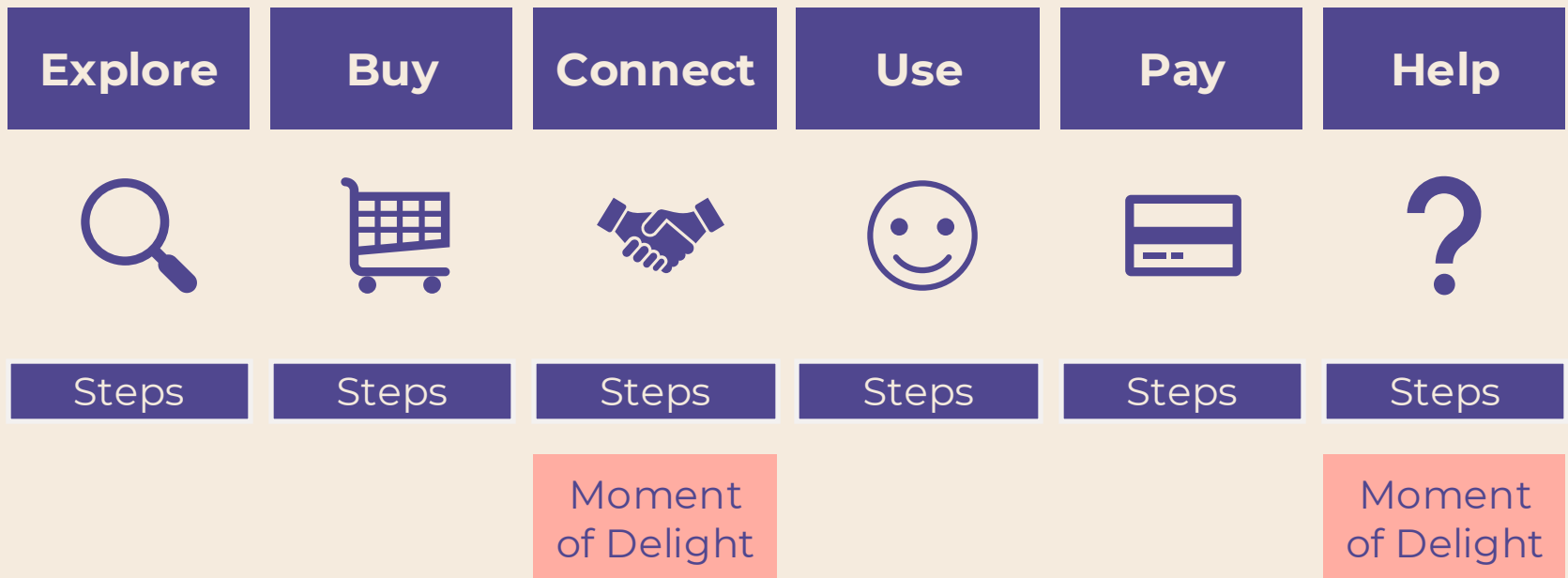
Journey

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.

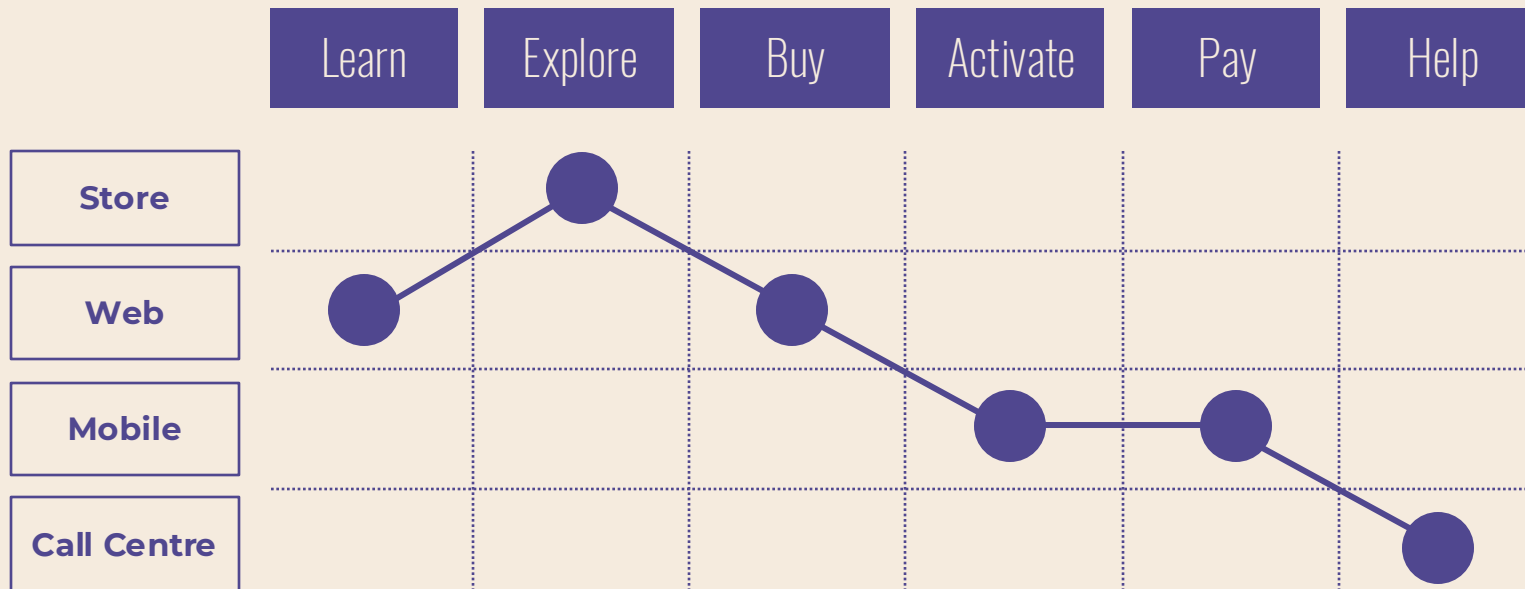
Touchpoint

INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

Multi-channel touchpoint



Touchpoint

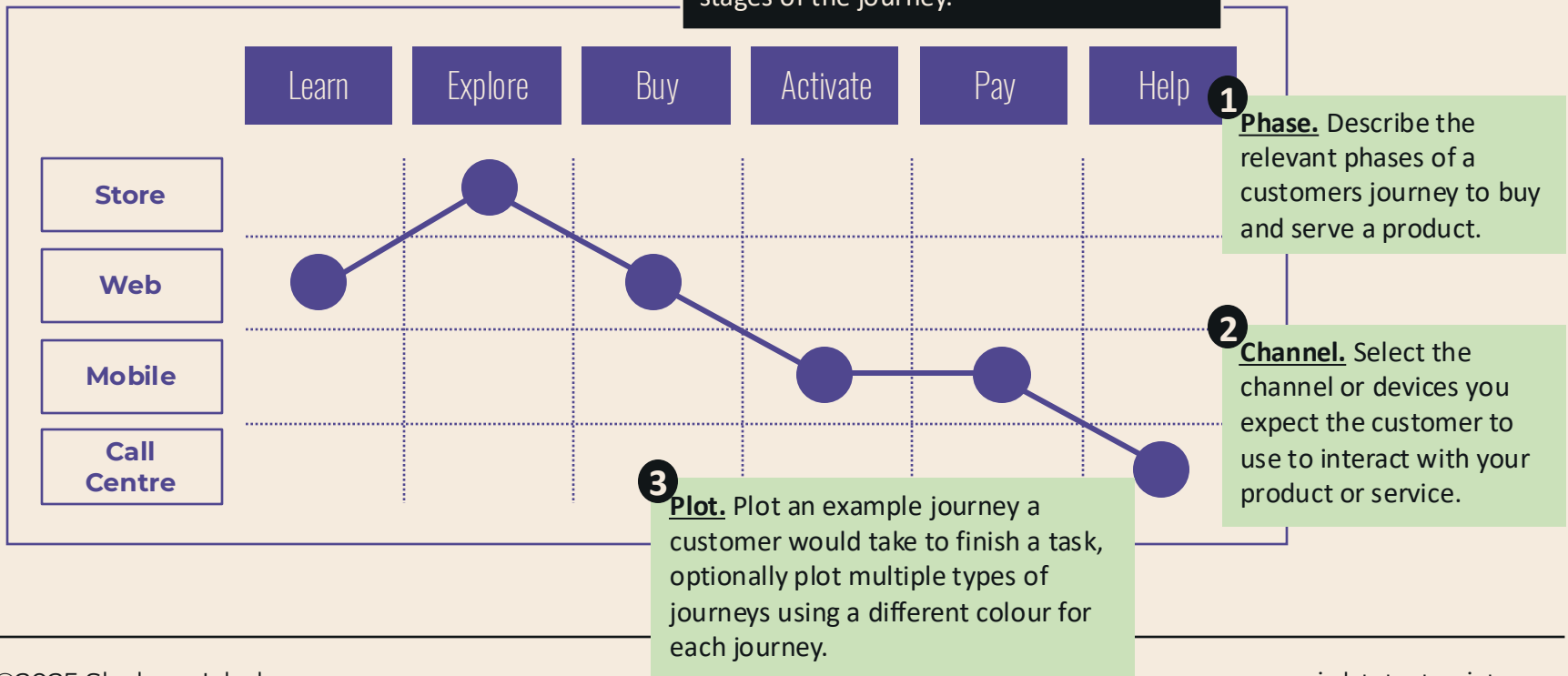
INSIGHT

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.



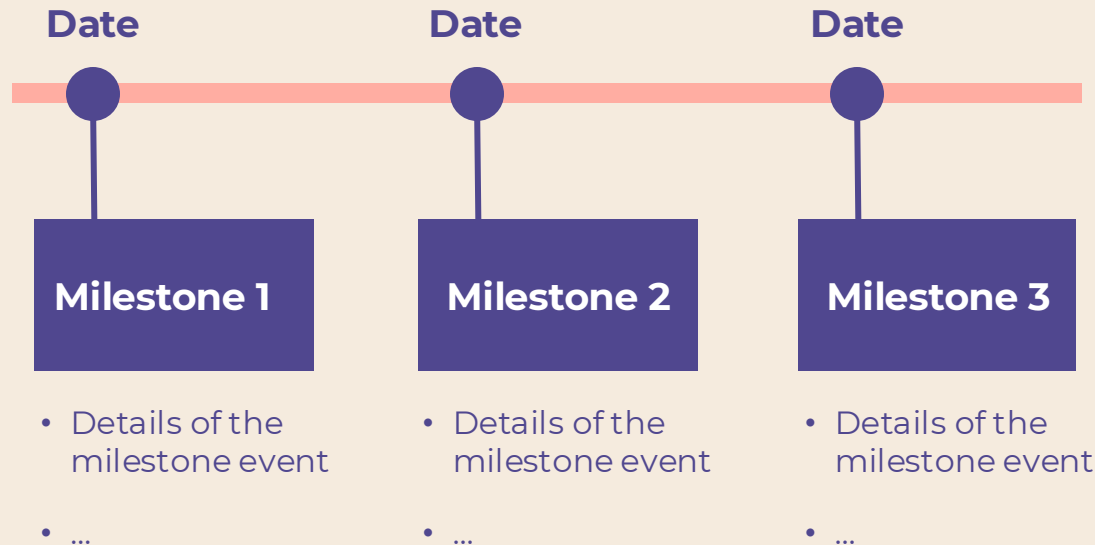
Timeline

INSIGHT

OVERNIGHT STRATEGIST

FRAMEWORK

Historical Milestones



Timeline

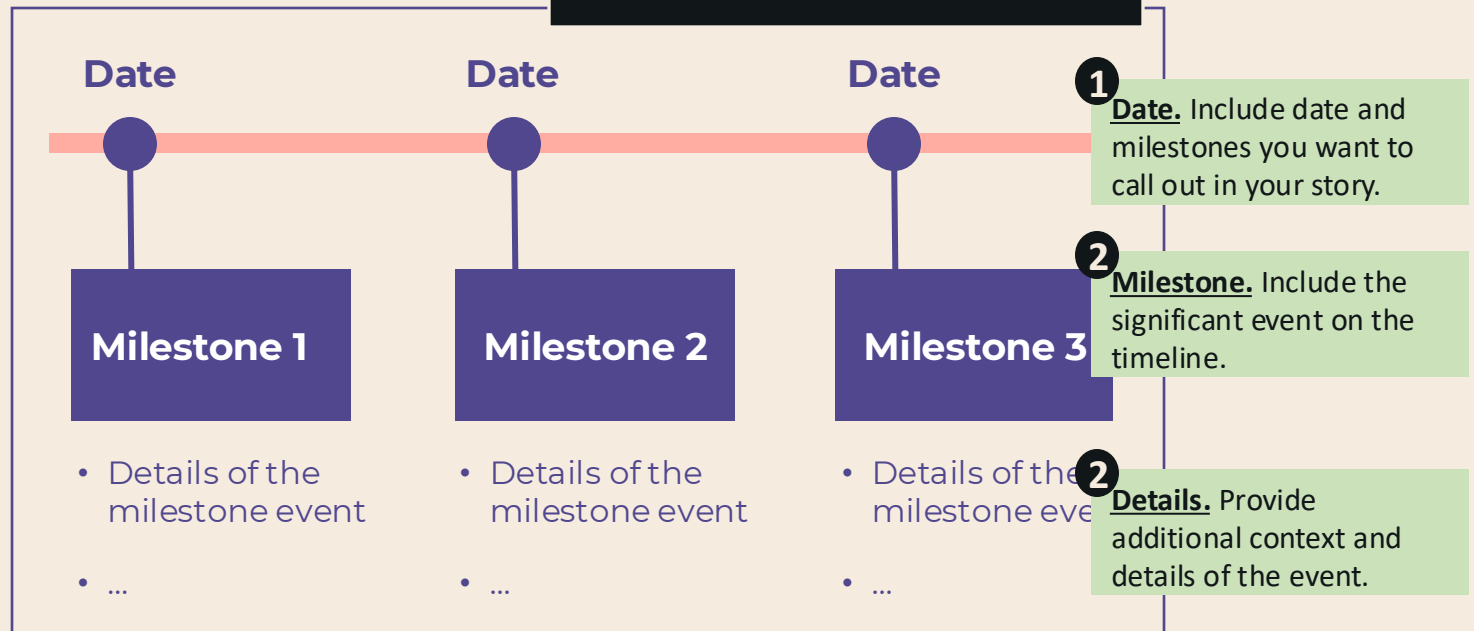
INSIGHT

OVERNIGHT STRATEGIST

INSTRUCTIONS

Historical Milestones

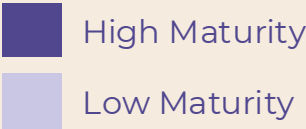
Timeline chart to visualise historical events up until current date, either horizontally or, optionally vertically.



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.

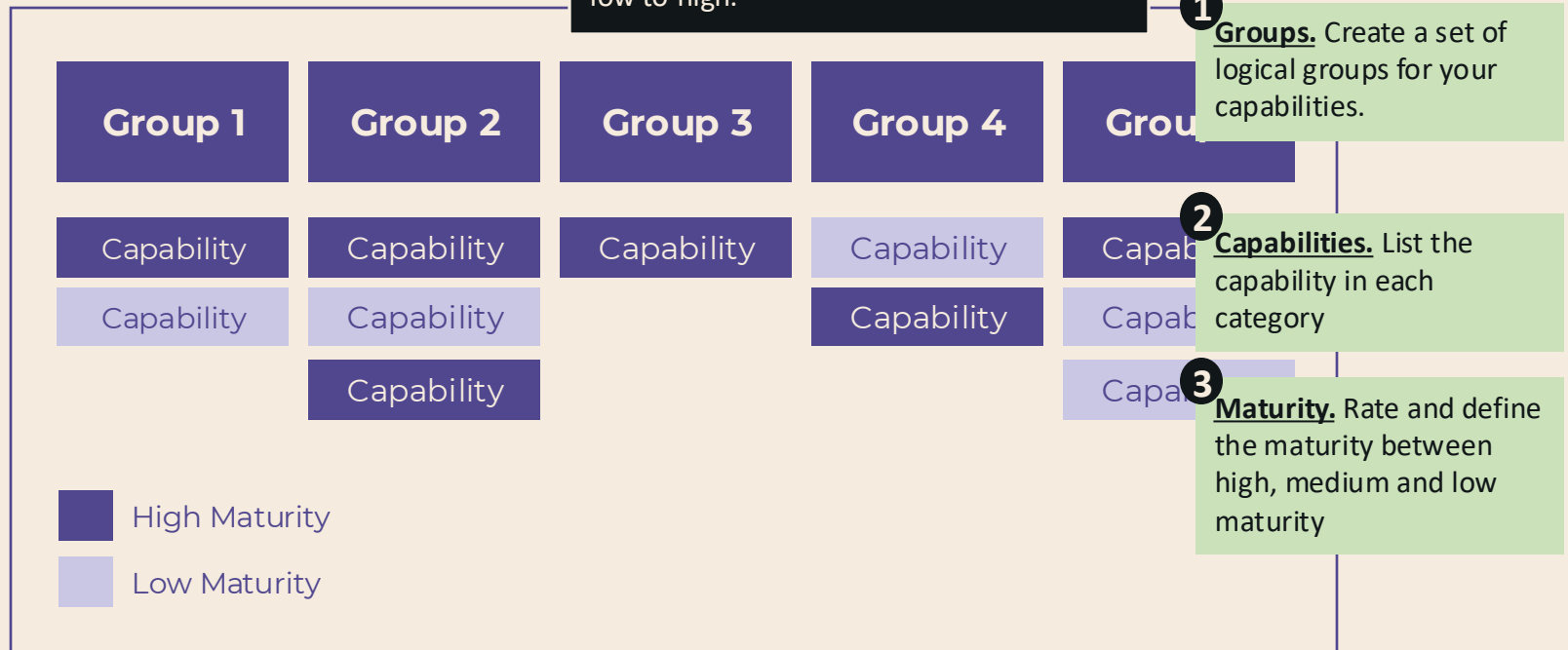


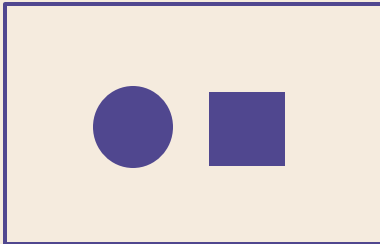
Image Column

INSIGHT

OVERNIGHT STRATEGIST

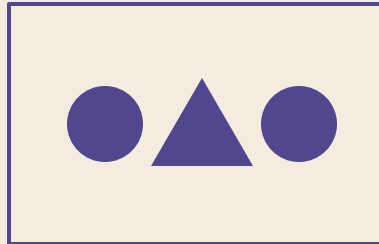
FRAMEWORK

Component 1



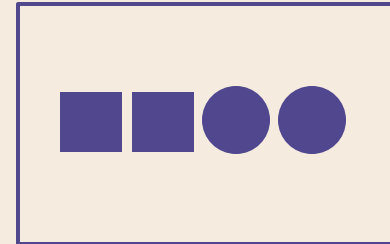
- Describe the **details of the component** and include any steps or evidence
- ...

Component 2



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

Component 3

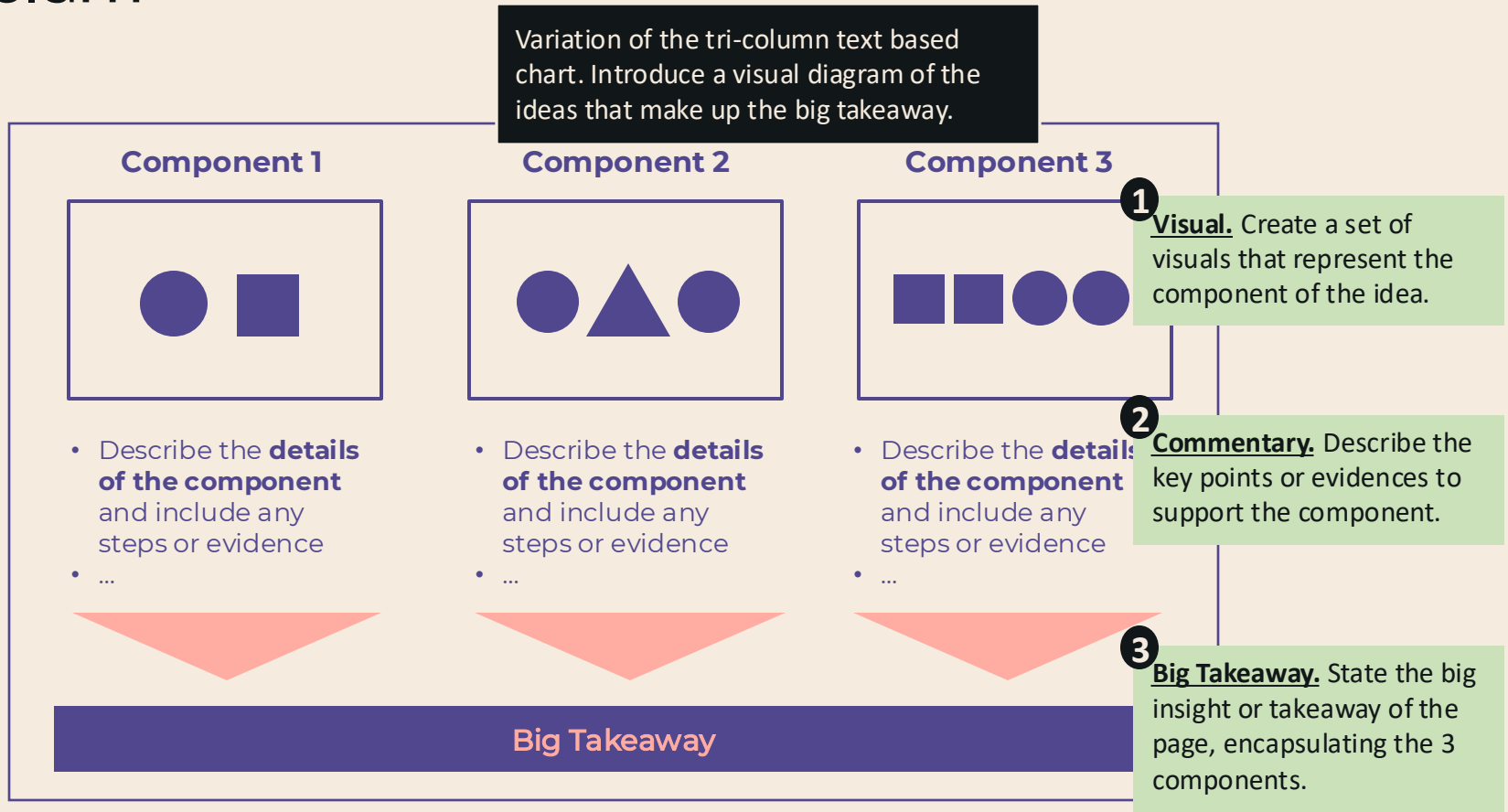


- Describe the **details of the component** and include any steps or evidence
- ...

Big Takeaway

Image Column

INSIGHT

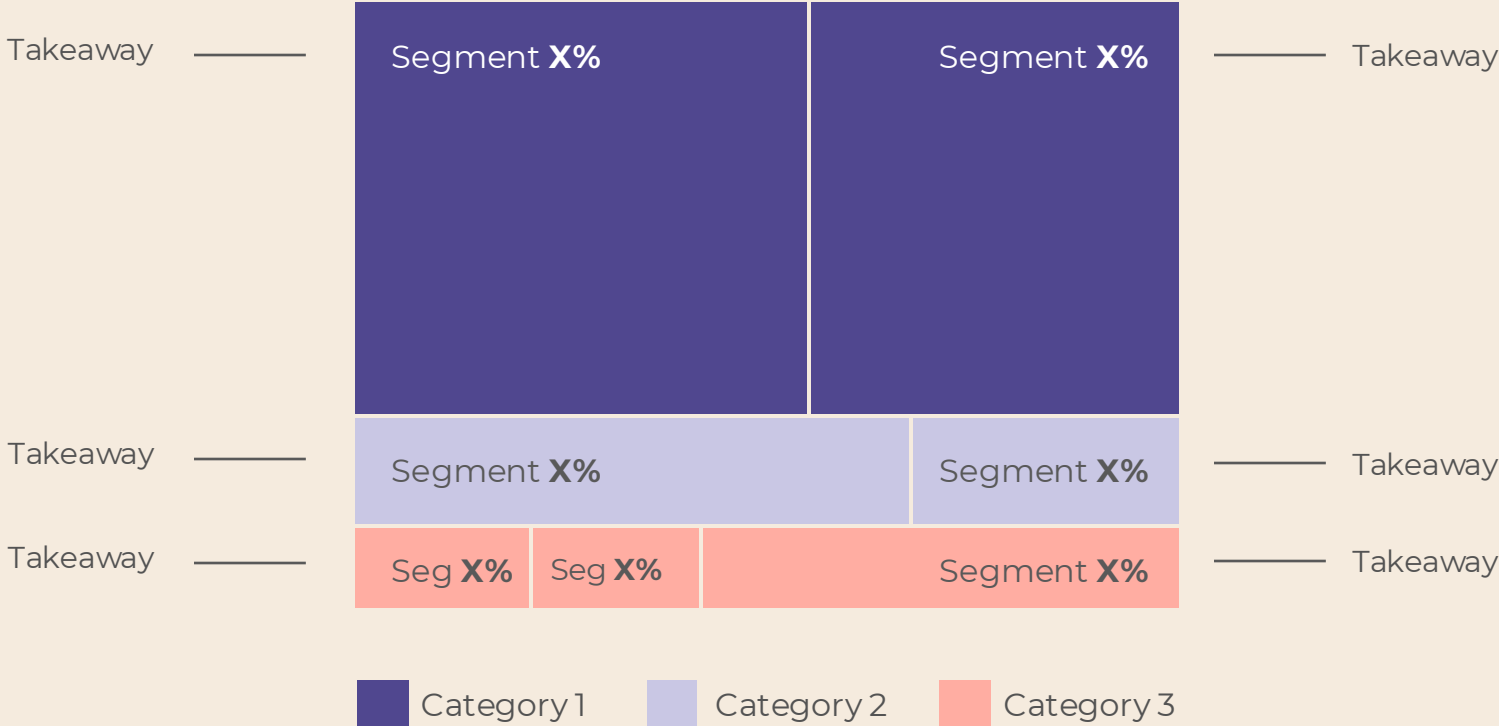


Segmentation

INSIGHT

FRAMEWORK

Market Or Customer Segments



Segmentation

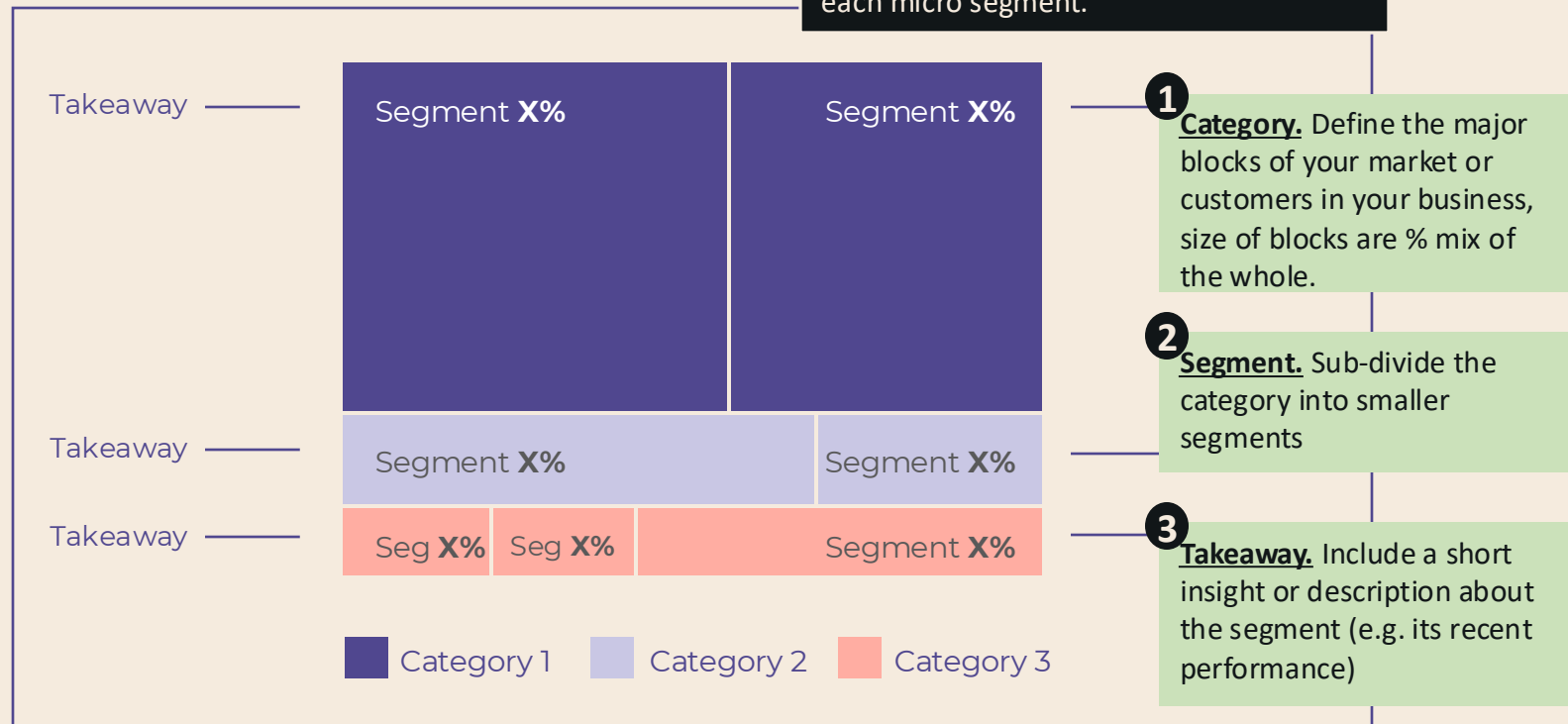
INSIGHT

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

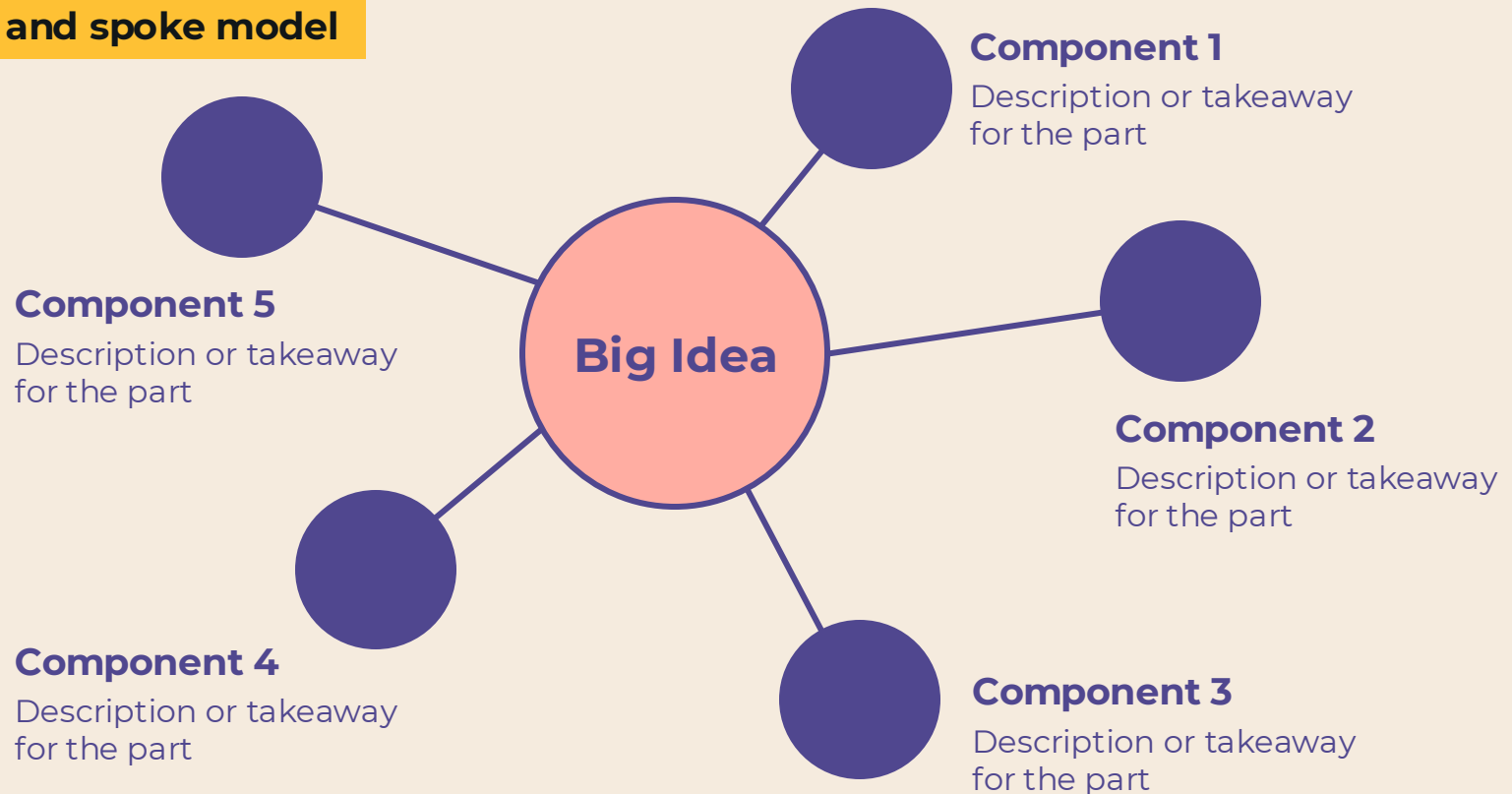
OVERNIGHT STRATEGIST

FRAMEWORK

+

INSTRUCTIONS

Hub and spoke model



3x3 Model

INSIGHT

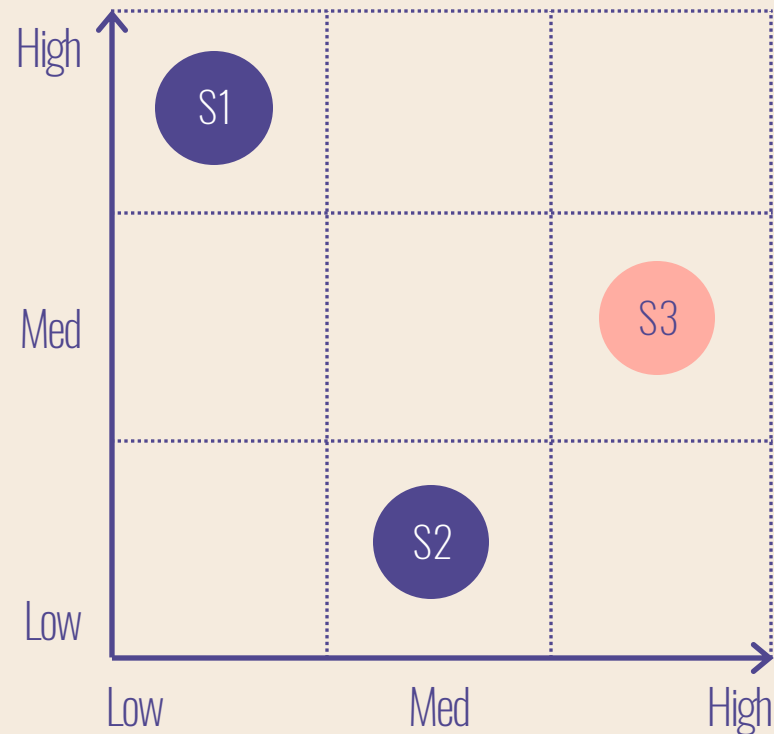
OVERNIGHT STRATEGIST

FRAMEWORK

**Segment
Assessment**

Ability To Win

eg. competition, value
prop, capability



Ref. Inspired by the classic GE-McKinsey Matrix

Segment Attractiveness

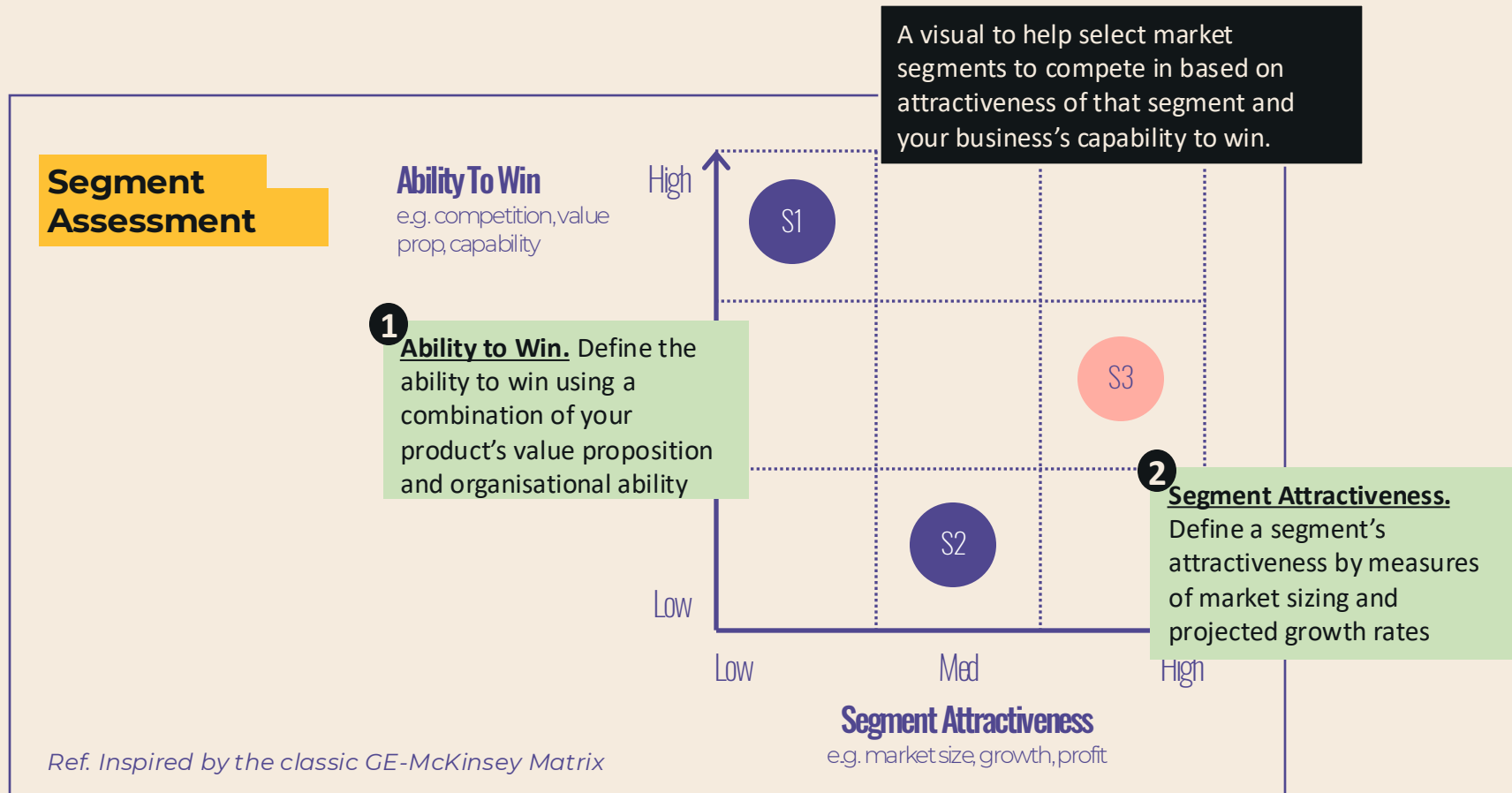
eg. market size, growth, profit

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

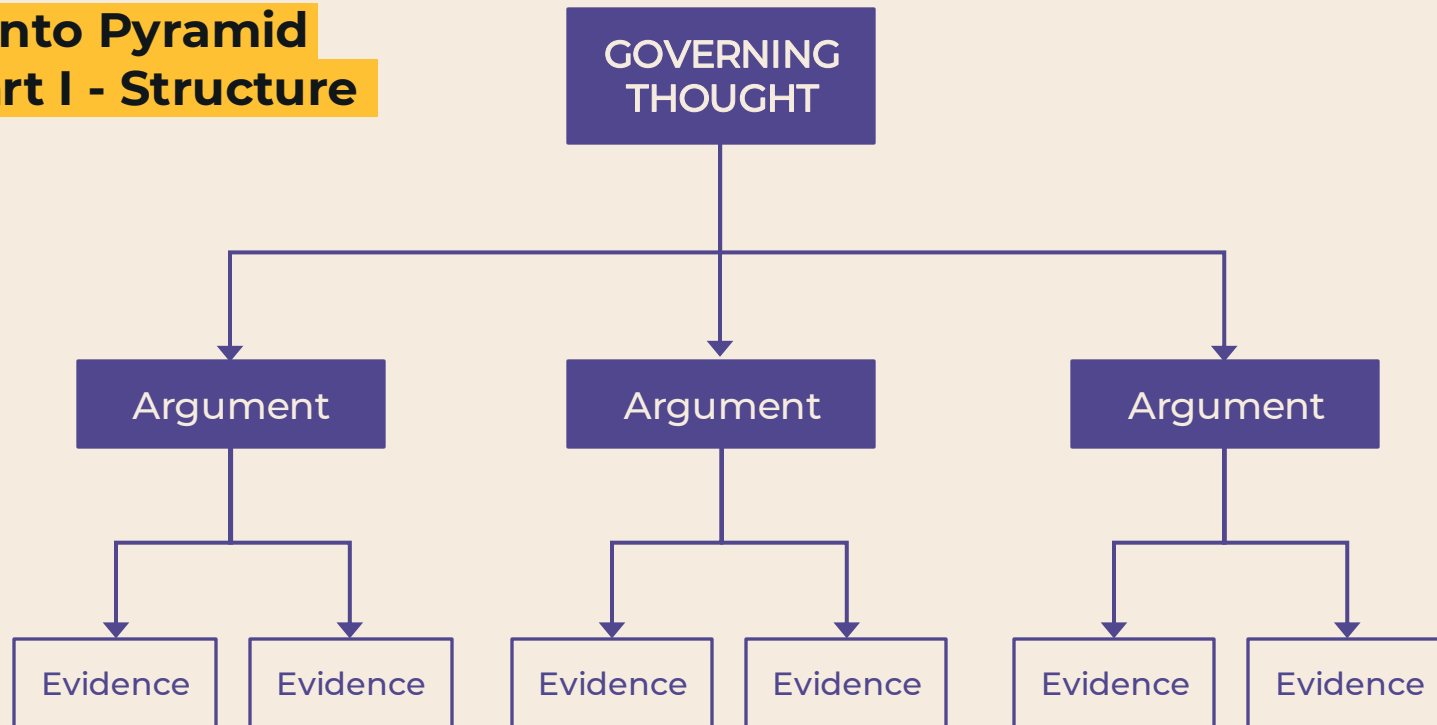
Minto Pyramid

STORY

OVERNIGHT STRATEGIST

FRAMEWORK

Minto Pyramid Part I - Structure



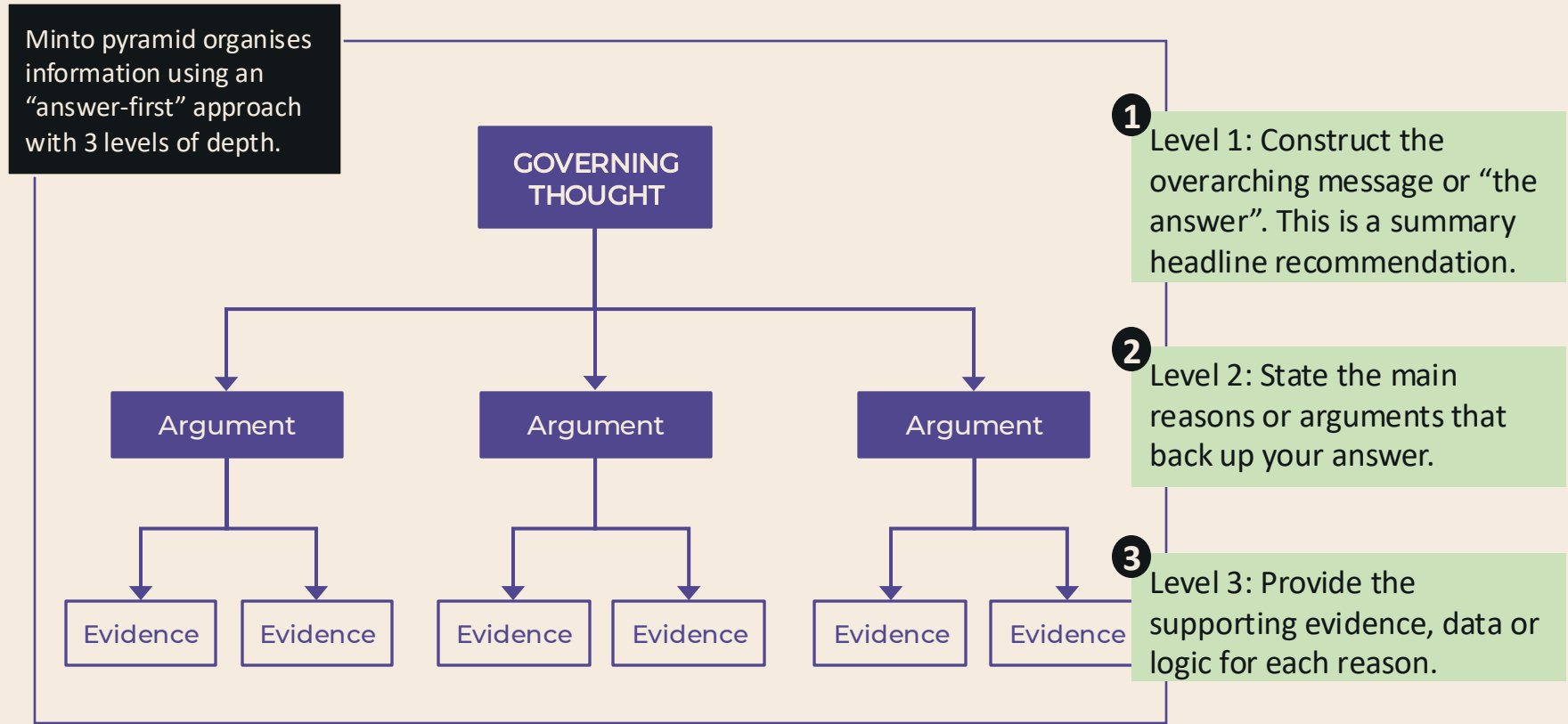
Ref. Barbara Minto, The Minto Pyramid Principle

Minto Pyramid

STORY

OVERNIGHT STRATEGIST

INSTRUCTIONS



HV Logic

STORY

OVERNIGHT STRATEGIST

FRAMEWORK

+

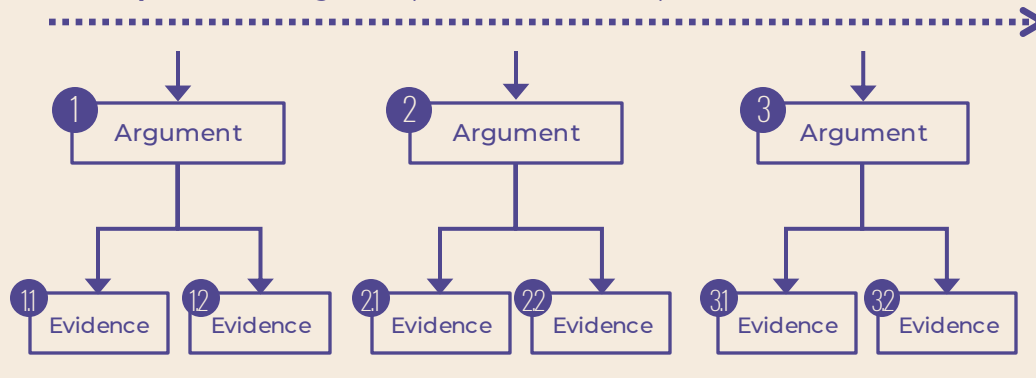
INSTRUCTIONS

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

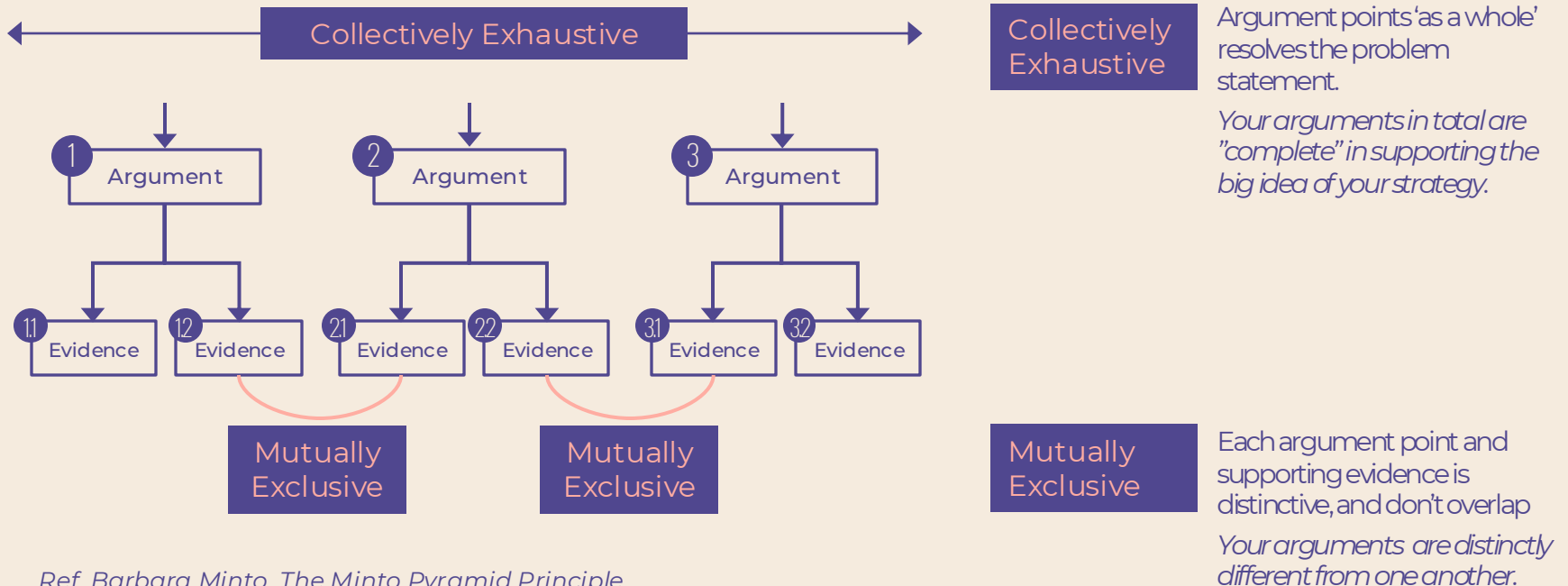
OVERNIGHT STRATEGIST

FRAMEWORK

+

INSTRUCTIONS

Minto Pyramid Part III – Mutually Exclusive, Collectively Exhaustive



Ref. Barbara Minto, The Minto Pyramid Principle

SCQA

STORY

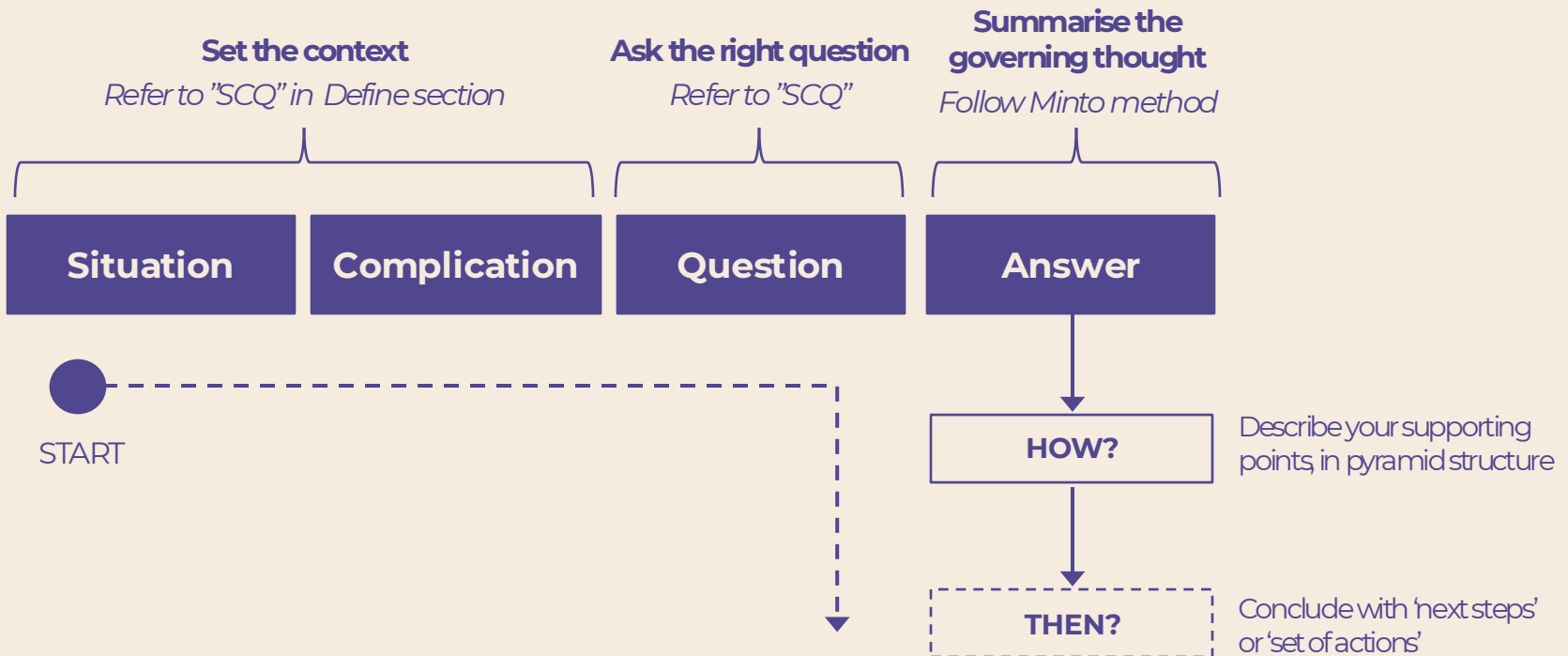
OVERNIGHT STRATEGIST

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

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

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



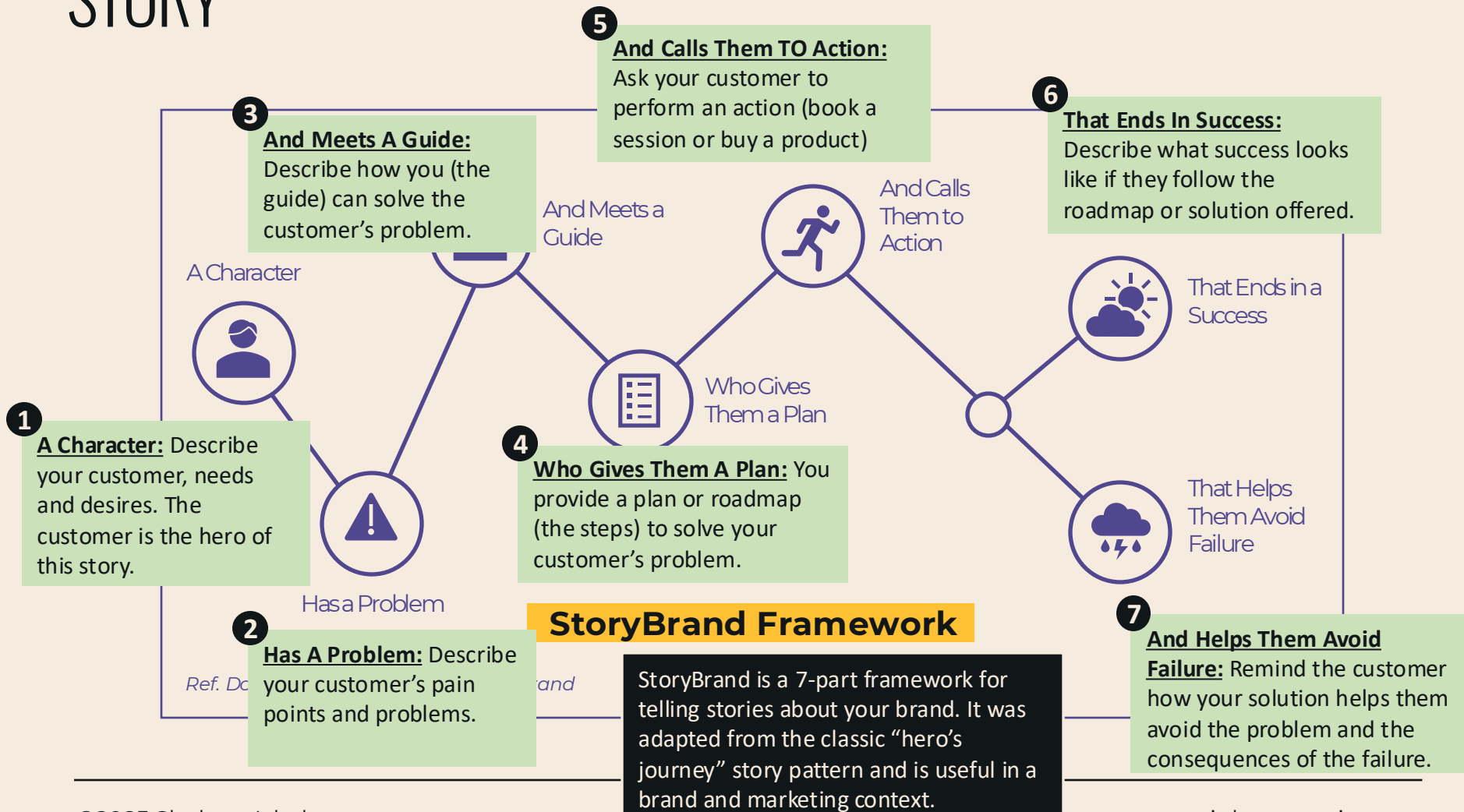
Ref. Donald Miller, Building a Story Brand

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

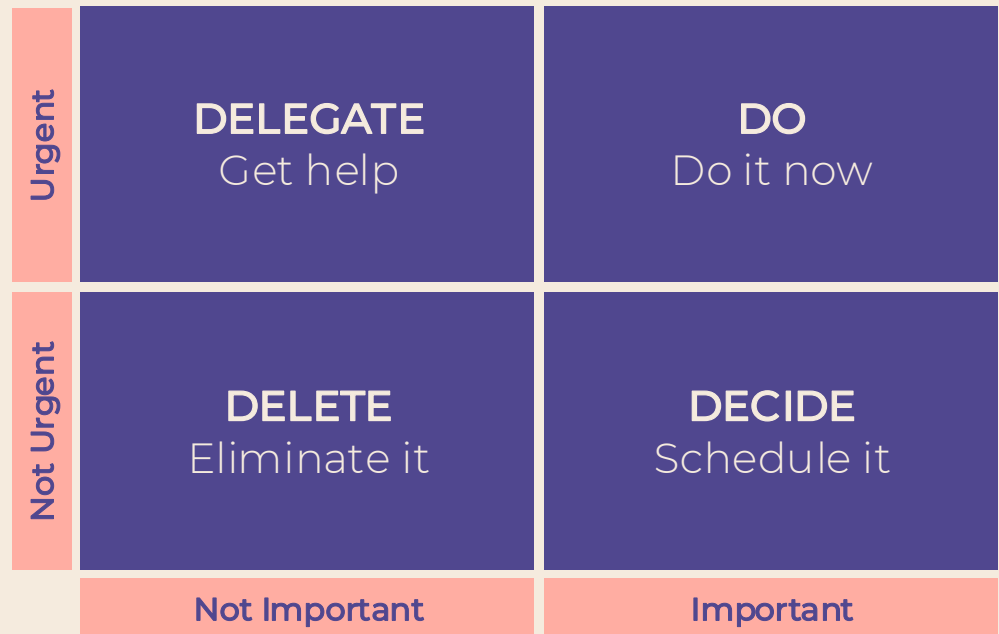
DECIDE

OVERNIGHT STRATEGIST

FRAMEWORK

Eisenhower Box – Mental Model

How time critical
is the issue?



How important is the issue?

Eisenhower

DECIDE

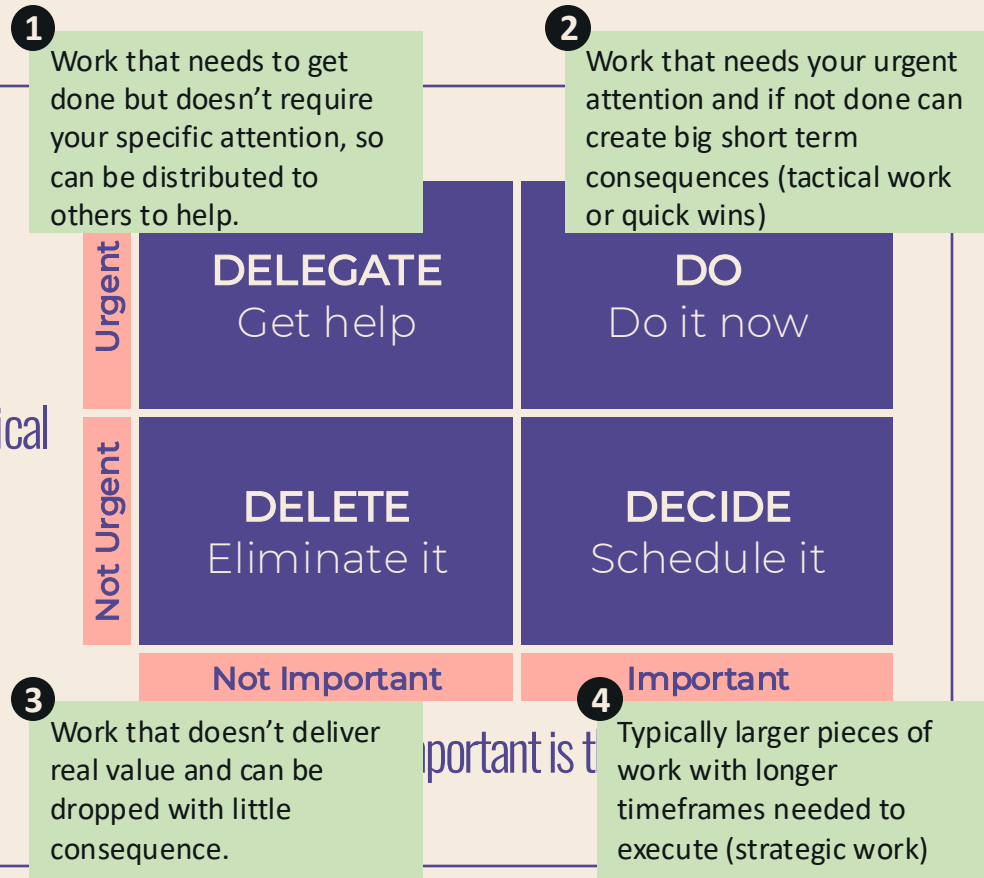
OVERNIGHT STRATEGIST

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

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

Level of Familiarity

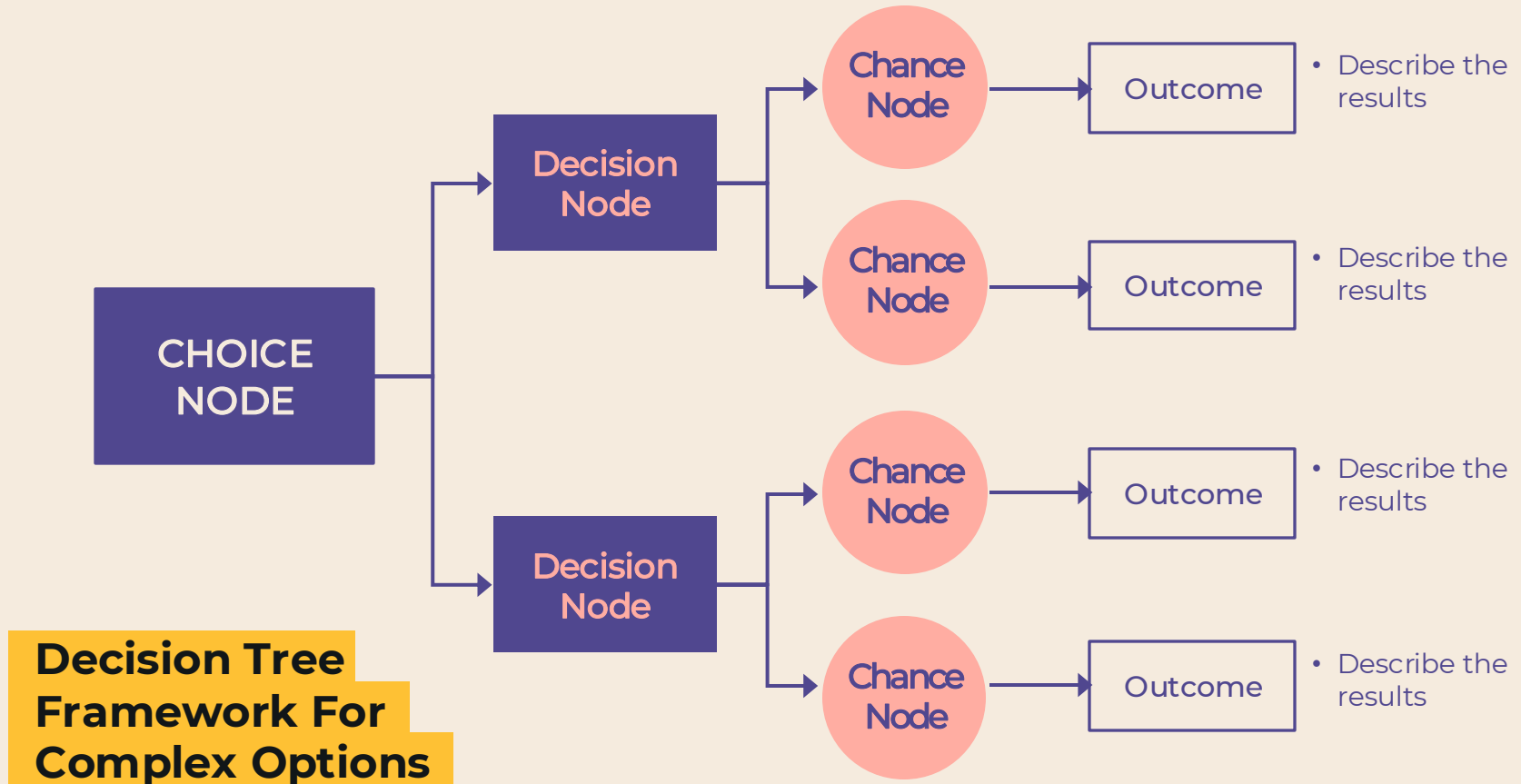
Ref. McKinsey, Organisational Decision Making Framework

Decision Tree

DECIDE

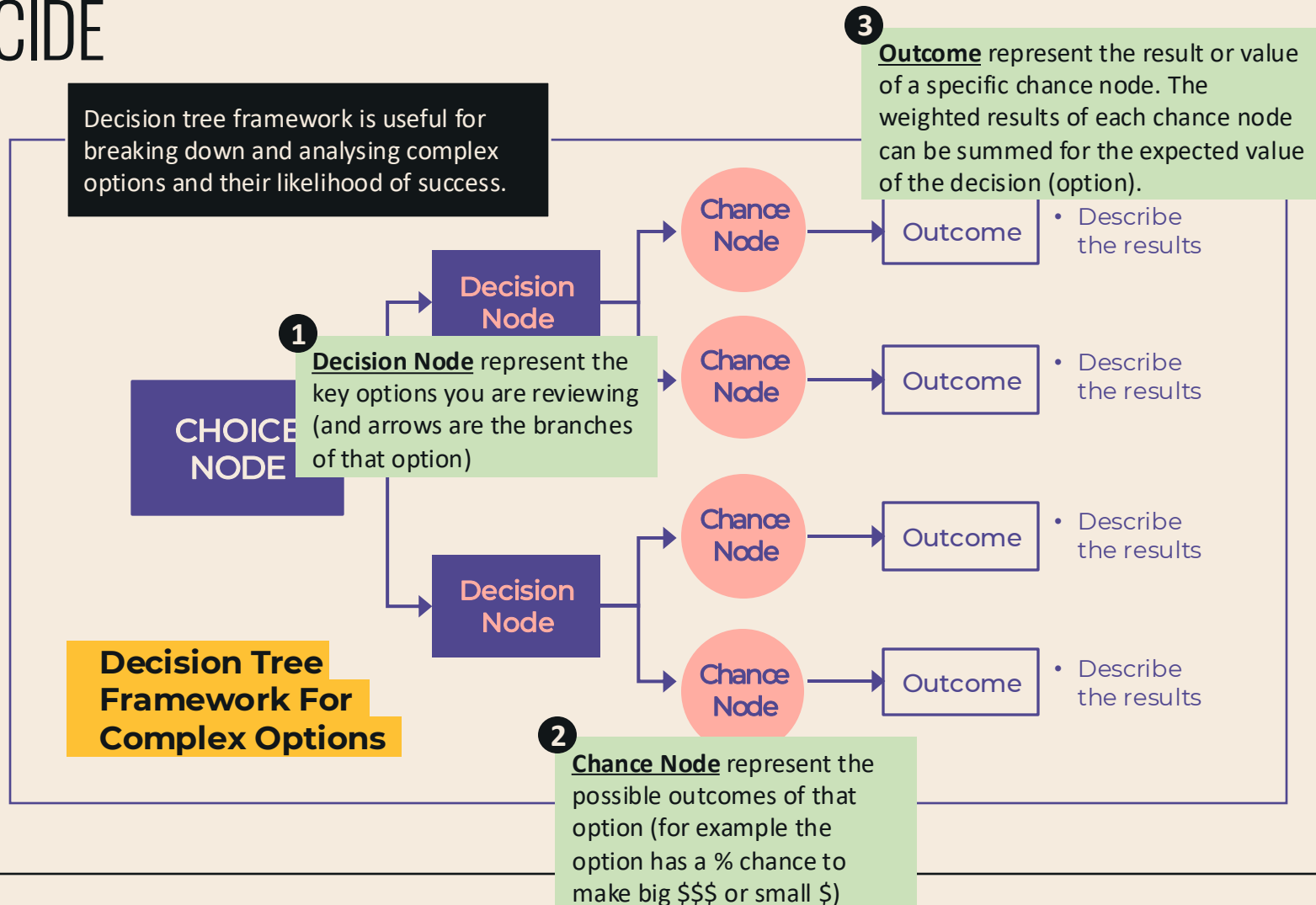
OVERNIGHT STRATEGIST

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">• Describe the positives or useful features• ...• ...	<div>Recommended</div> <ul style="list-style-type: none">• Describe the positives or useful features• ...• ...	<ul style="list-style-type: none">• Describe the positives or useful features• ...• ...
Cons	<ul style="list-style-type: none">• Describe the negatives or limitations• ...• ...	<ul style="list-style-type: none">• Describe the negatives or limitations• ...• ...	<ul style="list-style-type: none">• Describe the negatives or limitations• ...• ...
	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

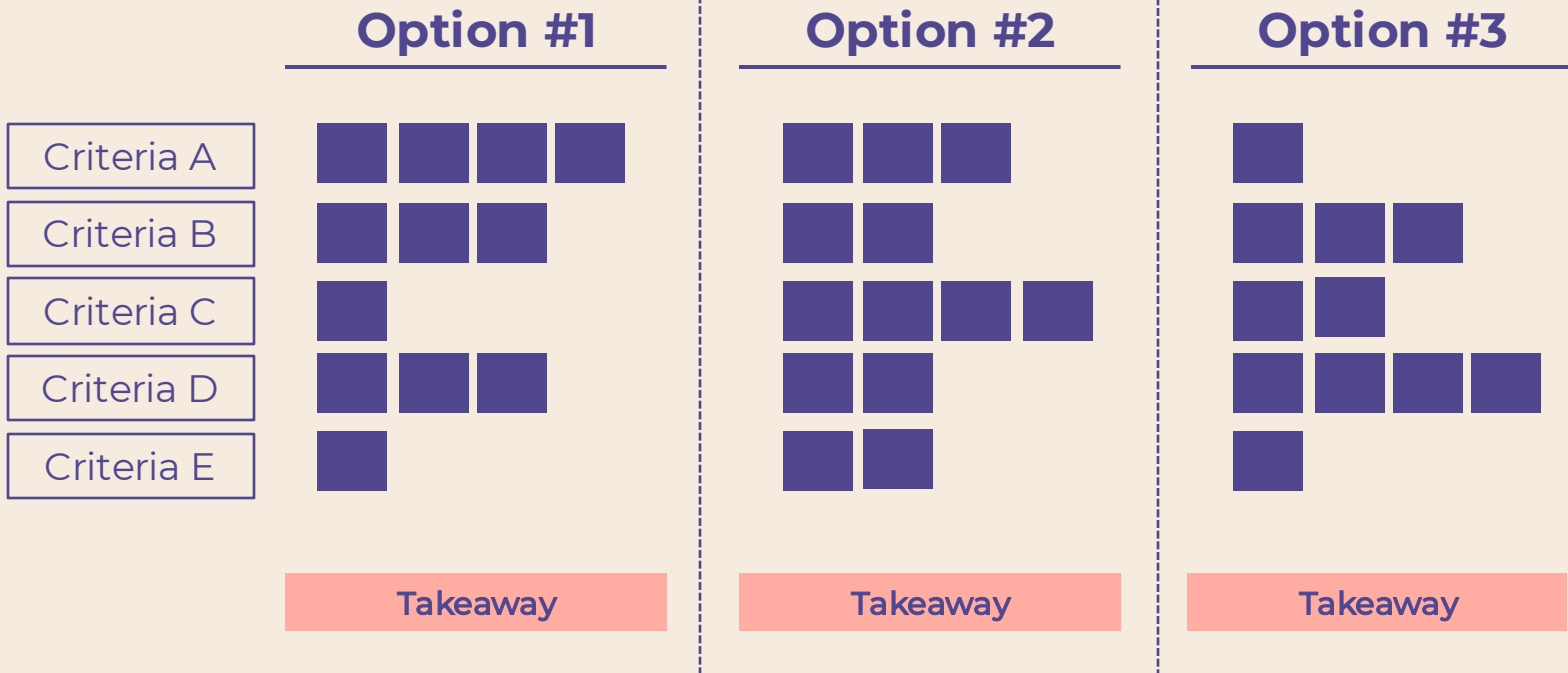
Evaluation

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>
Criteria B	<div></div>	<div></div>	<div></div>
Criteria C	<div></div>	<div></div>	<div></div>
Criteria D	<div></div>	<div></div>	<div></div>
Criteria E	<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

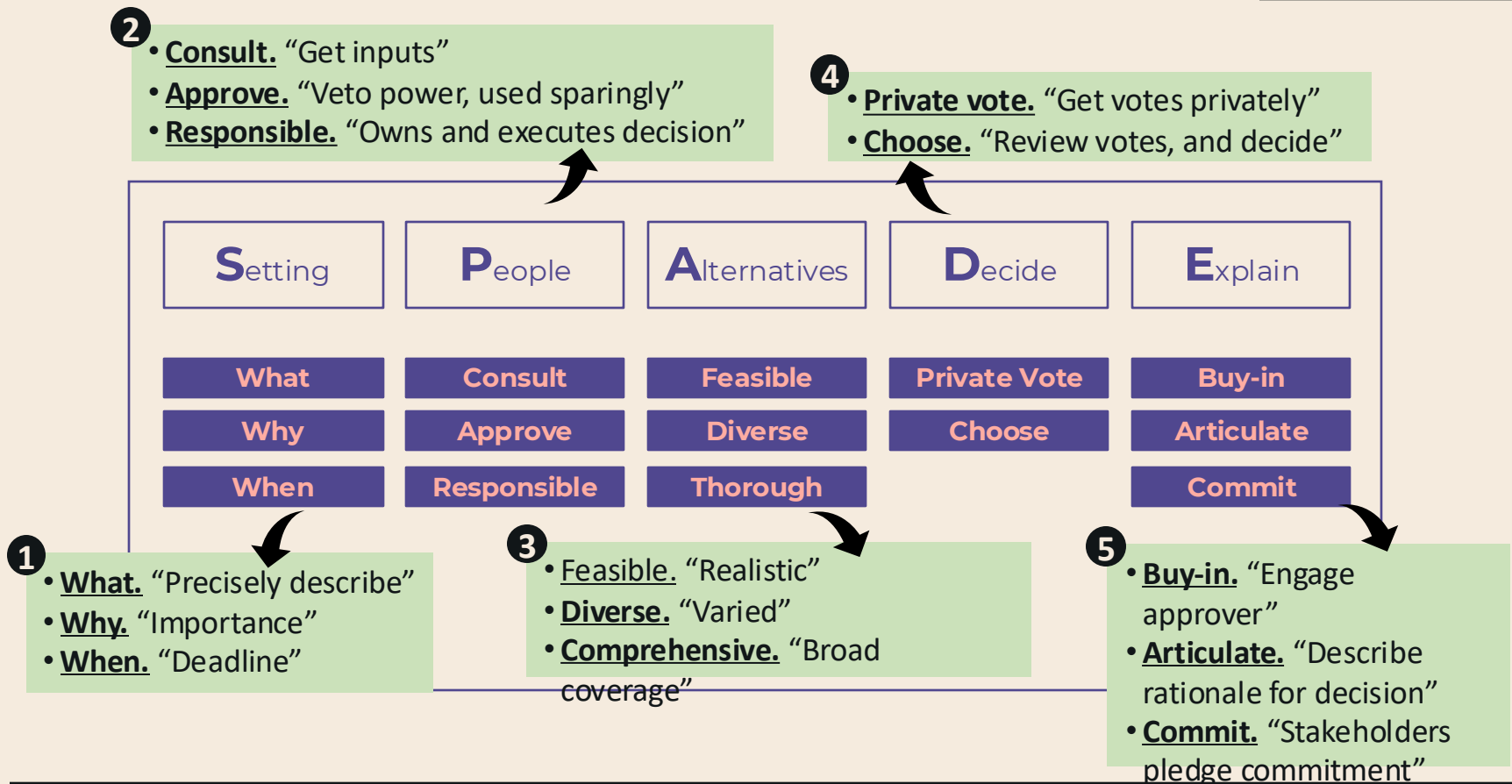
SPADE

DECIDE

OVERNIGHT STRATEGIST

FRAMEWORK

Framework for
difficult decisions
used at Square



Bull & Bear

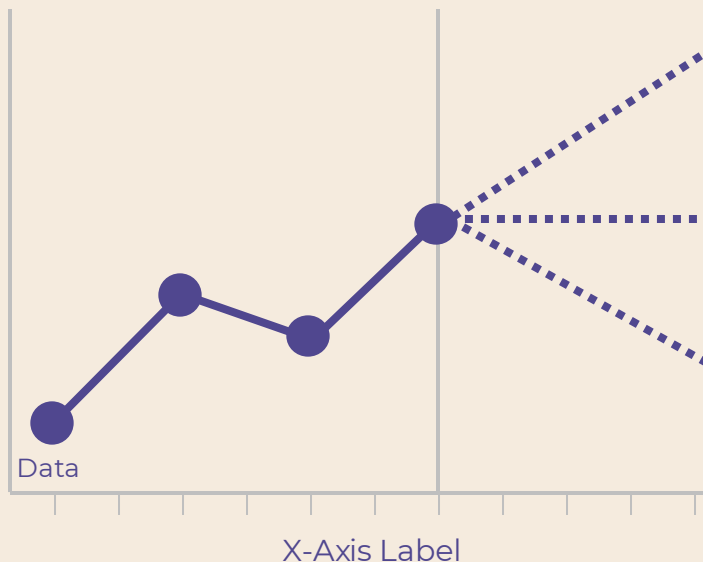
DECIDE

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

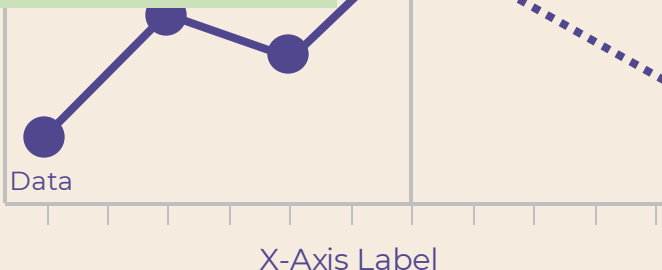
ANALYSE

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)



Bull

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

Base

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

Bear

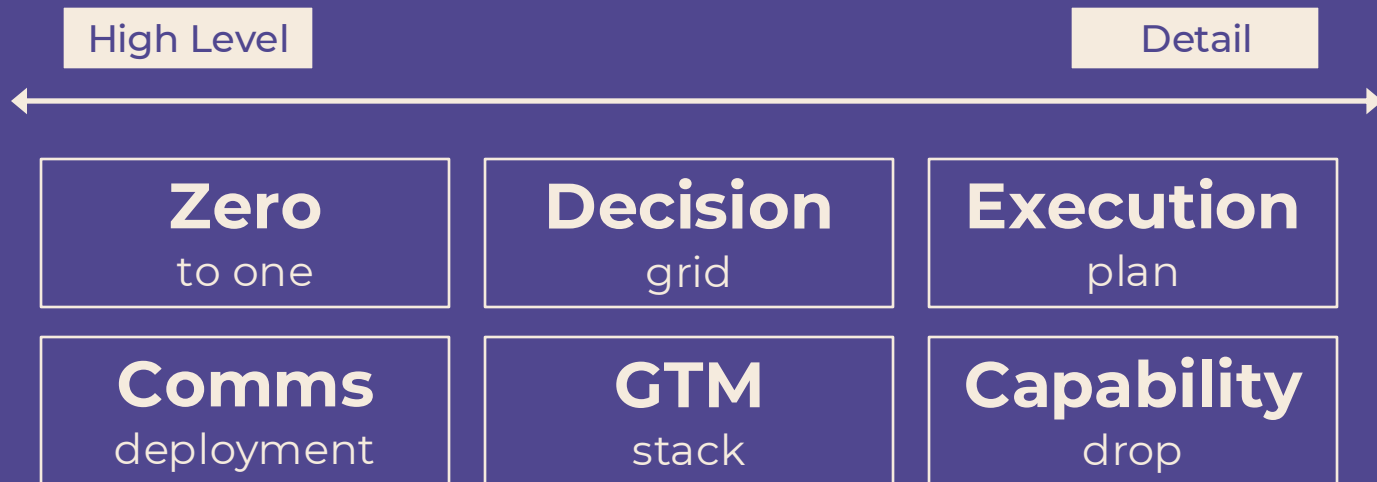
- Worse case scenario if things go horribly wrong in the "bear case"

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

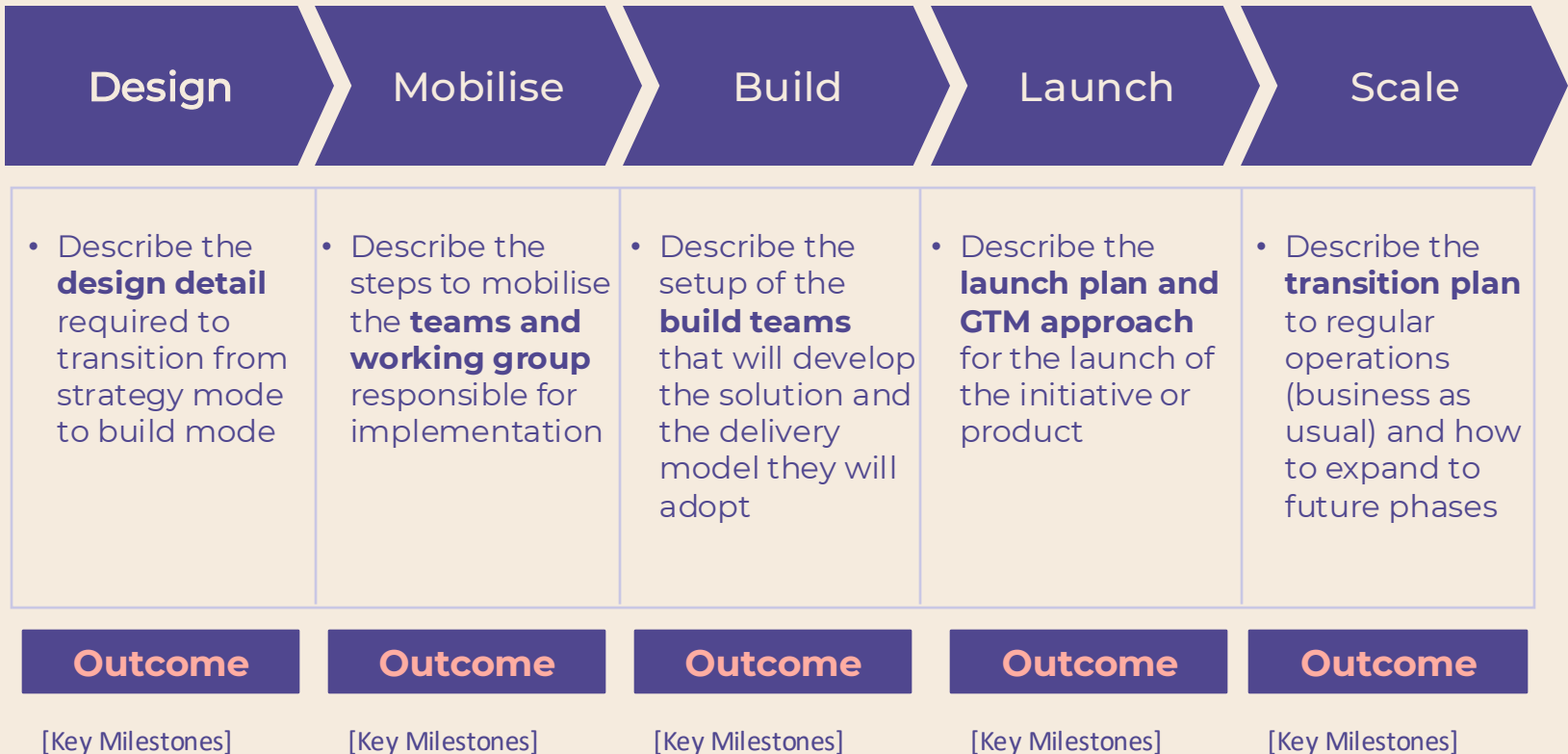
OVERNIGHT STRATEGIST

FRAMEWORK

+

INSTRUCTIONS

Getting from start line to launch



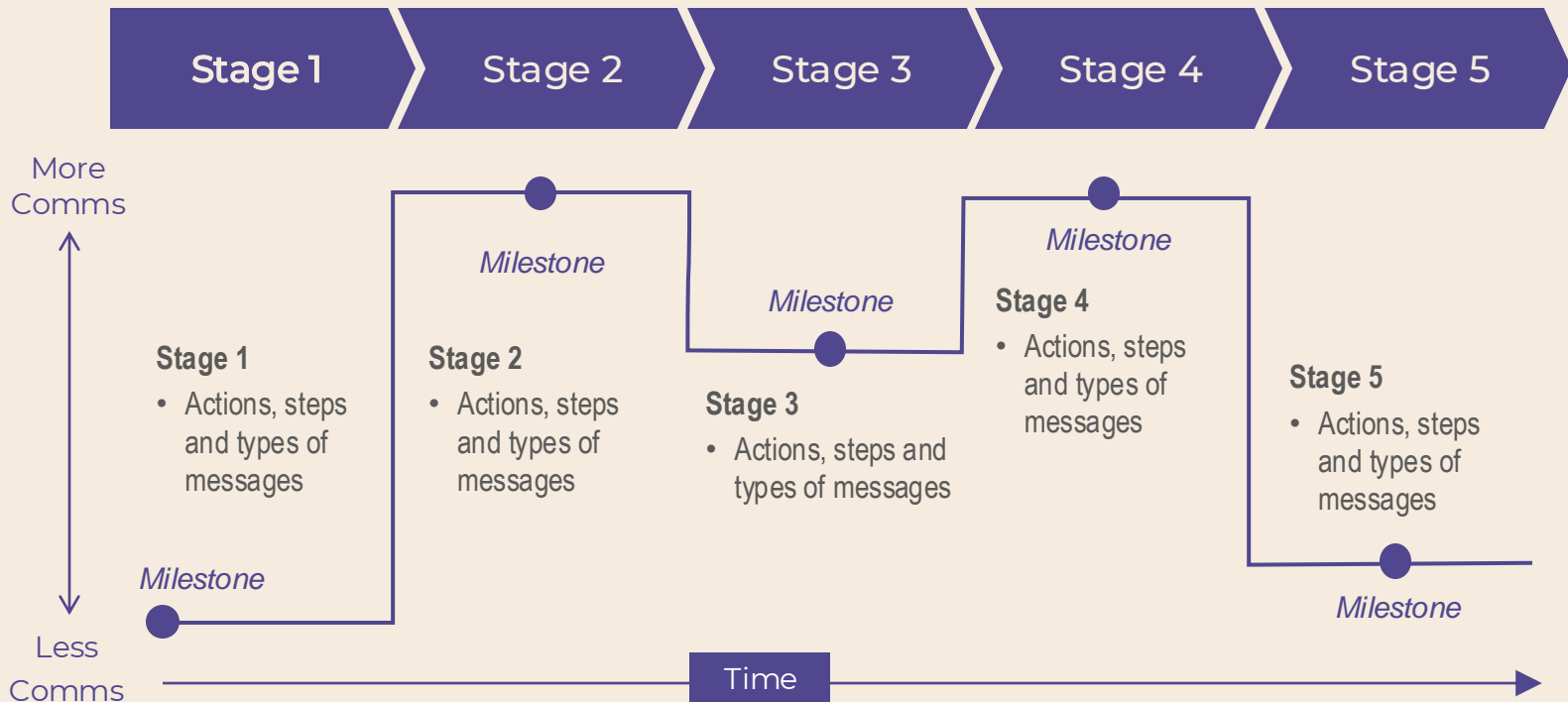
Comms Deploy

Act

OVERNIGHT STRATEGIST

FRAMEWORK

Communications deployment plan

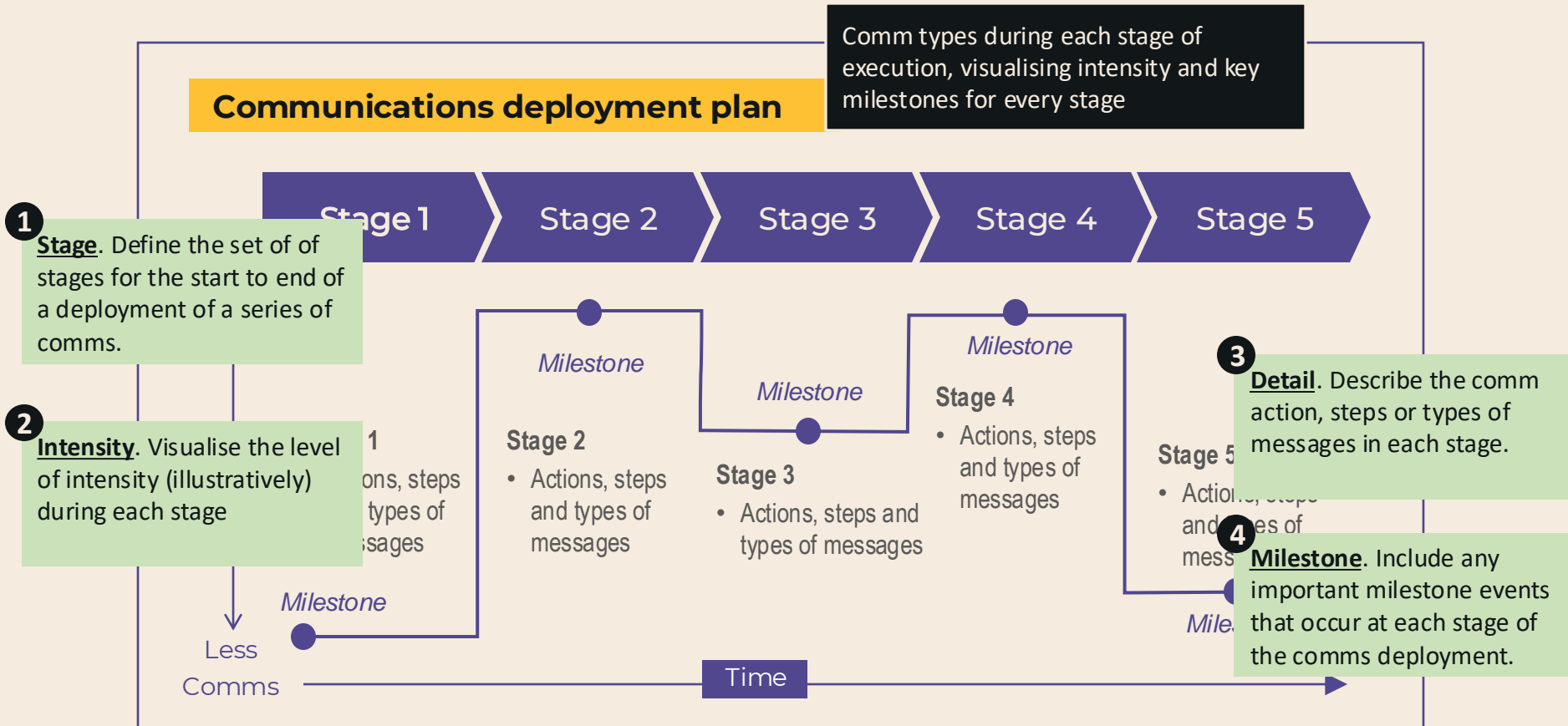


Comms Deploy

Act

OVERNIGHT STRATEGIST

INSTRUCTIONS



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

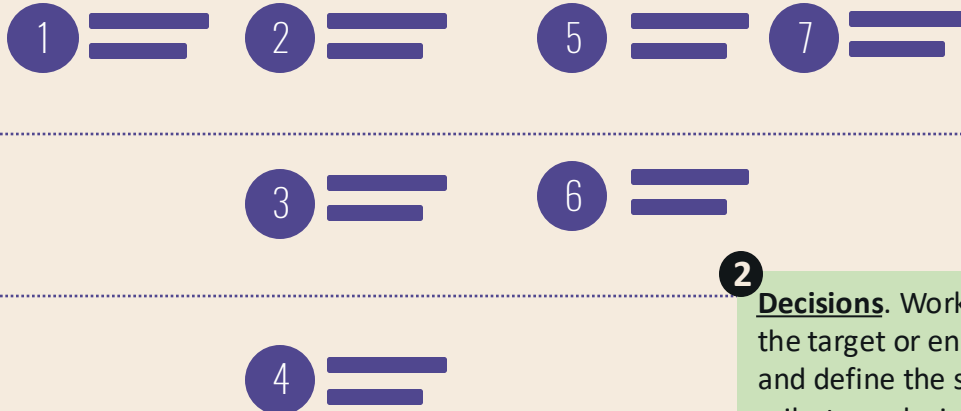
Week 4

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.

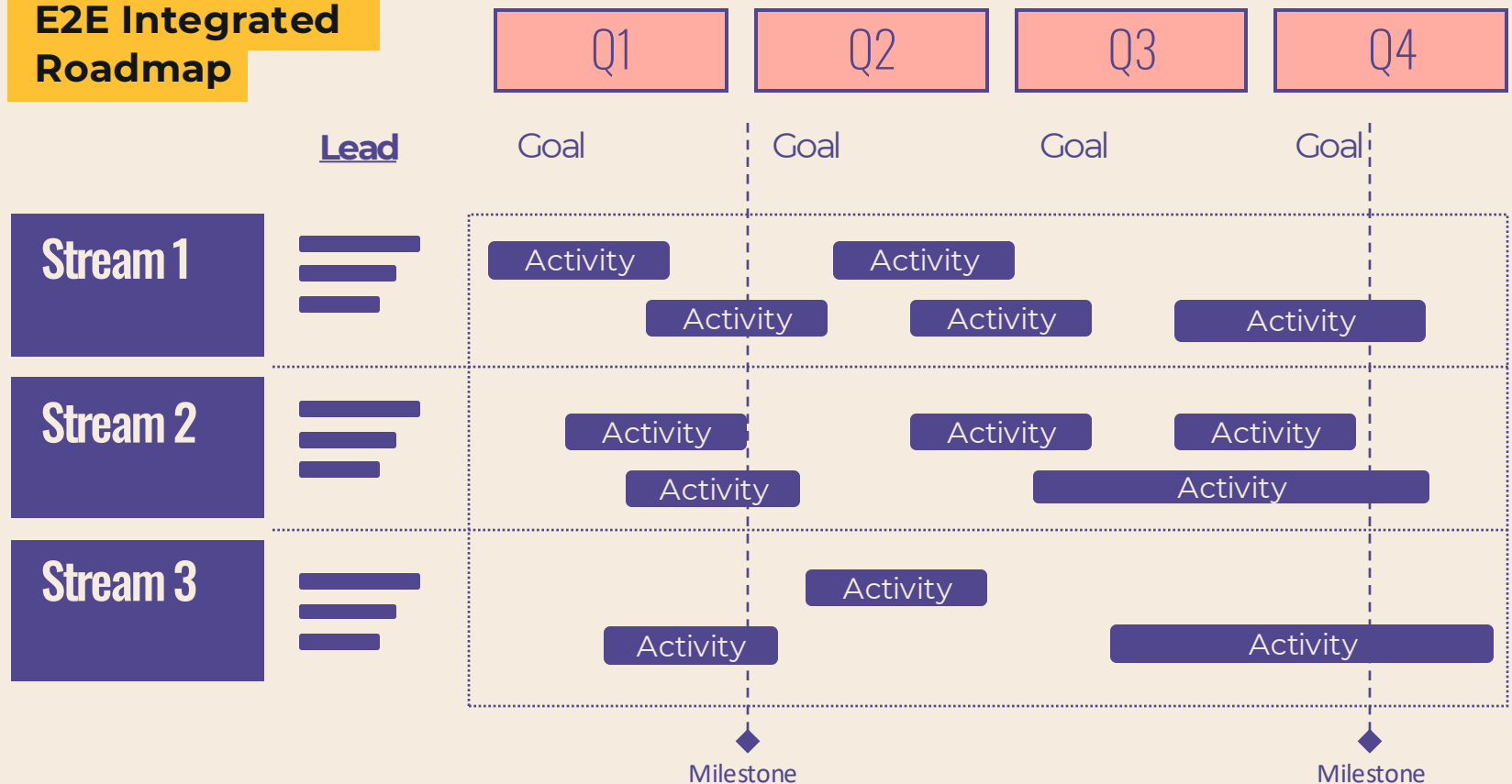
Execution Plan

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>

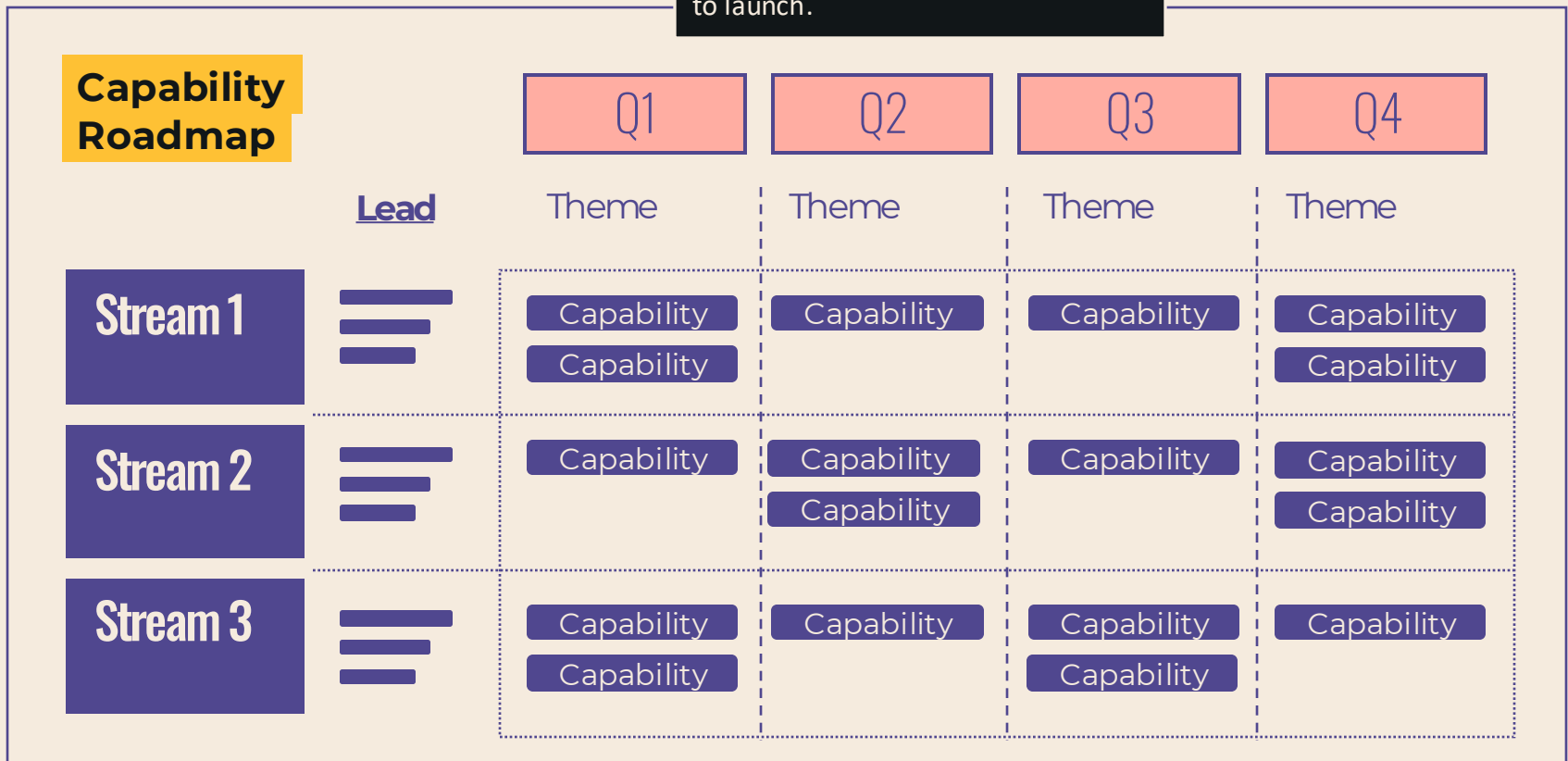
Capability Drop

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!