

24 Essential Frameworks for Making Creative and Marketing Decisions

A comprehensive guide to mental models for innovation, decision-making, team management, creative problem solving, and strategic client thinking.

All you do, every day, is make decisions. At work, you might decide to spend time on problem A instead of problem B. You might decide to use this product strategy over that product strategy. You might decide to place pixels here, not there.

But how do you make those decisions? Yes, you use intuition. Yes, you use experience. But you can never be 100% certain of the outcome. The only thing you can be certain of is the quality of the process you use to make your decisions. And that is exactly what frameworks are for.

A framework is a mental model used to solve problems. It is a representation of a problem space, the relationship between the various parts in that space, and a person's perception of their actions and the consequences within that space. You can use frameworks to think more intelligently about any challenge or opportunity that lies before you, and ultimately make better choices.

This guide has been organized into four sections: managing yourself, managing teams, creative problem solving, and client thinking.

Section 1: Managing Yourself

1. First-Principles Thinking

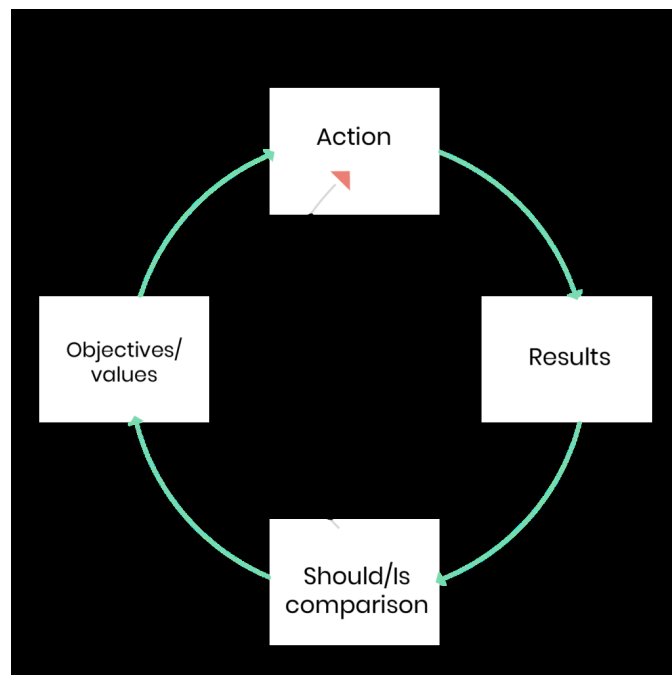
How to reason

When you reason via first principles, you break everything down to component parts and fundamental truths and then build back up again logically. This 'why, why, why' process is intended to get away from convention, or similarities to prior experiences. By starting with what is actually true instead of simply using intuition, you clear pathways for creativity and solution-finding.

2. Double-Loop Thinking

How to learn from experience

Coined by business theorist Chris Argyris, double-loop thinking is the process of modifying your goals or decision-making rules based on the results of experience. The first time we make a decision or attempt a task, we are engaged in single-loop thinking. If we then question our assumptions, biases, mental models, or approach, we're using double-loop thinking. The latter allows you to update your priors and learn more rapidly.



3. Constructive vs. Destructive Thinking

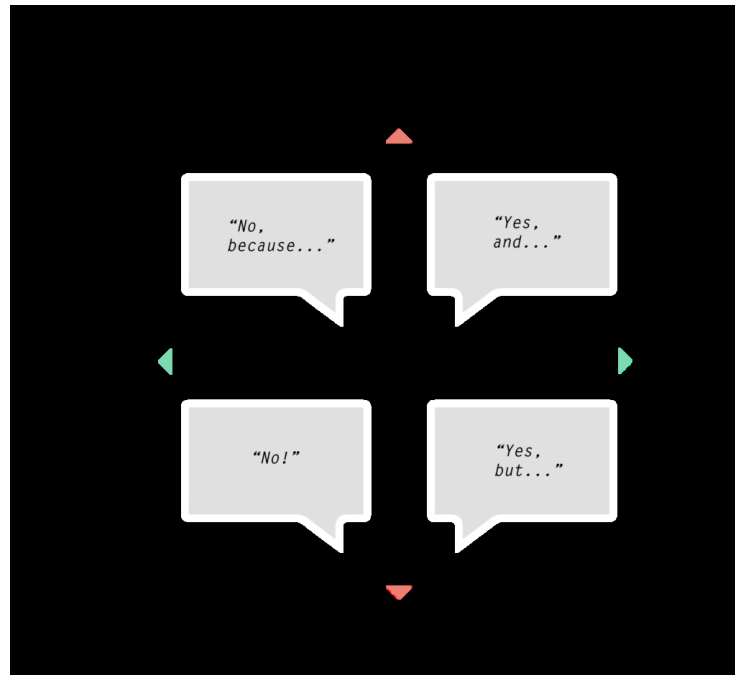
How to collaborate positively

When it comes to conversations about ideas, there are at least four types of actors:

- The fault-finder: 'The idea is good, but ...'

- The dictator: 'No.'
- The schoolteacher: 'No, the idea isn't good because ...'
- The improv thinker: 'Yes, and we could also ...'

By reflecting on our own conversational tendencies, we can reveal pathways to better idea generation. With the 'Yes, and ...' technique, which sits in the sweet spot of the matrix, you accept a participant's statement and then expand on that line of thinking with your own insights.



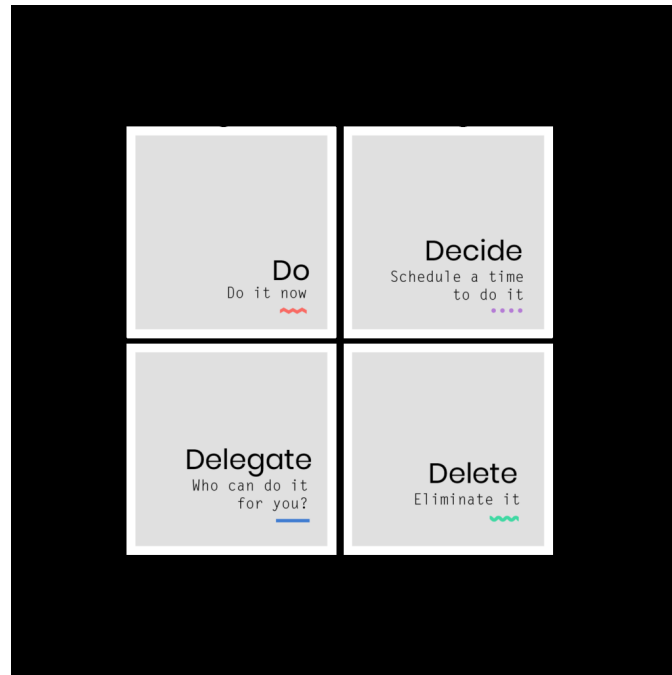
4. Eisenhower Matrix

How to prioritize decisions

The Eisenhower Matrix stems from a quote attributed to President Dwight D. Eisenhower: 'I have two kinds of problems, the urgent and the important. The urgent are not important, and the important are never urgent.' The resulting tool helps you categorize decisions and thereby make decisions more quickly. It has four categories:

- Important, but not urgent: Decide when to do it.
- Urgent and important: Do it now.
- Urgent but not important: Delegate it.
- Not important and not urgent: Delete it.

When a new request lands in your inbox, or when you're deciding what new project to tackle, take a moment to prioritize it using these categories.



5. Feedback Analysis

How to understand compliments and criticism

Receiving feedback is one of the toughest challenges we face. It's easy to be hurt by criticism and false compliments. It's also easy to misinterpret feedback and adjust your actions in the wrong direction. The Feedback Analysis matrix helps you to sort what you heard into categories so that you can best understand the purpose of the feedback and form an appropriate plan of action.

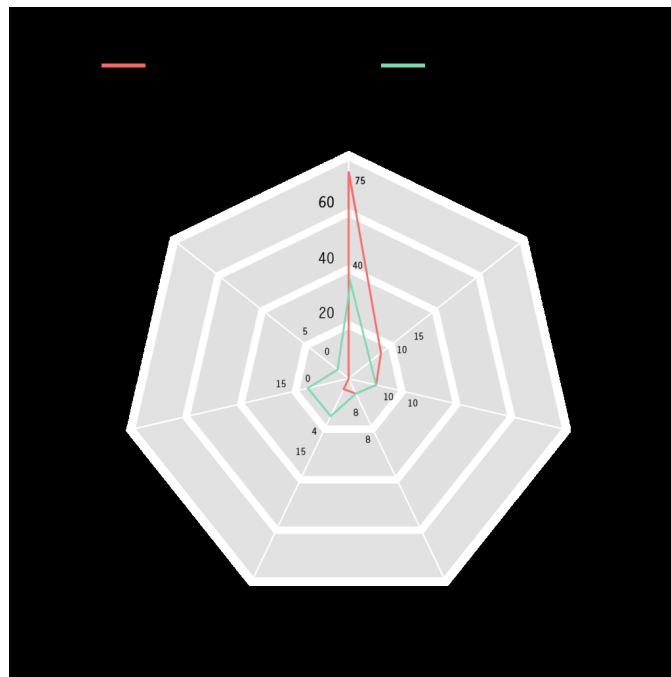


6. Life Balance Wheel

How to assess your level of fulfillment

The Life Balance Wheel helps you assess your priorities and your level of satisfaction with your work and life. This allows you to focus your time on what really matters.

To get started, draw six to eight axes (e.g., Professional, Social, Spiritual, Financial, Creative, Relationship). Now draw concentric circles to define a five-point self-report scale with the outermost being the highest. Mark where you sit on the scale on each axis, and connect the dots. A shape will emerge. Does your life look balanced? Use the same chart over time to understand what's working and what's not, and assess your life pattern.



7. Sturgeon's Law

How to keep pushing

Theodore Sturgeon is regarded as one of the godfathers of contemporary science fiction. In defense of his genre as art, he formulated Sturgeon's revelation, later Sturgeon's Law: '90% of everything is crud.'

Thus, if 90% of everything is crud, you can boil all this down to a simple guiding principle: Make a lot; the vast majority doesn't matter, some will.

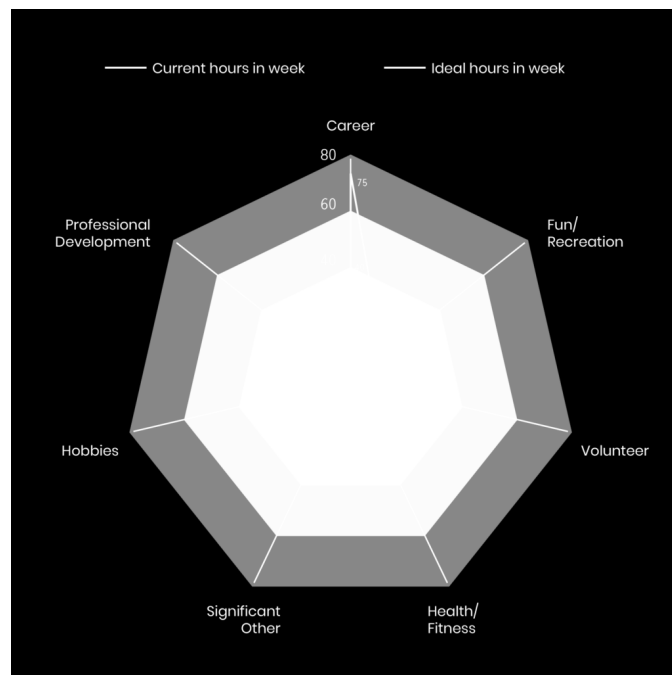
Section 2: Managing Teams

8. Blake-Mouton Managerial Grid

How to understand leaders

Created in 1964 by Robert Blake and Jane Mouton and inspired by Douglas McGregor's Theory Y, this grid ranks leaders along two axes: Concern for People and Concern for Production.

The ideal state, according to Blake-Mouton, is the 'team model': high concern for people combined with an emphasis on teamwork and commitment. Ask yourself: Where does my style fit on this grid?



9. The Team Model

How to gauge team strengths

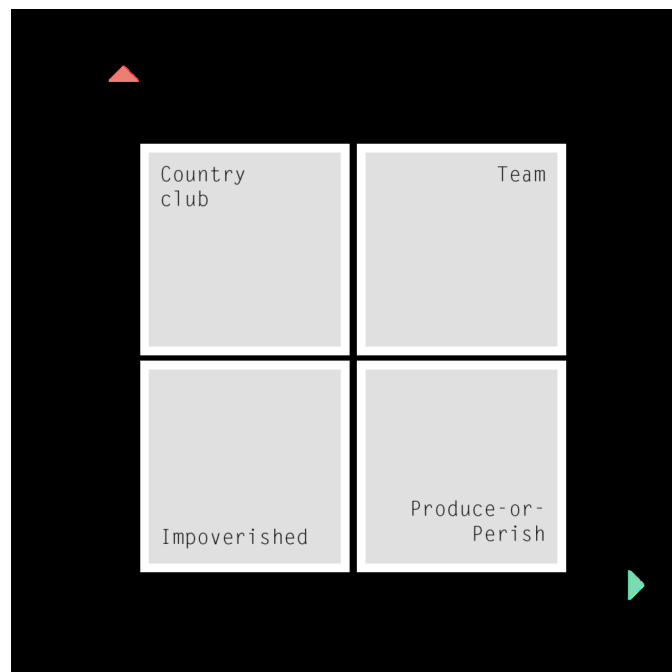
As explained in the excellent Decision Book by Mikael Krogerus and Roman Tschäppeler, the Team Model helps a leader to rank and visualize the skills of individual team members, thereby creating a model of how the team might perform. The model can help predict when a team might run into challenges, and who among the team is best equipped to lead certain tasks. Five key variables to consider: strategic, creative, collaborative, organized, and client-minded.



10. Situational Leadership

How to manage in context

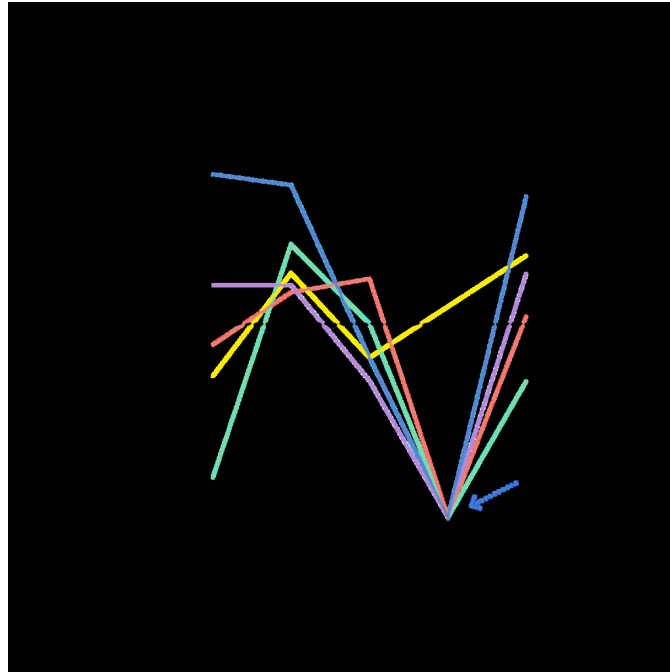
Created by Paul Hersey and Ken Blanchard in 1969, the Situational Leadership Model argues that there is no single 'best' style of leadership. Instead, leadership is task-relevant and adaptable to the ability and willingness of the individual or group being led. In each phase, the managerial action is dependent on the employee traits and context of the work.



11. Radical Candor Matrix

How to give feedback

'Radical candor' has been a buzz phrase in tech circles for many years. The model advocates for both 'caring personally' and 'challenging directly,' the idea being that the best feedback includes both qualities. By suggesting both empathy and clarity, radical candor helps you to avoid the common traps of being positive for fear of criticizing (ruinous empathy) and being negative for lack of care (obnoxious aggression).

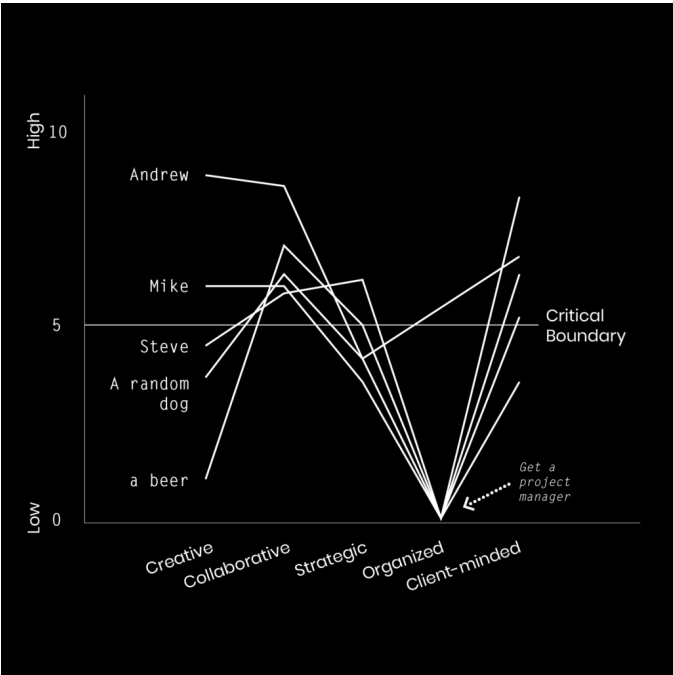


12. Johari Window

How to visualize uncertainty

Devised in 1955 by American psychologists Joseph Luft and Harry Ingham — Johari is a portmanteau of their first names — the Johari Window is traditionally intended to help people understand their relationship to themselves and to others. Everybody thinks they understand what they're doing. But in reality, there's usually a schooner full of blind spots.

By asking the client about their business and challenges, we reduce our ignorance of the situation. By telling the client about our knowledge, we reduce their façade. And by sharing our research and insights with the client, we reduce the 'unknown unknowns,' or potential risks associated with the project.

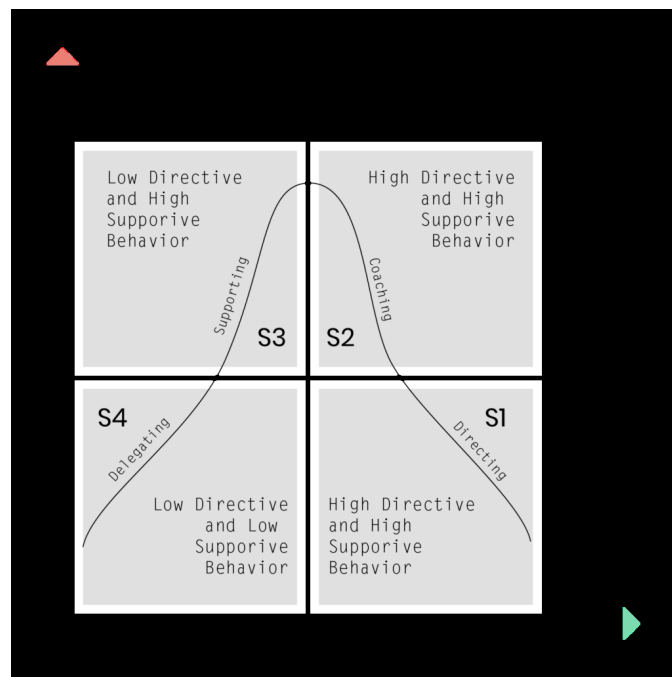


Section 3: Creative Problem Solving

13. The Five Whys

How to get to the root cause

Originally developed by Sakichi Toyoda and later included in the Toyota Production System, the Five Whys also happens to be the framework most commonly used by inquisitive children ('Why? But why?'). The goal of the technique is to determine the root cause of a problem by repeating the question. Each answer forms the basis of the next question. The key is to avoid cognitive bias and instead trace chains of causality.

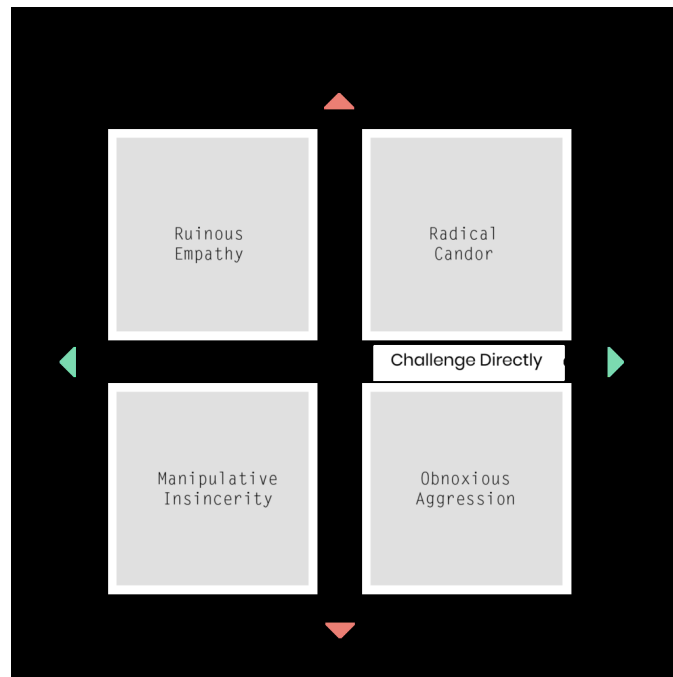


14. Affinity Diagrams

How to organize ideas

An affinity diagram is a simple but powerful tool to help you organize a large number of ideas into their natural relationships. After generating ideas, group the ideas according to their affinity, or similarity. This allows you the freedom to think divergently before organizing convergently.

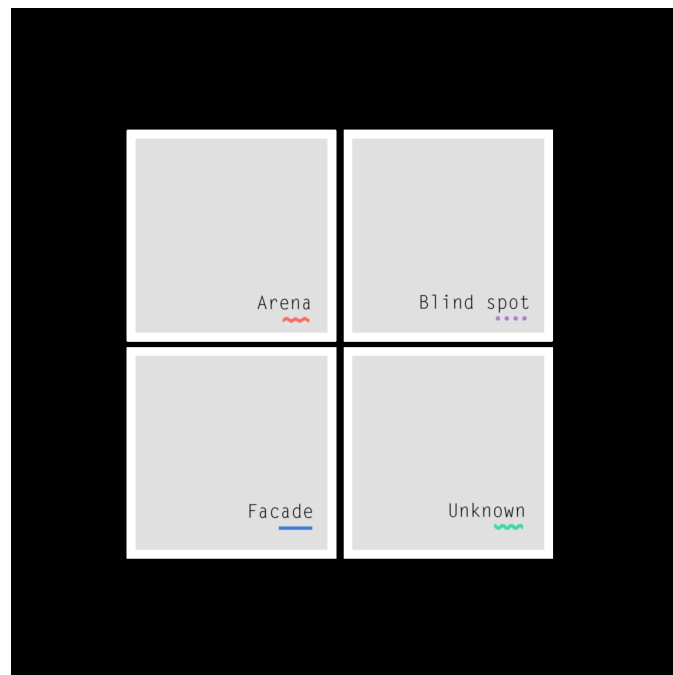
Affinity diagramming was created in the 1960s by Jiro Kawakita, and is considered a foundational concept of the seven management and planning tools developed by the Union of Japanese Scientists and Engineers in 1976.



15. Hurson's Productive Thinking Model

How to be consistently creative

Use Hurson's when you're first beginning to tackle a problem. It will help you develop a better understanding of the problem, and, consequently, develop better solutions.

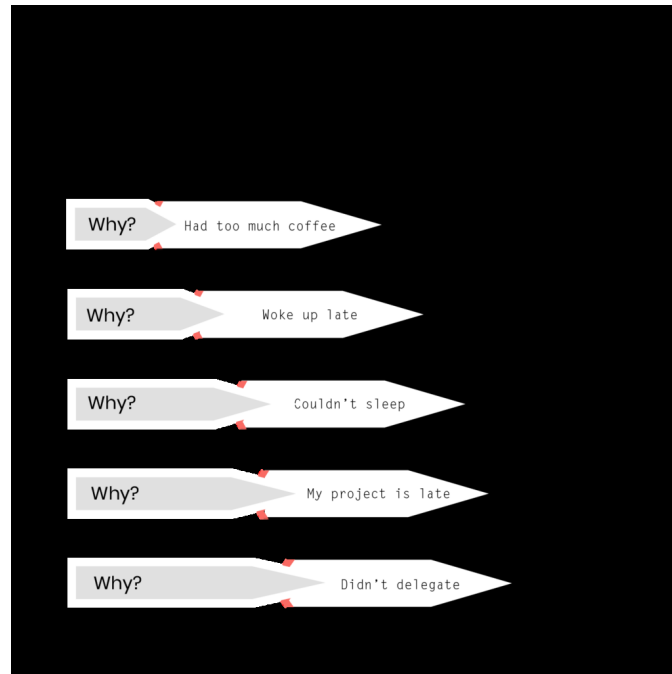


16. Six Thinking Hats

How to use multiple points of view

Project teams benefit from diverse viewpoints that challenge assumptions. One way to ensure that happens is to use the Six Thinking Hats.

The hats allow your team to separate thinking into six clear functions and roles, symbolized by a 'thinking hat.' By mentally wearing and switching 'hats,' you can focus or redirect thoughts, the conversation, or the meeting.



17. CATWOE

How to solve complicated problems

There are at least two types of problems in the world: tame problems and wicked problems. Tame problems have known boundaries and determinate scope. They have a set solution. Wicked problems are indeterminate and unique. They're 'stop global warming' and 'revitalize Detroit.' They have unknown boundaries and unclear cause and effect. They don't have a right or wrong answer, only solutions that are better or worse.

And that's what CATWOE is for: solving wicked problems by identifying problem areas, looking at what a company wants to achieve, and which solutions can influence the stakeholders.

% purity

% trace metals

Color

Viscosity

ppm water

Cp_k values

Customer complaints

% rework or reject

of customer returns

Overtime costs

$\frac{\text{Overtime}}{\text{Total hours}}$

Raw material utilization

Maintenance costs

Material costs

Yield

Utility costs

\$ per lb. produced

$\frac{\text{Hrs. worked}}{\text{Employee}}$

Maintenance costs

of emergency jobs

of pump seal failures

Hours downtime

% uptime

Service factor

Time between turnarounds

of OSHA recordables

Days since last lost-time

Lbs. waste

Environmental accidents

Housekeeping score

Lbs. produced

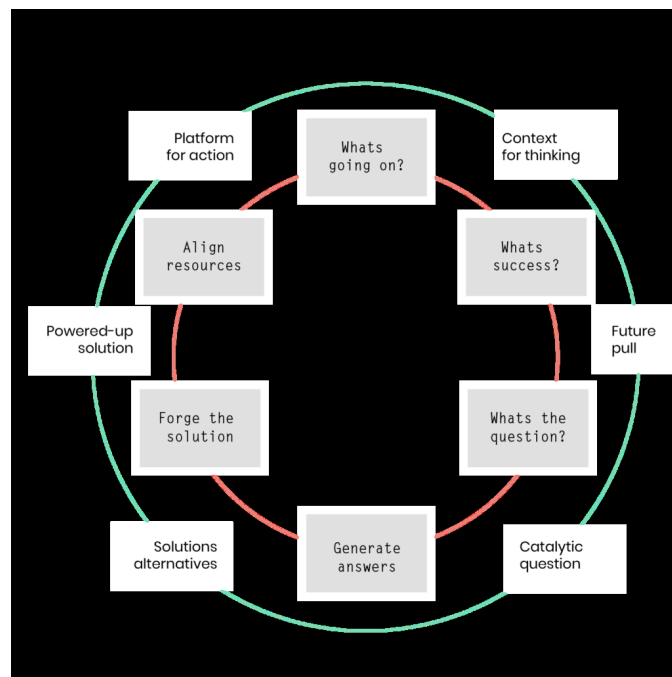
% capacity filled

Section 4: Client Thinking

18. Pace Layers

How to understand the pace of change

Developed by Stewart Brand in connection with the Clock of the Long Now project, Pace Layers visualizes the different speeds at which various layers of society moves. A notable version of Pace Layers is Gartner's three-layer enterprise IT strategy, which breaks software down into systems of innovation, differentiation, and record — each with their own pace, planning, and governance. You can apply this framework to understand your client's business and your own.



19. Purchase Funnel

How to understand the path of acquisition

The purchase funnel is a marketing model that illustrates the theoretical customer journey toward the purchase of a good or service.

The operative word here is 'theoretical.' In recent years, brands have begun to update the funnel with a more user-centric model: the customer journey map. A journey map illustrates each step of a customer's interaction with a brand. These maps help clients see gaps in current customer experience and come to an agreement on what tactics to invest in.

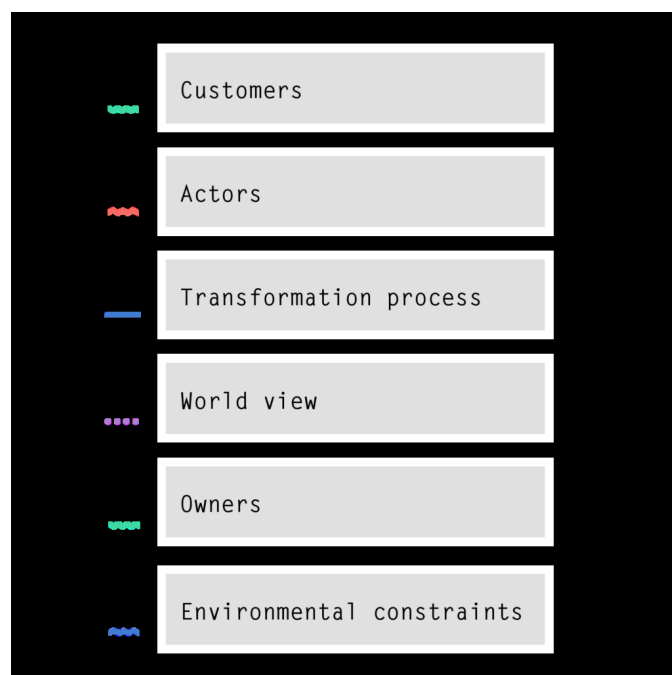
Note: One client's customer journey map will look different from the other; there is no 'right' version. However, any truly useful map will include a customer-centric view of the experience, marketing goals, messaging opportunities, and suggested touchpoints and tactics for each step.



20. Porter's Five Forces

How to understand an industry landscape

First articulated in 1979, Porter's Five Forces is designed for a business landscape that predates the era of digital disruption — but the act (and art) of examining fundamentals of competition is a worthy exercise that your client's corporate strategists still conduct to this day.



21. Ansoff's Matrix

How to plan for future growth

Also called the Product-Market matrix, this 2x2 gem tees up four growth strategies with varying levels of risk. You can try to sell more things to the same people (safest), sell something new to the same people, sell the same thing to new people, or sell something new to new people (riskiest). After choosing a growth strategy, marketing and product leaders (and you, the creative thinker who supports them) should tailor tactics accordingly.

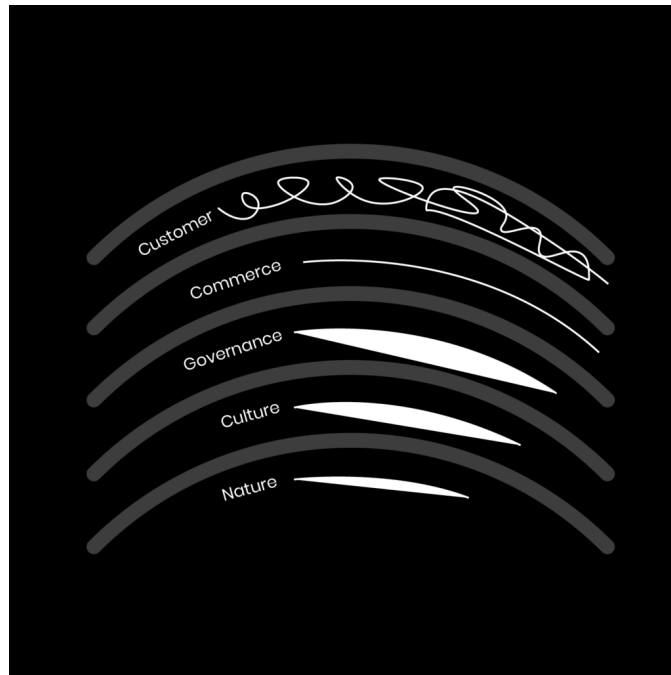


22. The 3C Model

How to understand factors for brand success

Developed by organizational theorist Kenichi Ohmae, the 3Cs help clients think through fundamental factors for success and how to optimally integrate them for sustained competitive advantage. Earn points with your client by understanding their world along these categories. Better yet, also bring in a razor-sharp point of view on a fourth 'C' worthy of consideration: culture.

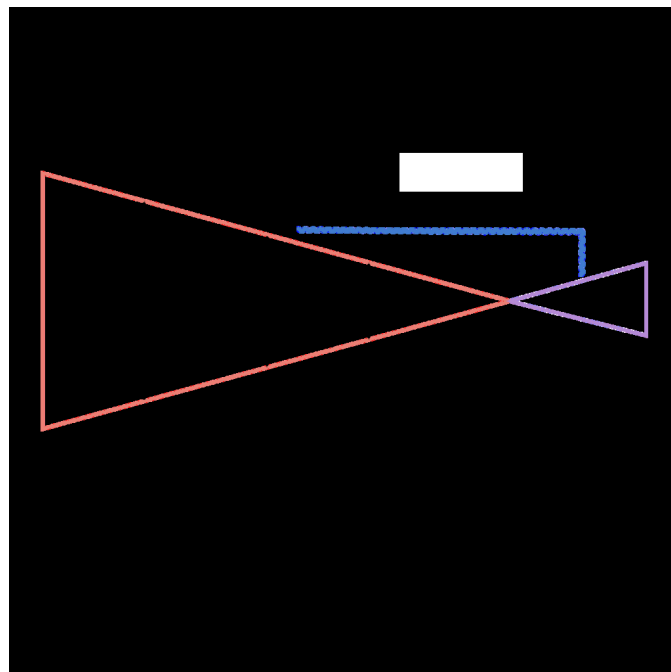
For another tool to understand clients' factors for success, see the ubiquitous SWOT analysis or the lesser-known and much more complicated Wardley Maps.



23. Business Model Canvas

How to understand a business model

The Business Model Canvas outlines nine elements of a business. This provides a high-level snapshot of the company itself and the underlying dynamics that keep it competitive, for any industry and at any growth stage. It's a tool that clients use to design and evaluate business models, and which you can use to map a client's business and ask better questions.



24. The S/PUD Brand Prototyping Model

How to Create and Understand a Brand's Strategy

The S/PUD Model eschews the development of 'brand essence' by committee in favor of thinking about these four things:

1. Why you exist (the story you tell to employees and potential hires).
2. How you're useful (the functional good you do in the world).
3. How you're distinctive (how you'll stand apart from competitors and context).
4. Your brand strategy (the brand you'll build, and how you'll build it).

