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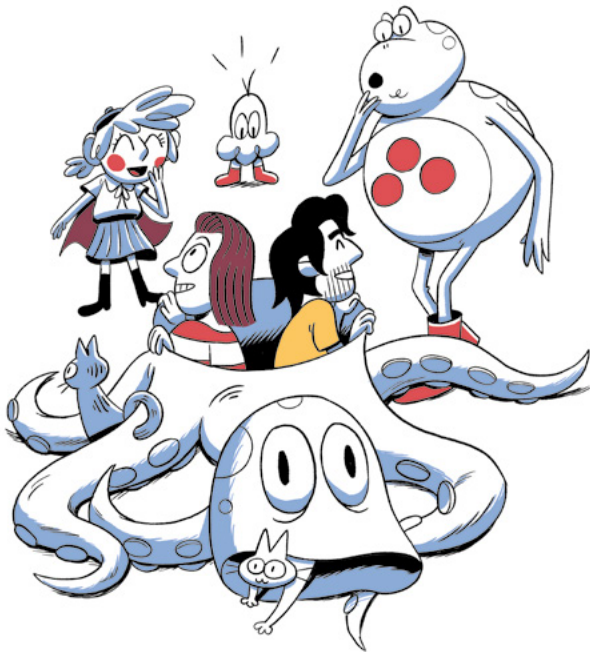
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Strategy Tactics

Volume I

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There's no one right way to start

Sometimes you have to make decisions when there's no one right way. This is one of those times! Fortunately, we've got a few low-stakes ways to help you get started:

Follow our process

1. Find the *Strategy System* card.
2. Answer the questions until a category is recommended.
3. Use any tactic from that category.

Try our favorite recipes

1. Find the cards in the  *Recipe* category.
2. Choose one that matches your goals.
3. Use the tactics recommended in the recipe.

Follow your heart

1. Spread the deck out on the table in front of you.
2. Skim through the titles and concepts until you find one that speaks to your current challenges.
3. Use that tactic and explore the related tactics recommended at the bottom of the card.

A few quick tips

- It's great to do these tactics on your own. It's even better to try them together with advisors, teams, or peers!
- Use these tactics to take small, bold steps every day instead of changing everything all at once.
- Mistakes are important. They're how you learn! So don't try to be perfect, but do pay careful attention to failure.

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Strategy System

Do you have a clear idea of what you should be working on, and why?

No →



Purpose

Yes



Are you aware of all the moving parts of what you're working on?

No →



Identify

Yes



Do you know exactly how the parts combine to create value?

No →



Connect

Yes



Do you know where things are headed by default?

No →



Evolve

Yes



Do you know how to adapt and thrive??

No →



Adapt

Yes



Do you know how to win?

No →



Plays

Yes



Does everyone know what to do?

No →



Lead

Yes



Take action, learn from what happens and go again!



Purpose

Find out why you should even bother, then decide what you want to accomplish.



Identify

Make any situation discussable by breaking it down into clear whos and whats.



Connect

Find out how all the pieces fit together to learn how the whole thing works.



Evolve

Embrace market movement, so you can go with the flow – instead of crashing into it.



Adapt

Change your behavior so you can thrive within a challenging, competitive environment.



Plays

Change the environment itself until it meets your needs.



Lead

Be clear, do the right thing and help others contribute their best.



Recipe


Good strategy is a game changer. Discover new possibilities by combining different tactics.



Small-Batch Strategy

Forget annual planning! Run this lightweight process as often as you need to keep up with the true pace of change.

This tactic offers a smaller, faster planning process that delivers better outcomes in less time. After all, change is always happening. What good is it if we can only respond once a year?

Make a  **Wardley Map** first to describe your situation and help set the stage for these strategy conversations.

Small-Batch Strategy

1. 🚧 Complaint Department

Find out what you don't like about today, and then decide which problems to address first.



2. 🚧 Default Disaster

Give yourself a clear reason to change by imagining what will happen if those problems remain unaddressed.



3. 🚧 Tripwires

Set up an early warning system for potential disasters, so you don't have to worry about them (at least until you need to).



4. 🚧 Feasible Futures

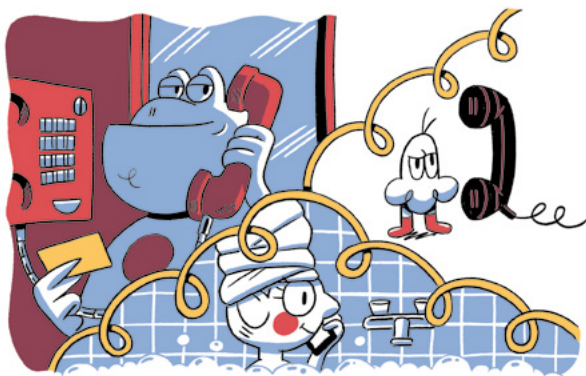
Unleash your imagination and decide what you want for the future, without being limited by what you have today.



5. 🚧 Better Now

Instead of working towards a far-off future, create a version of now that makes many good futures possible!





Call & Response

Help people understand the strategy by getting them involved in its creation.

Strategies need to make sense to the people actually doing the work to carry them out. You don't need perfect agreement, but everyone involved does need to know how the decisions were made. You'll never be brilliant enough to 'deploy' a strategy into people's heads without their input anyway, so let's just skip ahead to the part where they get to have a say.

Consider running  **Complaint Department** as a warmup for this tactic. Follow this up with  **Better Now** to make a plan.

Call & Response

1. 🌸 Give Me A Reason

Why does any of this matter?
Paint a compelling picture of
the future we're fighting for.



2. 🌸 Measure Twice

Get better outcomes by
subjecting your assumptions
and beliefs to a trial-by-fire of
human scrutiny.



3. 🌸 Challenge Statement

Create and deliver a clear
articulation of the next
challenge to overcome.



4. 🌸 Backbrief

Rehearse the action to come,
uncovering obstacles and
misunderstandings early.



5. 🌸 Decision Diary

Improve your decision-making
by predicting what will happen
and then reflecting on whether
you were right.





The Basics

Gather the essential information about how your business works, so that you have a solid foundation for a great strategy.

Every effort, no matter how big or small, should have the basics defined, such as who the work serves, what needs it meets, and how we expect to make it all happen. While you may be tempted to say “We already know all that”, do yourself a favor and show your work! Chances are, you’ll find something that saves you countless hours of pain and misery.

This toolkit helps you gather everything you need in order to build a

 *Wardley Map.*

The Basics

1. 👁️ Human Network

Who is all this work for? Find out who is counting on you, and make sure no one gets missed!



2. 👁️ Promise Proposal

What do they get? What promises have we made? And how good or bad are we at meeting them?



3. 👁️ Seeking Specifics

What are the moving parts that make those promises happen? And are they in good or bad shape?



4. 🗑️ Value Chain

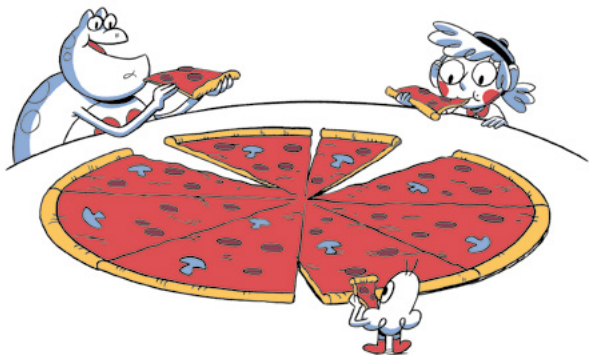
How does all the above fit together? Visualize and share the theory of how work gets done and what it accomplishes.



5. 🌐 Market Evolution

What does the market have to say? Enrich your inside view with a dose of outside perspective.





Eat An Elephant

Get acquainted with an overwhelming new situation, one bite at a time.

In messy situations with lots of moving parts, starting from zero can be really discouraging. Instead of aiming to understand the whole thing all at once, this tactic helps you get a small piece of the puzzle figured out and then expand outward from there.

Eat An Elephant

1. 🏰 Name Your Game

What's your motivation? Decide why you want to figure it all out, so you can stay focused as the mess ebbs and flows.



2. 🦋 Open-Source Intelligence

When in doubt, find stuff to read! Old reports, chat logs, tickets, etc. are gold mines for crucial, oft-forgotten context.



3. 🕵️ Mystery Machine

Find a foothold in the mess. Pick one important part and study it to discover what it does.



4. 🌫️ Fog Of Work

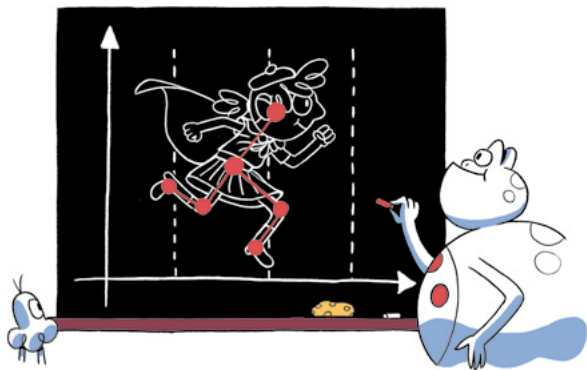
Use your foothold to find new, nearby parts to study.



5. 🏗️ Five Whats

Dig deep into the foundations. What is down there propping everything up?








Wardley Map

Create a map of any situation so you can figure out what's going on and plot your next move.

A Wardley Map is a sketch that models all the situation's moving parts (users, needs and capabilities) and how they fit together in the context of a global market. With a map in hand, you can finally see everything that needs your attention (and intention) as you create a strategic design.

For strategy conversation starters, try pairing an *Evolve* , *Adapt*  or *Plays*  tactic with a *Wardley Map*! Repeat this recipe to improve your map or make new maps as you find gaps in what you know.

Wardley Map

1. Gather together around your workspace and make a list of 📁 **The Basics**. Be sure to include:

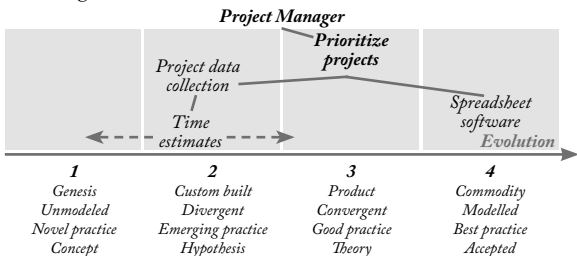
- Users: who benefits from the situation?
- Need: what do they get?
- Capabilities: what makes it happen?

2. Turn the list into a 🗑️ **Value Chain** by adding 'depends-on' connections.

- a. Users at the top depend on Needs.
- b. Needs depend on Capabilities.
- c. Capabilities depend on Capabilities (as needed, all the way down).

3. Add 🌐 **Market Evolution**.

- a. Divide the space below the Users into four stages.
- b. Work together to shift the Needs and Capabilities left or right into the stage that fits best.



4. Use your Wardley Map to prompt the development of new strategies, starting with these key conversations:

- Find the source of your pain, with 🔍 **Seeking Specifics**
- Decide which parts to build or buy, with 🛠️ **Why DIY?**
- Explore new ways to compete, with 🌸 **Compete Different**



Ready For Trouble

Escape the clutches of these five malicious market monsters, so you can live to fight another day.

Disaster can sneak up on you, and it's easy to miss the warning signs when you're busy getting things done. This recipe helps you spot five common sources of danger in the market: Lack of Purpose, Complacency, Big-Bang Change, Unconscious Growth and Disruption. Learn to recognize each one so you know exactly what to do should you encounter them on your journey.

Ready For Trouble

Monster 1: Lack of Purpose

🦋 *Close Up Shop* to evade the whirlpools of work that harm the world or don't even matter.

C'mon, do things that matter!



Monster 2: Complacency

Snap out of cozy ignorance! Disarm your resistance to new things; 🦋 *Embrace The Change* that's already here!



Monster 3: Big-Bang Change

Escape the 🦋 *Legacy Trap*, and silence the siren song of silver bullet solutions! It's time to do what must be done, bit by bit.



Monster 4: Unconscious Growth

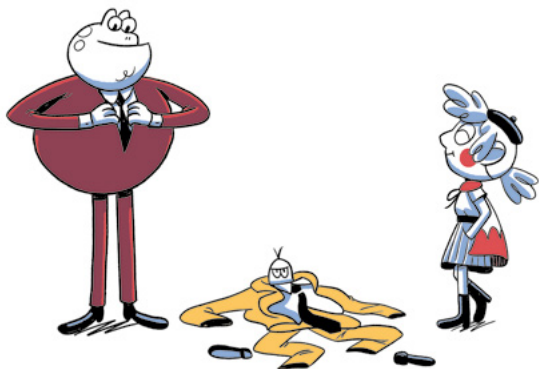
Use 🦋 *Big Frog, Little Pond* to stay grounded in the smallest viable way that meets your needs.



Monster 5: Disruption

It strikes with both head and tail; one we can predict, the other we cannot. Do your best with 🦋 *Disruption Readiness*.





Just Right

Pick the right tool for the job so you can spare yourself the pain of one-size-fits-none solutions.

Your favorite tools are useful in some contexts, but useless in others. For nails, try hammering. For screws... try something else! The painful truth is: there's no single 'best' way. Pick the right tool for the job, every time.

"Life is pain, Highness. Anyone who says differently is selling something." – Dread Pirate Roberts, *The Princess Bride*.

Check out  **Market Evolution**. It's the secret ingredient that makes each tactic in this recipe sing!

Just Right

1. 🦄 Why DIY?

Decide whether to build, buy or outsource something based on the market, not your gut.



2. 🦄 Shift Gears

Agile, Lean and Six Sigma offer different gears for different kinds of driving. Find the right match for the road ahead!



3. 🦄 Buyer's Remorse

Bad contracts ruin good relationships. Are you setting the right terms and expectations for the work?



4. 🦄 Adjustable Attitudes

Would they rather make big discoveries or small adjustments? Match people to the way they work best!



5. 🦄 Experiment Methods

Are you discovering something new? Improving what you've got? Or optimizing all the way? Choose experiments wisely!





Close Up Shop

Confront the hard truth about your impact on the world, so you can discover a compelling reason to keep going.

Shake things up instead of creating another mind-numbing vision/mission/values statement. This tactic ponders “Why shouldn’t we just shut it all down?” to help you home in on your deeper purpose.

Close Up Shop


1. Add two sets of the following headings and prompts to your workspace.

Cons:

- What's the bad news?
- What bad things will happen now?
- How will the world become worse?

Pros:

- What's the good news?
- What amazing things can happen now?
- How will the world become better?

2. Ask the group to spend one minute imagining what would happen if you shut the whole organisation down forever.
3. As a group, respond to the prompts for *Cons*. Write down the answers that come up (one per sticky note) and add them to the workspace as you go. Repeat for *Pros*.
4. Repeat the whole process, but this time imagine that the organisation stays open and follows its current path, using the second set of *Pros/Cons* headings.
5. Give everyone three votes to allocate however they like in response to the prompt: "Of the second set of stickies, which are the most compelling reasons to keep going as an organization?".
6. Once you've agreed on a renewed sense of purpose, set it in action with  **Better Now**.



Default Disaster

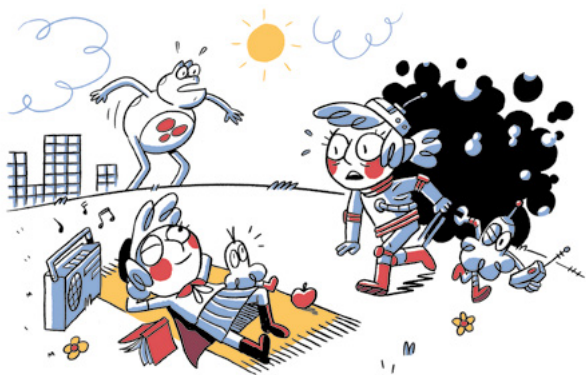
Imagine the catastrophe that will happen if nothing changes, and then make a plan to avoid it.

Sometimes it's hard to choose which problem to work on. This tactic brings the clarity that only an 'oh fudge' moment can bring! Identify what kind of horrible futures are already on their way to help you escape your indecision and find the courage to take action, right now.

Consider running  **Complaint Department** as a warm-up for this tactic. Follow this up with  **Better Now** to make a plan.

Default Disaster

1. Gather your team around the workspace. Divide it into three sections: *Now*, *Next*, and *Eventually*.
2. Invite the group to complain: “What are all the problems we’re experiencing right now?”. Capture the problems, one per sticky note, and add them to the *Now* section.
3. Pick one problem, then ask everyone to imagine the immediate consequences if it remains unaddressed. Capture these in the *Next* section.
4. For the same problem, invite everyone to play the consequences out even further. What disaster will happen eventually if it remains unaddressed? Capture each potential catastrophe and add it to the *Eventually* section.
5. Repeat steps 3 and 4 for each remaining *Now* problem.
6. Ask the group: “Given what happens Next and Eventually, which Now problems will we regret ignoring the most?” Give everyone three votes to allocate however they like within the *Now* section.
7. Make a plan to address the most regret-inducing problems. A 🚒 **Better Now** exercise may help.



Better Now

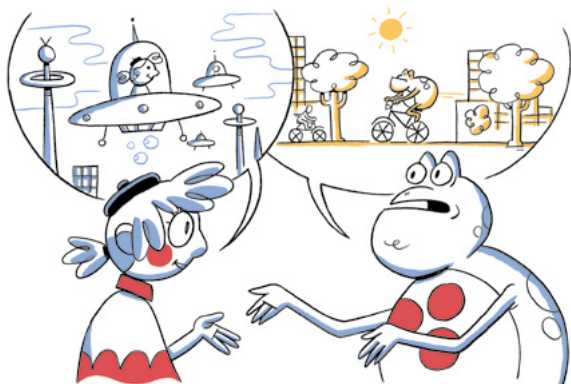
Aim for the best possible version of today to unlock the many amazing possibilities of tomorrow.

The gold standard of strategic planning is to “imagine the future, then make a plan to get there”. But things don’t always go according to plan! The future we get is always different than the one we imagined. Make peace with these truths and try something new: instead of planning out the future, aim for a better now (that makes better futures guaranteed)!

Better Now

1. Invite your team to write down their answers to the following questions, one per sticky note, and place them on the right-hand side of your workspace.
 - a. “What would a good future look like for us?”
 - b. “How would it be different than what we have now?”
 - c. “Imagine the default future that lies ahead of us now. How would a good future be different from that?”
2. Ask the group to imagine a ‘better now’ – a parallel universe where you already have everything you need to reach the good futures they identified. Invite them to write down their answers to the following, one per sticky note, and place them in the center of the workspace:
 - “What would a ‘better now’ look like for us?”
 - “How would it be different than the ‘now’ we already have?”
 - Finish the phrase, “In a ‘better now,’ we would already _____.”
3. Invite the group to make a plan to get to the ‘better now.’ Have them answer the following, one per sticky note, and place each answer on the left-hand side of the workspace:
 - “What can we do right now to get to the ‘better now?’”
 - “What can we do to build the capabilities we need to get to the ‘better now?’”
 - “What signs would tell us we were getting closer?”
4. Start working towards the ‘better now’! Re-run this tactic when you see the signs identified above or if progress stalls.

Tip: try this tactic solo as a weekly planning process.



Feasible Futures

What would we build if we had a blank slate?

When planning for the future, it's easy to make the mistake of either aiming only for a slight improvement on what we have (too unimaginative) or betting everything on an unlikely utopia (too fantastical). This tactic balances imagination with reality by asking, "What would we build today if we had to start over from zero?"

Run  **Close Up Shop** before this tactic for maximum effect. Turn your discussion into a transition plan with  **Better Now**.

Feasible Futures

1. Gather your team and ask each person to make their own list of things they're currently working on — tasks, tickets, projects, products, services or anything else that takes up their time.
2. Read the following out loud: *"I'd like you to imagine that every single thing on your list has been destroyed, discontinued or defunded. Imagine that the rest of the world is fine, our organization is still here, but all our work is gone."*

Discuss:

- "What's the bad news?" (Why should we grieve?)
 - "What's the good news?" (Why should we celebrate?)
3. Ask: "Since all our work is gone, what else could replace it? What should we build today to make the most of this chance to start over?"

Ask each person to write down their ideas, one per sticky note. Give them plenty of time to think, but request they keep things feasible; no sci-fi or fantasy, please!

Post the sticky notes where everyone can see, and review them together. These ideas are our feasible futures!

4. Discuss as a group: "Back in the real world (where our work hasn't been destroyed), what must happen to give the greatest number of these feasible futures a fighting chance?"


Tip: do not actually destroy everything and start over.



Complaint Department

Turn individual complaints into shared challenges to make change possible.

It's time to air those grievances! What is it about the way things are that is frustrating, bad or just plain wrong? Get it all out on the table and sort through the heap until you find the right issue to work on next.

If you're in the middle of a mess where every second counts, consider starting with  **Take Responsibility** instead.

Complaint Department

1. Ask your team the following question: “What complaints do you have about our current situation?”. Invite everyone to write down their answers, one per sticky note, and place them on your workspace.

Important: ask that they phrase each complaint negatively, so that everyone can understand just how bad it is.

2. One by one, read each complaint to the group and invite a brief discussion: “Does everyone agree that this is bad? Why/why not?”. If there isn’t agreement, revise it together or set it aside. Any complaints that remain at the end are no longer complaints, but shared challenges!
3. Finally, draw the diagram shown below. As a group, decide where to place each challenge; then, take the appropriate action for each one.








Plainly Put

Settle the differences between your words and your actions to find a purpose you can live up to every single day.

“Practically, integrity means that you are trustworthy. Others can trust you to do what you said you would do. Perhaps even more importantly, integrity means that you can trust yourself to do what you say you will do – including living out your highest aspirations and visions for participating in and serving the world.” – Tasshin Fogleman

Not sure whether purpose is worth all this effort?  **Close Up Shop** might be the right place to start.

Plainly Put

1. As a group, find and share all the 'official' answers to the questions: "What is our purpose? Why do we exist?". List them under the title '*What we say*' on your shared workspace.
2. Make a new list '*What we do*' and ask everyone to add the categories of work they do – anything that takes significant time or effort. (Try  **Seeking Specifics** for inspiration.)
3. Time for a reality check! Work together to match each item in the *What we do* list to an item in the *What we say* list. Draw a line between connected items. Add missing items as you think of them, then circle any items in either list that don't have a match.
4. Now you can see how well what you say matches what you actually do. With this in mind, work together to rewrite your purpose in plain language that a child would understand.
It may help to practice first on a major brand you know. For example:
 - *Your local coffee shop: "We sell coffee and a spot to chat with friends!"*
 - *A healthcare video conferencing start-up: "We help people talk to a doctor when they're feeling sick!"*
 - *A software platform team at a large company: "We make it easy for other teams to build new things!"*
5. Test out your plainly put purpose with people outside your group to see if it makes sense (try  **Measure Twice** for this).
"What we do is pretty simple. We _____."
6. Share your purpose! Find ways to celebrate when people live up to it and encourage others to follow their example.



Name Your Game

Account for your everyday actions and goals, so you can build your capacity to take on bigger and better challenges.

When the here-and-now consumes everyone's attention, you can miss the opportunity to think about the big picture. Use this tactic to increase your planning horizon, so you can pursue important opportunities outside of the standard field of play.

Once you've found a new game to play, practice sharing it with

 **Give Me A Reason.**

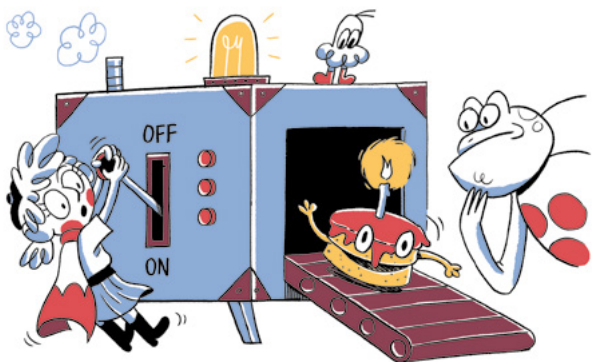
Name Your Game

- 1. On your own, on paper, use the questions below to complete the template:
 - a. Action: what are you working on right now?
 - b. Goal: what are you hoping to accomplish with that work?
 - c. Timescale: how long until you find out if you've succeeded?
"When I action, I'm playing a timescale game to goal."

Timescale reference

hours		days		weeks		quarters		years		decades	
<i>finish this</i>		<i>reduce</i>		<i>increase</i>		<i>increase</i>		<i>increase the</i>		<i>bring about</i>	
<i>support request</i>		<i>unfinished</i>		<i>customer</i>		<i>customer</i>		<i>market's</i>		<i>a generation</i>	
		<i>requests by 10%</i>		<i>happiness</i>		<i>capability and</i>		<i>appetite for</i>		<i>known for its</i>	
						<i>self-sufficiency</i>		<i>change</i>		<i>openness</i>	

- 2. Ask yourself: "What are my hopes, dreams, and responsibilities? Is the timescale I chose above big enough to hold them? How long-term should someone like me be thinking?" Take a moment to reflect on your answers.
- 3. Fill out the template again, with the following adjustments, to name your game:
 - a. Choose a Timescale that is slightly (but meaningfully) longer than your current game. For example, from 5 days to 2 weeks.
 - b. Update your Goal so it's big enough to match the Timescale.
 - c. Revise your Action to describe the same work you're already doing in a way that is big enough for the new Timescale.
- 4. Keep the new game you've written nearby as a reminder, and follow these tips to start playing:
 - a. Stop describing what you do in terms of the old game language. Start using the language of the new game!
 - b. Evaluate your own success or failure in terms of the new game, even if others try to impose shorter games.
 - c. Feedback is slower in longer games. Sometimes it never arrives! Try 📦 **Small-Batch Strategy** to stay oriented as you play your new game.



Mystery Machine

Make a model of a confusing or broken system to figure out how it works, identify what's wrong, and fix it!

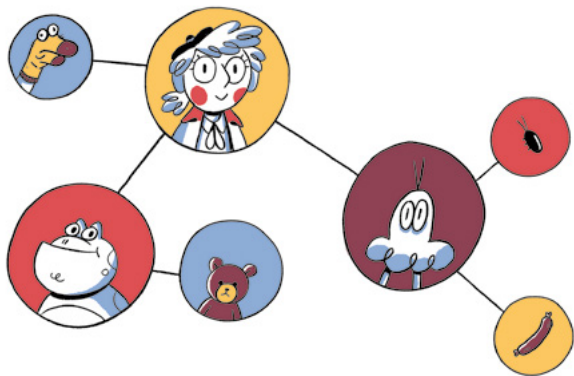
Build a small-scale model of how you think things work to help with your troubleshooting when things go wrong. The model doesn't need to be perfect, or even true – you can build it without knowing how everything works!

Mystery Machine

Tip: you won't go into this process knowing the answers, so expect to make educated guesses!

1. Working together, pick a current pain point that's hard to understand and troubleshoot: a messy step in a process, or even a whole department you don't know much about yet.
2. Imagine that this pain point is a 'mystery machine' – a big, metal box on a factory floor. One conveyer belt brings it inputs, and another shuttles away outputs.
 - a. Make a list of its inputs. What do you see going in?
 - b. Make a list of its outputs. What do you see coming out?
 - c. State the machine's purpose out loud: "This machine turns [inputs] into [outputs]."
3. Imagine an engineer comes along and opens the machine with a special key, making its moving parts visible to you. Make a list of all the parts you see:
 - a. What work activities are going on within?
 - b. What technologies do you see in use?
 - c. What skills, knowledge or data play a part in making it work?
4. Save your newly created model for future reference, and keep it nearby to guide conversations about the pain point.



"Models are idealized in the sense that they are less complicated than reality and hence easier to use for research purposes. These models are easier to manipulate and 'carry' than the real thing. The simplicity of models, compared with reality, lies in the fact that only the relevant properties of reality are represented." – Russ Ackoff



Human Network

Uncover your extended network of stakeholders, so their needs never catch you off guard.

Use this tactic to find and account for any secret stakeholders with the power to make your project crash and burn unexpectedly. There are always more stakeholders than you think – but who could they be?!

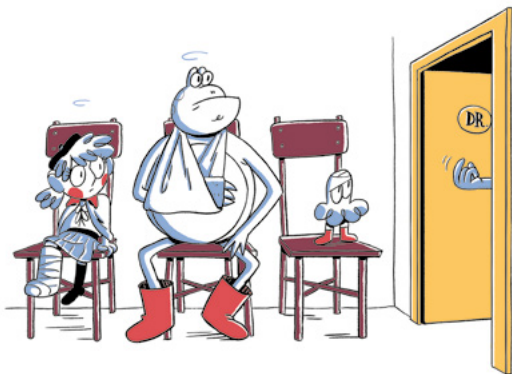
Once you find unmet needs in your human network, try a  **Promise Proposal** to understand them in greater detail or a  **Better Now** to make a plan to address them.

Human Network

1. Gather your team and write 'Our Team' at the bottom of your workspace.
2. In the space directly above, work together to write down the names of all the individuals and groups who count on your team for something. Make sure to include:
 - a. People inside the organization. *For example: managers, departments, coworkers, etc.*
 - b. People outside the organization. *For example: customers, influencers, auditors, etc.*
3. Go up one more level: for everyone you identified in the last step, who is counting on them? Add more names above your previous answers, then repeat this step, building upward until you hit the edge of your knowledge.
4. Work together to draw lines between names wherever there are relationships. Who is connected to whom?



5. Review the whole network as a group, one name at a time. For each name, discuss:
 - a. What are their 1–3 biggest needs?
 - b. What happens if their needs go unmet?
 - c. Are their needs being met right now?
6. Draw a star next to names with unmet needs. Remember: unmet needs always have consequences. Even if there's nothing you can do to meet those needs, it's worth being aware of them.



Seeking Specifics

Identify all the different parts of your organization, so you can figure out what hurts and get help to make it better.

Imagine you go to the doctor because you're in terrible pain. If you say something like 'my elbow hurts', you'll get prompt treatment. If, however, you can't tell them where the pain is, it will take much longer to get relief. It's no different at work! Learn how to understand all the moving parts in a system to be able to communicate effectively about problems and find a solution, together.

Seeking Specifics



1. As a group, make a list of all the major 'parts' of your organization on your workspace. Include everything involved in delivering value to your customers, users or other stakeholders.

Include the work you do, practices you follow, technology, knowledge, data or anything else that helps deliver value to the people who depend on you.

2. Pick one item from that list and break it down into a second list of smaller parts. Repeat this, adding to the second list, for each item in your first list.
3. Evaluate the health of each of those smaller parts in your second list by rating them on a scale from 1–4, where one causes you terrible pain and four is perfectly healthy. Record this number next to each part.



Tip: if you find it hard to agree on where a part fits on the scale, try breaking it down into further subparts.

4. Now that you know what hurts, point out the pain so others can help! Use  **Complaint Department** to investigate the painful areas further. Then use  **Value Chain** to design a healthier way to fit all the parts together.



Promise Proposal

Understand what needs people expect you to meet, so you make promises you can keep.

When you promise to meet your stakeholders' needs, you have to follow through! But even when you don't make an explicit promise, they might use their expectations to fill in the blanks. And if you can't keep a real (or imagined) promise? You'd better propose something else.

Need help identifying the people whose needs you must meet? Try a

 **Human Network** exercise!

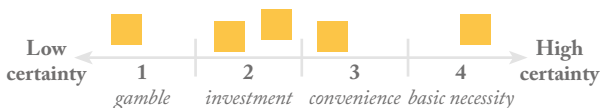
Promise Proposal

1. As a group, identify the human needs you meet through your work (anything goes). Write them down, one per sticky note. For example:

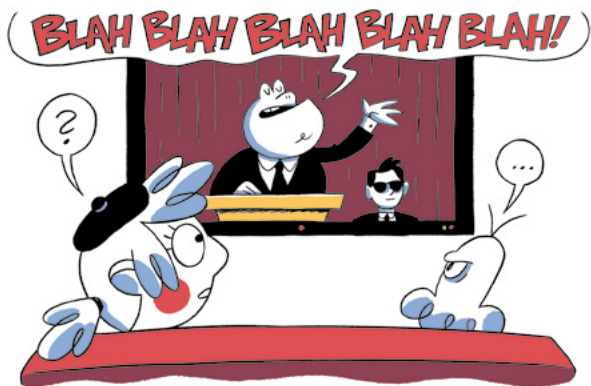
*quench thirst be liked find housing make money relieve pain
find friendship stay alert increase confidence get promoted*

Tip: if you get stuck, try listing out specific people first. Who are they, and what do they get from you?

2. Sketch the below template, then sort each sticky note along the scale. Which number best represents people's expectations of the promise you're making?



3. Assess how well you meet each need. After all, every need is a promise kept or broken! Ask "How well do we fulfill this promise today, given what people expect?".
4. Assess whether it's the right promise to be making.
 - a. If it is, make sure you're living up to your promise.
 - b. If it isn't, decide together whether to break the promise, renegotiate it, or replace it with something else (✳️ **Take Responsibility** can help).
5. Check your findings by discussing them with a diverse group (✳️ **Measure Twice** can help). Repeat this tactic often to ensure you're keeping your promises, and making promises you can keep!



Buzzword Breakup

Replace false understanding with true agreement by driving empty words out of your conversations.

The trouble with buzzwords is that they mean different things to different people, littering our conversations with guesswork. This tactic gives you everything you need to either make buzzwords more meaningful – or get rid of them altogether.

Buzzword Breakup

1. Invite everyone to write down all the buzzwords and ambiguous phrases they've heard at work recently, one per sticky note.
2. One by one, place the notes on your workspace in order, from least confusing to most confusing. For example:



3. Choose the most confusing buzzword and list all its different meanings. Work together to identify each distinct meaning, then record them in a shared document to create a glossary of terms.

For example: *'digital' could mean replacing paper forms with online processes, or making a website, or computer literacy.*

4. Your newly discovered meanings won't stick if the buzzword is still easy to use. Make a plan together to make it harder to say the buzzword. Here are a few ideas:
 - a. Slow yourself down. Never use the buzzword quickly. Instead, pause the conversation to briefly clarify what you mean.
 - b. Slow others down. When you hear the buzzword, ask for clarification, referencing your glossary to help narrow things down.
 - c. Bring everyone to a stop. Make an explicit request that nobody use the word. It may be frustrating at first, but it can help force the discovery of new, more meaningful language.

To discover more ways to improve your conversations, try

✦ **Changing Ways** to shift from old buzzwords to new terms.












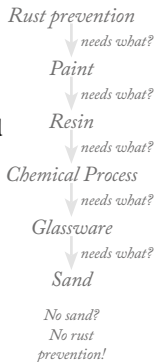
Five Whats

Find the risks deep in your supply chain by asking “...and what does that depend on?” at least five times.

Your supply chain is only as strong as its weakest link; ignore this at your peril! Luckily, even imperfect knowledge will serve you far better than total ignorance. Use this tactic to find out how deep your dependencies go, so you can identify and shore up your weaknesses.

Five Whats

1. As a group, choose one key process, tool, advantage or other 'asset' that must be protected at all costs. ( **Seeking Specifics** can help you create a list to choose from). Write this at the top of your workspace.
2. For that item, ask "What does it depend upon?" and record the answer underneath. This is your first layer of dependency.
3. Repeat the question: "What does it depend upon?" for the first dependency – this creates your second dependency. Repeat until you have asked 'What' a total of five times. This gives you a five-layer cross-section of supply-chain dependencies.
4. Mark dependencies with a high risk of failure with an exclamation mark (!). Mark those that you don't know enough about to assess their risk of failure with a question mark (?).
5. Plan next steps to address what you've found.
 - Exclamation marks you can control? Investigate with  **Complaint Department** and resolve with  **Better Now**.
 - Exclamation points you can't control? Set up  **Tripwires** to warn of collapse, then consider  **Building Bridges** or loosening your commitments with  **Embrace The Change**.
 - For question marks, try to model it from the outside with  **Mystery Machine** then learn everything about it with  **Open-Source Intelligence**.
6. Use  **Value Chain** to revisit each layer and add more answers to help you fully understand the whole chain.






Value Chain

Sketch out a system to prove to yourself that you understand how it works.

Do you truly understand the situation, or are you just overconfident? Prove it! Sketch your theory about how the system works for others to see, understand and critique. You likely know less than you think, but what you learn along the way will be invaluable!

Run a  **Five Whats** exercise to get a sense of how deep your *Value Chain* goes, then run this tactic to expand on it.

Value Chain

1. Ask your team: "Who is the business for?". Write one user, customer, stakeholder or other beneficiary on a sticky note and place it at the top of your workspace.
2. What do they get? Write one benefit, value or met need they get from the situation on a sticky note and place it directly underneath the 'Who'.
3. How do they get it? Write down one activity that gets performed in order to meet the need on a sticky note and place it underneath the 'What'.
4. Draw lines connecting the Who to the What and the What to the How. Test the resulting Value Chain by reading it from top to bottom, replacing each connection with the phrase 'depends on'.



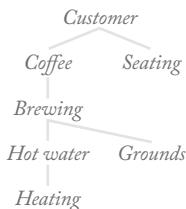
"Customer depends on Coffee. Coffee depends on Brewing."

The Sentence Test: does the Value Chain make sense when read out loud as a sentence? If not, change it until it does!


5. Expand the Value Chain with more Hows, Whats, or even Whos, connecting them together to pass the Sentence Test.

Consider adding new kinds of Hows, like technologies, practices, data, knowledge, etc.

Keep going until you have a convincing design that describes the situation. Then share it more widely for feedback.



"Brewing depends on Hot water and Grounds. Hot water depends on Heating."

 **Measure Twice** can help you with this.



Fog Of Work

Make your decisions more strategic by widening your field of view beyond what's right in front of you.

When you've got an important job to do, it's easy to make great decisions that end up being not-so-great for people you don't even know exist. This tactic helps you clear that 'fog of work' so you can design strategies that make intelligent trade-offs that work out better for everyone.

Fog Of Work

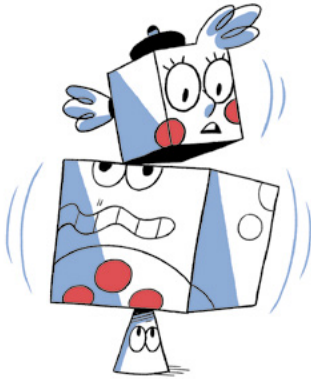
1. In the middle of your workspace, write down an important job you do (e.g., write code, load trucks, manage projects, do surgery, etc.).
2. Draw a circle around your job to create a boundary. The inside is your workspace, and the outside is the rest of the world.
3. Imagine you've never left your workspace. The only way to learn about the world is to examine the 'packets' that enter and leave:
 - a. Inbound packets: inputs that enter the workspace, like supplies, information, equipment, etc. – everything you need to do your job.
 - b. Outbound packets: outputs that leave the workspace, like any work product, subassemblies, information, code commits – anything you produce by doing your job.



For each packet, draw an arrow entering or leaving your workspace, and label it with the packet's contents.

4. The existence of those packets shows we aren't alone – there must be other workspaces out there! At the other end of each arrow, draw an empty circle to represent a workspace that must exist.
5. Pick an empty workspace to explore – go there (on paper, if not in person). What important job happens there? Label it accordingly.
6. Repeat the process from step 2, but from the perspective of the newly explored workspace (🔗 **Open-Source Intelligence** may help you find answers). Just like that, the fog of work will start to lift!

*Tip: try 🌸 **Building Bridges** with other workspaces. Then run a 📁 **Small-Batch Strategy** for the big picture, and share it for critique with 🌸 **Measure Twice**.*



Building Blocks

Evaluate the core parts of your business to make sure you're building on solid ground.

When you're busy creating value for the world, the last thing you need is for your foundations to fail. Inspect your building blocks for signs of weakness to prevent everything collapsing like a house of cards!

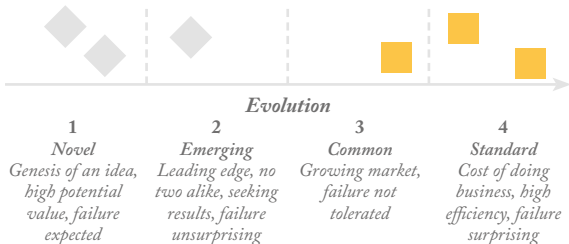
You may find it helpful to run  **Five Whys** before this tactic to get a sense of what you depend on.

Building Blocks

1. As a group, review your system design and point out each distinct part that must be functioning in order for the whole thing to work.

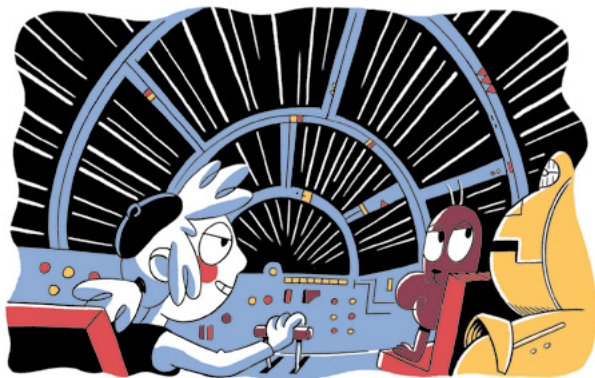
*Tip: if you don't have a design yet, first make a 🧱 **Value Chain**.*

2. Place each part along the template below (📍 **Market Evolution** may help):




3. Review your Common and Standard parts. These are good building blocks, because they are reliable. Any system that depends on them can improve quickly by limiting where failure is likely to occur:
 - a. investing to keep them reliable (or buying from/outsourcing to the best in the industry)
 - b. using them to build Novel and Emerging things that create new value
4. Review your Novel and Emerging parts. These are not good building blocks, because they are unreliable. Any system that depends on them will become less reliable as a result. (However, sometimes that is a necessary trade-off!) Make the most of them by:
 - a. making sure they are supported by strong building blocks (Use 🧱 **Five Whats** to help)
 - b. investing in improvement to make them more reliable and common, so they might one day become building blocks themselves.

*Tip: unless you're an industry-leading provider for your building blocks, consider revising your design with the assumption that you'll buy or outsource them instead (use 🛠️ **Why DIY** to confirm).*




Fast-Forward Futures

Follow the predictable path of  *Market Evolution* to anticipate tomorrow's innovations based on today's market.

Everything inside capitalism evolves or dies. Let's speed up that process by imagining a world created by the survivors! What does it look like... and will we still be around to enjoy it?

Try  *Market Evolution* for a refresher on the forces behind this evolve-or-die dynamic.

Fast-Forward Futures

1. Work together to make a list of the key elements of your work – the most important ideas, processes and technologies you use to create a better world. ( **Seeking Specifics** can help.)
2. Prompt the group to speculate about an item from the list: “Fast forward 10 years! What is the key element like when it’s all grown up?” (Already grown up? Pick something else.)
3. Together, pick a basic human need, like food, shelter, acceptance, creative expression, etc. Then prompt the group to speculate even further: ‘Fast forward 20 years! What new ways to meet that need are possible, now that the key element is mature, stable, widespread, inexpensive and increasingly taken for granted?’
4. Use the template below to document the possible innovations:

“In the future, key element could meet need if someone used it to build innovation”

For example, in the future...

- *Delivery robots* could meet *healthcare needs* if someone used them to build *mobile pharmacies*.
- *Artificial intelligence* could meet *education needs* if someone used it to build *per-student unique test generation*.
- *Keyless entry technology* could meet *clothing needs* if someone used it to build *work uniform-based ID access management*.


While this isn’t ‘the’ future, you now have some great ideas about what could happen based on anticipatable market dynamics.



Tip: take this tactic to the next level by running it multiple times, adding and fast-forwarding each new invention within the same imagined world.



Market Perspectives

Get aligned on the type of market challenge you're facing to get everyone moving in the same direction.

Different stages of  *Market Evolution* offer different challenges; if your team disagrees about where you are today, you'll feel constant friction from everyone pulling in different directions. Use this tactic to get your disagreement out in the open, so everyone can have a collective 'Ah-ha!' moment and finally start moving in the same direction.

Start with  *Value Chain* for the product or service you intend to explore. Once your team's on the same page, try  *Just Right* to work through the implications of your new beliefs about evolution.

Market Perspectives

1. Draw the below template on your shared workspace.



2. Select a product or service from your organization for the group to evaluate, then read out the script below:

[Product or Service] is in one of four stages of evolution:

Stage 1: Genesis (rare, uncertain, failure is tolerated),

Stage 2: Custom (no two alike, rapid learning, failure is disappointing),

Stage 3: Product (common, repeatable, failure is not tolerated),

Stage 4: Commodity (standard, optimized, failure is surprising).

*Tip: if any of these words don't resonate, substitute with alternatives from 🌀 **Market Evolution**.*

Without sharing or discussion, ask each person to silently write on a sticky note the stage they think fits best. Invite everyone to add their note to the template at the same time. (No changing answers!)

3. With the full spectrum of beliefs now visible, invite someone from each of the selected stages to advocate for their point of view: "Why that stage?"
4. Read out the market challenges below that correspond to the stages of evolution. Then discuss as a group: Which challenge do we have?

Stage 1: discovering a new, never-before-seen source of value,

Stage 2: making it profitable, or seeking a return on investment,

Stage 3: maximizing profit and/or growth,

Stage 4: increasing efficiency and volume under shrinking margins.

*Tip: if there's disagreement, use 🌀 **Vendor Disassembler** from the perspective of your customer to break your product or service down into multiple parts, and then try again!*



Market Evolution

Spot the market forces in action around you, so you can ride change like a wave – instead of getting smashed by it.

Global-scale competition puts pressure on everything to evolve. If there's a benefit to making something better, someone will be trying to make it happen. As a result, things that are rare and risky today can become common and boring tomorrow... if they survive!

Tip: think of how air travel has changed since the days of the Wright Brothers! And whatever happened to flying cars?

Follow this tactic up with  **Market Perspectives** to use this knowledge to build alignment within your team.

Market Evolution

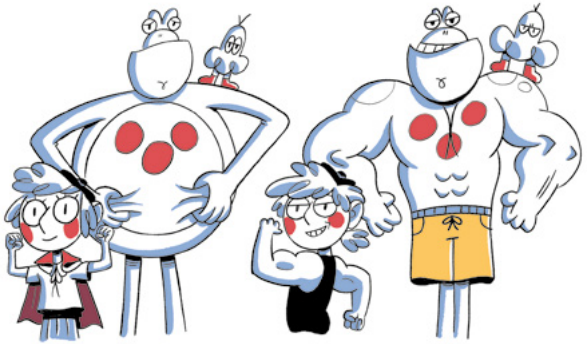
While we like to tell heroic stories about risk-takers who invent the next big thing, it's safer and far more common to make small improvements to things that already exists. Why do we do it?

In capitalism, profit is the main measure of success – maximum money in (i.e., revenue) and minimum money out (i.e., expenses, taxes, etc.) – but there are other motives at work in the market, too: fame, power, survival, care for others, or just wanting to make the world a better place.

All these things add up to create a constant pressure on everything in the market to evolve from left to right:

1	2	3	4
Genesis	Custom Built	Product (+ rental)	Commodity (+ utility)
unmodeled	divergent	convergent	modeled
rare	slow spread	rapid spread	common
poorly understood	explosion in learning	explosion in use	well understood
wonder and discovery	education and awareness	maintenance and operations	accepted as a given
high potential future failure	confirming the value	maximizing profit	high volume, shrinking margins

1. Pick any business activity, technology, data set, body of knowledge, etc. to examine (👁️ *Seeking Specifics* can help).
2. Review the qualities of each stage of evolution, 1–4 above, until you find the stage that fits.
3. Review the rest of the qualities in the same stage. One quality implies the rest! For instance, *novel practice* implies *wonder and discovery*. Study each one and notice what you learn about the thing you're examining!



Embrace The Change

Overcome resistance to change by recognizing why change can be painful and how to move forward.

Sometimes, we have to change. It's not easy; we often have much to lose! Instead of pushing people harder, use this tactic to understand why change might hurt.

"Is it really a fact that people resist change? Maybe people examine the proposed change and if they think that change is good, they accept it. If they think the change is bad, they resist it. What do you think about that?" – Eliyahu M. Goldratt

Embrace The Change

1. Pick a big change that's on its way, and work through each question below as a group. Write down your answers, one per sticky note, and add them to the workspace with plenty of space around each one.
 - a. How is it going to take extra work for people to understand the change? *Why is everyone talking about [insert new technology here]? My [insert old technology here] works just fine. Bah!*
 - b. How will the change force people to discover something unpleasant? *We are #1 in the industry, but revenue has declined two quarters in a row. Things will get back to normal soon, right? (Famous last words.)*
 - c. How will the change cause people to lose power or control? *They want me to learn this new skill... That must mean they don't need my current skills anymore. I basically have to start my career over; I didn't agree to that!*
 - d. How will the change cause people to lose relationships? *I don't care if it's cheaper and more reliable... They won't give us a dedicated account manager! Who am I going to talk to if something goes wrong?*
 - e. How will the change cause people to feel less valued? *We've already spent so much time on this wasteful initiative... and it's my fault. If I call it off now, it'll only prove that they can't trust me!*
 - f. How will the change cause people to lose rewards? *If I realign my goals to this new information, I'll miss my original performance targets, and then I won't get my bonus.*
2. Review each answer one by one, together:
 - a. To the left of the answer, identify the people who will feel that pain the most, one per sticky note.
 - b. To the right, discuss and record ideas about how to reduce their pain or provide them with a benefit that balances it out.
3. Make a plan to try as many of your ideas as you can. It may seem like a lot, but that's why change is hard!



Big Frog, Little Pond

Focus on the smallest, simplest way to get things done, to protect yourself from nimbler competitors.

Successful companies can afford to waste time on the occasional vanity project or feature war, but beware! Quick and careless growth in times of abundance can set you up to starve when a drought arrives. Instead of “do more with less”, get some practice doing less with less, while there’s still time to cut back!

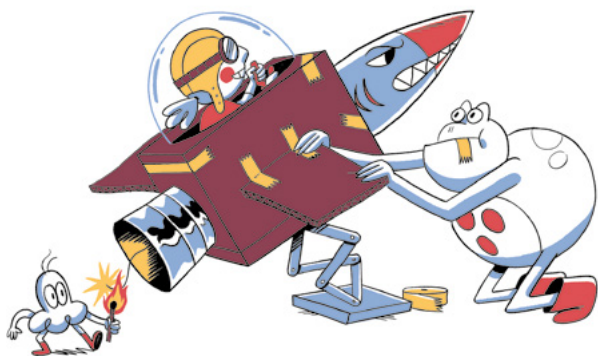
Before this tactic, try  **Close Up Shop** to reconnect with your purpose. Follow up with  **Small-Batch Strategy** to move towards a more competitive position.

Big Frog, Little Pond

1. Gather your team around a dry-erase board or virtual collaboration space, then set the scene:

"Imagine that we're a big frog in a little pond, well fed and safe from predators. All is going well, until one day, when a small, brightly colored competitor comes splashing in. They're faster, nimbler, and hungry for our flies! To make matters worse, a dry season is coming, and that means fewer flies to go around."



2. Work together to identify your current commitments. What are all the products, services and projects you have underway? Write them down, one per sticky note.
3. For each commitment, answer the following questions:
 - a. **Who** is it for? (Which user, customer, beneficiary, etc.)
 - b. **What** do they get? (Benefits, value, needs met etc.)Record as many answers as you can, one per sticky note, and place them next to the corresponding commitment.
4. Ask the group to imagine the smallest set of Whos and Whats that a competitor would need to win to be a threat? Circle them in the workspace.
5. Work together to discuss the implications of what you found:
 - Are you currently at an advantage or a disadvantage compared to the competitor?
 - Which of your existing commitments make you particularly big, slow and harmless?
 - How could begin a transition... between 'big and harmless' and 'small but deadly'?



Why DIY?

Decide which parts of your system to build, buy, and outsource with a simple points-based market assessment.

In decades past, the only sure way to succeed was to build everything yourself. In today's interconnected market, however, doing that will just make you slower and more expensive than everyone else. So you should outsource everything, right? No! Instead of taking a one-size-fits-all approach, this tactic helps you design just the right blend of building, buying and outsourcing to create a competitive modern organization.

Before this card, consider a quick refresher on  **Market Evolution**. Use  **Market Perspectives** to survey current options in the market.

Why DIY?

1. Working alone, answer these questions about the component you wish to make a build/buy/outsource decision about:

How widespread is the thing in its applicable market?

- | | |
|---------------------|----------------------|
| a. Rare | c. Rapidly spreading |
| b. Slowly spreading | d. Common |

How well do people in that market understand it?

- | | |
|------------------------------------|-----------------------------------|
| a. They don't understand it at all | c. They're using it more and more |
| b. They're learning about it | d. They completely understand it |

What are publications saying about it?

- | | |
|--|---|
| a. "What is this thing?" | c. "Here's how to use and maintain it." |
| b. "Here's what it is & how it works." | d. It's far too ordinary to talk about. |

Tip: if the questions are difficult to answer, break the thing down into smaller parts and try again, one part at a time.

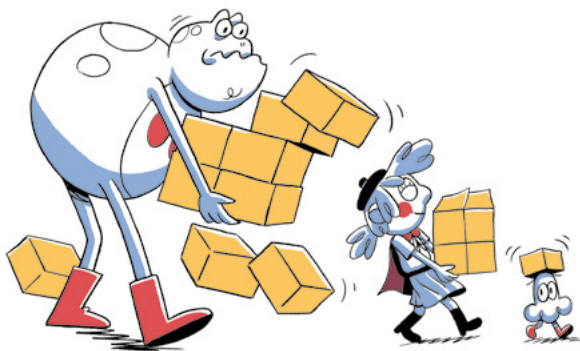
2. Find the best approach for the component by adding up each answer.

a = 1 point b = 2 points c = 3 points d = 4 points

3–6 points: Build it! DIY is your best (and only) option. After all, it's too early in its development to be available for purchase as a product or service. The only way to get one is to build it!

7–9 points: Buy it! Unless you can compete and win, don't bother building it. Buy an off-the-shelf product instead, or at least copy an existing solution. (We generally underestimate the true cost of ownership, so make it someone else's problem if you can!)


10–12 points: Outsource it! It's too late to compete. The race to the bottom (highest volume, lowest price) has already begun, so let the experts handle it! It may be unpleasant to not have much of a say in what you get, but the trade-off in reliability is likely worth it.



Vendor Disassembler



Make clear-eyed purchasing choices by matching supplier offerings to specific needs in your design.

We don't have to fall for overstuffed feature lists, cheap pricing tricks, or friendly salesperson courtship. If we get clear on what we need from a vendor, we can fit them into our design – not the other way around.


Use  *Why DIY?* to evaluate each part of your design for parts that make sense to purchase or outsource.

Vendor Disassembler

Choosing a supplier is not just about getting a good deal. It's about understanding how vendor relationships change the design of your systems, teams, workflow, etc., and not always for the better!

1. Sketch the current design of the system ( **Value Chain** can help), then point out the parts that could be satisfied by a vendor.
2. List the vendors that offer one or more of the key parts required in your design.
3. Vendors usually sell a bundle of parts marketed as a single solution. This can make it hard to tell what you're getting! So, break each vendor offer down into smaller parts. Take a look at  **Mystery Machine** if you get stuck.
4. Make copies of your design, one for each vendor. Here's the hard part: every vendor will offer a mix of things you do want, things you don't want, and things you could want. This will change your design, and that's what actually matters for your final evaluation.

Adjust each copy of the design to make the best use of that vendor's unbundled parts.

5. Compare the designs for each vendor and make a decision. Each design will have associated costs and trade-offs. Which design, with which vendor, seems most favorable? There aren't always easy answers, but  **Measure Twice** can help you make sure you've got it right.

Tip: you may need multiple work sessions for this tactic. Yes, it's a lot of work, but it's way less painful than making the wrong choice!



Buyer's Remorse

Avoid unpleasant surprises in purchasing and contracting by setting realistic terms.

Don't get caught in a bad deal. Instead, proactively negotiate appropriate terms. Sometimes it's best to minimize the cost per unit, while other times all you can hope for is time and materials spent well. This tactic helps you get the terms right from the very beginning.

Buyer's Remorse

1. Pick a product/service that you buy, sell or use and answer these questions to find out which purchasing terms you should use.

How are people who work in this industry generally perceived?


- a. bold, brave, reckless
- b. experts in their craft
- c. professionals in well-defined field of work
- d. invisible, essential, underappreciated

How developed is the market?

- a. Undefined
- b. Forming
- c. Growing
- d. Mature

How do people who use or rely on it perceive it?

- a. Surprising and exciting
- b. Leading edge
- c. Disappointing if not available
- d. Shocking if it's not available

*Tip: questions too difficult to answer? Break the product/service into smaller parts using  **Seeking Specifics** and try again, one part at a time.*

2. Find the best approach by adding your scores for each answer:

a = 1 point b = 2 points c = 3 points d = 4 points

3 to 4 points: Time and Materials. Uncertainty is very high, so the work can't reasonably be estimated or even guaranteed to succeed. Set a budget and make an agreement to pay on a 'Time and Materials' basis.

5 to 7 points: Outcomes. We know what we want, but not how to get it. Structure the contract so payment is based on the achievement of specific target outcomes. Wherever possible, create partnership opportunities by sharing the risks and rewards of the effort.

8 to 10 points: Fixed Cost. Pay a flat fee for a service, or buy a Commercial Off-The-Shelf (COTS) product.

11 to 12 points: Unit/Utility. Pay by how many units you get or how much of a metered utility you consume (e.g., power by the kilowatt-hour).



Experiment Methods

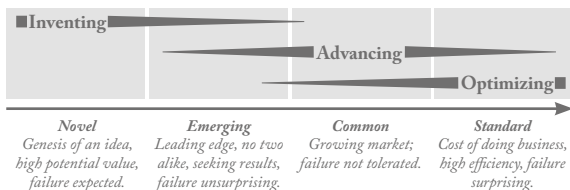
Design the right kind of experiment for every situation, so you learn as much as you can, every time.

Some experiments help with discovery and invention. Others are better for advancing and improving existing ideas, while others still are best for fine-tuning and optimization. Use this tactic to figure out exactly which kind to run, when, and why!

Before this card, use  **Market Evolution** to find out which stage of evolution fits your experiment subject best.

Experiment Methods

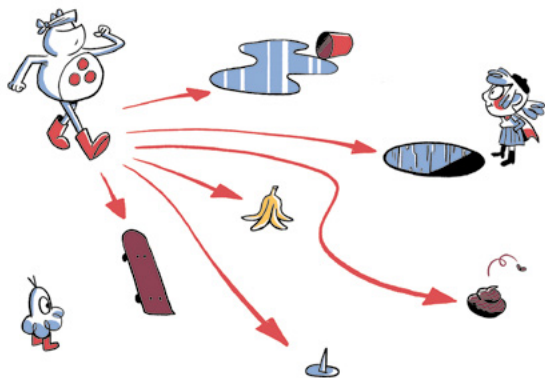
- Choose the subject for your experiment. What are you experimenting on? Plot your subject on the diagram below to match it to the right experiment type – **Inventing**, **Advancing** or **Optimizing** (🕒 *Market Perspectives* may help).



- Plan your experiment by choosing key questions for both before and after the experiment. Use the table below for inspiration, pulling from **Inventing**, **Advancing** or **Optimizing** questions as appropriate.

	Before Questions	After Questions
All Experiments	<ul style="list-style-type: none"> What will we try? What do we expect to happen? 	<ul style="list-style-type: none"> What actually happened?
Inventing Experiments (Looking for value)	<ul style="list-style-type: none"> What bet are we making? What is the smallest thing we can do to get the quickest feedback about that bet? 	<ul style="list-style-type: none"> What do the results say about our bet? Should we continue this bet, or change direction?
Advancing Experiments (Taking found value and improving it)	<ul style="list-style-type: none"> How are things right now? How do we want things to be? What's standing in our way? What will we try, in order to overcome it? 	<ul style="list-style-type: none"> What was surprising about the results? What should we try next?
Optimizing Experiments (Taking refined value and perfecting it.)	<ul style="list-style-type: none"> What variable do we want to control? What do we want it to do? What inputs will we provide to produce that effect? 	<ul style="list-style-type: none"> Did it work? Why, or why not? What adjustments to the system do the results suggest?

- When your experiment ends, consider running a 🚩 **Better Now** followed by a 📅 **Decision Diary**, based on what you learn.



Disruption Readiness

Prepare a competitive response to disruption, so you can overcome the threat of future irrelevance.

Disruption is deadly. But is it predictable enough to be avoided? Yes! Also... No. That's because there is not one, but two kinds of disruption. This tactic helps you recognize and prepare for both, so you have the best chance of surviving a future disruption scenario.

"The concept of disruption is about competitive response; it is not a theory of growth." – Clayton M. Christensen

Disruption Readiness

In growing markets...

It's easy to succeed and make a profit just by having better features or differentiating qualities than a competitor. As a result, disruption happens quickly and without warning. Since you can't know what will happen or when, the best defense is the ability to recognize disruption when it's happening, let go of previous success, and push in a new direction quickly.

1. Invest in horizon-scanning capabilities; make it easy to notice changes in competitor action or customer needs. 🌸 *Tripwires* based on 🌟 *Open-Source Intelligence* can help.
2. Be prepared to acquire the competition, copy them quickly, or reinvent your organization and push in a new direction. 🏠 *Feasible Futures* can help.
3. When this kind of disruption does finally happen, expect fierce internal resistance to change, so prepare accordingly. 🌟 *Legacy Trap* and 🌟 *Embrace The Change* are useful here.

In maturing markets...


Differentiation only gets harder and harder. In the coming months or years, the last thing left to compete over will be price, kicking off a race to the bottom. Disruption still happens suddenly, but no one can claim they didn't see it coming. Since you do know what will happen (a price war and consolidation down to fewer and fewer players) just not exactly when, the best defense is to make the most of the time you have left to get prepared.

1. Do what it takes to build up the organization's strength in improvement and optimization work. Aim for high gear with 🌟 *Shift Gears*, and use the right 🌟 *Experiment Methods*.
2. Stay laser-focused on increasing certainty, increasing volume and lowering cost. Use 🎯 *Promise Proposal* and 🔄 *Market Evolution* to get the benefits of pushing 'to the right'.
3. Prepare the option of a graceful exit, just in case. 📦 *Small-Batch Strategy* can help you create a new path forward.



Legacy Trap

Manage the decline of your legacy systems, so you can make the most of the past without compromising your future.

All systems begin to fall apart the instant they are built. Even with maintenance and care, things don't last forever; the unstoppable force of  **Market Evolution** only needs enough time to make any system obsolete. It's a delicate balance: investing in legacy vs transitioning to something modern. Use this tactic to find that balance, especially for processes, technologies, or other designs that have seen better days.

Having trouble adjusting your approach to legacy systems? Have a look at  **Embrace The Change** for tips on what might be holding you back.

Legacy Trap

1. Gather together around your workspace, and on sticky notes, list out all your legacy systems – every process, technology, or other design you believe to be outdated (or headed in that direction).
2. Determine the impact of each legacy system by making a second list, this time of all the other systems that either depend on your legacy systems or would be affected by their absence.
3. Work together to assess the decline of each legacy system in your first list, using the below spectrum. Write down the decline score (1–4) next to the corresponding system.

Low Decline
Stable, valuable,
and well-
maintained

Still working,
but starting to
degrade.

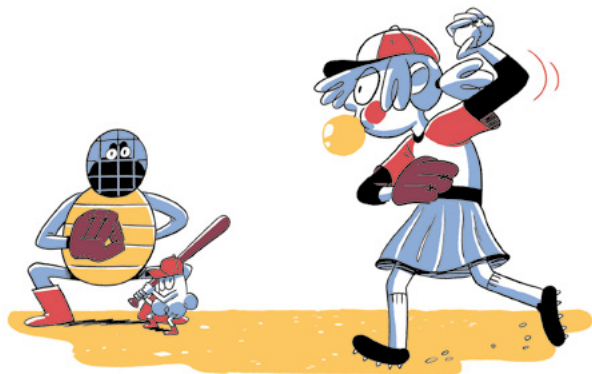
Failing, with an
uncertain path to
stability.

High Decline
Failed, and path to
stability impossible
or unwise.



4. For each legacy system, match the approaches below to the degree of decline identified above (see the suggested approach key above). Then, decide on next steps together.
 - a. Ongoing Maintenance: make small, proactive investments to keep things running smoothly.
 - b. Targeted Investment: decide whether to make a serious investment to make it more maintainable, or to begin the process of replacement. In either case, a gradual change, bit by bit, is appropriate.
 - c. “Big Bang”: fix all the problems in one big effort, rebuild it from scratch, or make a last-ditch attempt to replace the whole system with a modern alternative.
 - d. Disposal or Exit: if the system can’t be saved, get rid of it by any means before it drags you under. (Revisit your 🧰 **Value Chain** above to minimize the impact.)

*Tip: follow this up with 🧠 **Better Now** to act on your chosen approach!*



Adjustable Attitudes

Help teams find the right blend of approaches, so that what they bring to the table matches exactly what the work needs.

Organizations need diversity in order to respond effectively to challenges. Different backgrounds, walks of life and areas of expertise are important to consider, but an oft-overlooked dimension is attitude. It's not about how pleasant you are to be around. It's about how you approach different kinds of work! You need the right mix of invention, advancement and optimization attitudes. Help your team members lean into their natural strengths while managing this balance well.

Adjustable Attitudes

1. Gather your team around a workspace and identify your distinct areas of responsibility. Write them down, one per sticky note.
2. Review the attitudes below. Then pick a responsibility and ask “Which attitude do you think works best for this responsibility?” Have each person vote by writing ‘I’, ‘A’ or ‘O’ on a sticky note and placing their vote near that responsibility. Repeat the process for the rest.

Invention (I)

Make the impossible

Explore and try
new things

Fail a lot

Big bets

Advancement (A)

Turn a lucky

discovery into
something useful

Listen to users and
build

Improve a lot

Market analysis

Optimization (O)

Scale it all the way
up and make it all the
way cheap

Just build what is
required

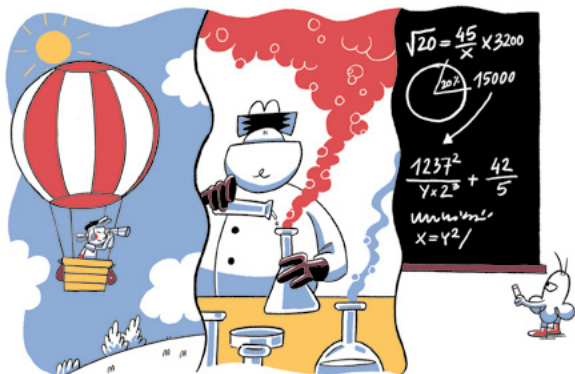
Make efficient

Metrics!

3. Ask each person to silently reflect: “Which attitude or attitudes do you prefer, most of the time?” After a moment, ask them to share their answer by writing ‘I’, ‘A’ or ‘O’ on a sticky note. This time, they get three sticky notes to allocate however they want.

Tip: always ‘Invention’? That’s three ‘I’s! Mostly ‘Invention’ and sometimes ‘Advancement’? ‘I’ twice and ‘A’ once. It’s an art not a science; don’t sweat it!



4. Count and reveal the breakdown of the team’s preferred attitudes.
5. Invite a comparison: “What ratio of attitudes do the responsibilities need? And what ratio does our team have?”
6. Decide together if your team’s attitude blend should adjust. Since attitudes are not fixed or permanent, make a plan to enable new attitudes to flourish. For example, to promote:
 - a. Invention, make it safe to try new things, fail and try again.
 - b. Advancement, reward waste reduction and learning from users.
 - c. Optimization, work to make the right metrics visible.



Shift Gears

Match your way of working to what the situation needs, so you don't stall out or run out of gas.

When we use the same approach in every context, we're bound to get ourselves in trouble. Agile doesn't work in all situations. Neither does Lean, nor Six Sigma. This tactic helps you play to each method's strengths, so you have the right approach at the right time. The trick is knowing exactly when to shift gears!

This tactic is based on  **Market Evolution**. To explore other related tactics, take a look at  **Just Right**.

Shift Gears

1. Evaluate a process, technology, design or area of work by answering:

What is its market driven by?


- a. Gambling, gut feel
- b. Exploring a 'found' value
- c. Analysis, listening to customers
- d. Making it the same every time

How do people choose between alternatives?

- a. Guesswork
- b. Trying stuff, learning from others
- c. Evidence, better features
- d. Cheapest, fastest, etc.

What value do the people working on it see?

- a. The potential for future value
- b. A competitive advantage
- c. Not being left behind
- d. Can't survive without it

Tip: questions too difficult to answer? Break things down into smaller parts with  Seeking Specifics, then try again for each part.

2. Add up the score for each answer to get your total.

a = 1 point b = 2 points c = 3 points d = 4 points

3–6 points: Low Gear. Bumpy, unexplored terrain ahead! You're going to get things wrong, even if you do your best. Plan to change direction regularly based on new information! Look to agile approaches like Extreme Programming (XP) for inspiration.

7–9 points: Middle Gear. You're on a hopeful dirt road – you've found a source of value; now it's time to refine it! Learn as much as you can in order to increase repeatability and reduce waste. See: improvement-centred approaches (e.g., Lean, the Toyota Production System).

10–12 points: High Gear. Smooth roads mean high speeds! Time to scale things up and push costs down. To win the race, minimise deviation and reduce failure to an absolute minimum. This is where approaches like Six Sigma really shine.



Changing Ways

Get the full benefits of switching to something new by switching your habits, too.

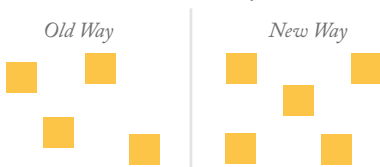
To adopt a new technology or way of working, we must revise the rules, guidelines and norms that made the old way successful. After all, the new way will fail if it's held back by old policies and practices that no longer make sense.


“What benefits will any technology bring, if we neglect to change the rules?” – Eliyahu M. Goldratt

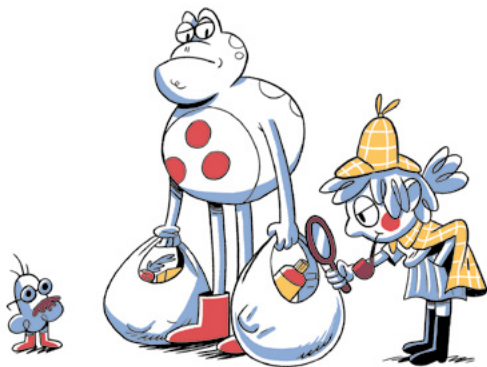
Follow this up with  ***Embrace The Change*** to work through other common challenges caused by commitments to old ways.

Changing Ways

1. Gather your team around an empty workspace, divide it in two as shown, and distribute sticky notes.



2. Set the scene for everyone by describing the change that is underway: What were we doing before (the 'Old Way')? And what will we do after (the 'New Way')?
3. Now work together to identify the practices supporting the 'Old Way'. Write each practice down, one per sticky note, and place it on the left side of the workspace.
 - What explicit rules did we follow?
 - What unspoken norms or habits did we develop?
 - What other practices or changes to our work did we adopt to make the 'Old Way' work?
4. Identify practices that must change to support the 'New Way'. Write each change down, one per sticky note, and place it on the right side of the workspace.
 - What practices will we need to stop doing?
 - What practices will we need to change slightly?
 - What new practices will we need to invent or copy from others?
5. Use  **Better Now** to make a plan to put this New Way into action.



Open-Source Intelligence

Use publicly available information in order to find opportunities hidden in plain sight.

Explore market opportunities like Sherlock Holmes explores mysteries. Start with informed guesses, then seek out evidence “to the contrary, my dear Watson!”.

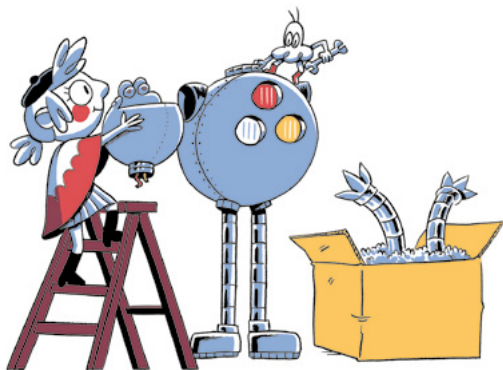
“You have access to more data than you think – it might just involve some resourcefulness and original observations.”
– Douglas W. Hubbard, *How to Measure Anything*

Open-Source Intelligence

1. On your own, choose a target organization to inspect. (It can be a competitor, peer, vendor, customer or any other organization you'd benefit from understanding.)
2. Model the target's basic operations with three simple lists:
 - a. Who benefits from the target's work?
 - b. What value do they get from the target?
 - c. What kinds of work does the target do to provide that value?

Tip: if you don't know the answers, make an educated guess!

3. Choose a public source of information from the options below, then start reading about the target:
 - a. official web sites ('About' pages, blog posts, etc.), including historical archives,
 - b. open positions on job sites,
 - c. investor relations (earnings calls, financial reports, etc.),
 - d. press releases, podcasts, interviews,
 - e. articles and social media from industry analysts and beat reporting,
 - f. employee social media, forums and other external rumor mills.
4. Update your model as you learn new things about the target. If it gets too complicated for the list format, try converting it to a 🗃️ **Value Chain** (and later, a 🗺️ **Wardley Map**).
5. Repeat the process from step 3 until you reach diminishing returns on your reading. In a matter of a few hours, you just might have a breakthrough!



Bundle Up

Create new market possibilities by putting things together or taking them apart.

Whether it's making bad news easier to accept, or just saving your customers a bit of time, bundling multiple things together can dramatically improve how we deliver information, products, and services. With this tactic, you'll be designing and building your own bundles in no time!

Before this card, consider running a  *Seeking Specifics* exercise. After, try taking apart existing vendor bundles with  *Vendor Disassembler*.

Bundle Up

1. Together, identify potential bundle ingredients by exhaustively listing the skills, capabilities, services or products you offer.
2. Use these bundle recipes to find the best combinations of ingredients:

Convenience Bundle: if you need X, you probably also need Y, so let's just put them together! This bundle saves time and effort by gathering everything in one place, for one price.

Power Bundle: ever had a sandwich? Then you already get how a combination of ingredients creates something far more valuable than each thing provided separately.

Payload Bundle: pair bad news with good, medicine with a treat, or a novel innovation no one wants yet with something tried and true; this bundle type makes potential downsides easier to accept.

Bloated Bundle: an expensive all-or-nothing assortment, with one or two things you need and a bunch of other stuff you don't. (If only there was a cheaper alternative without all the junk? Hmm!)

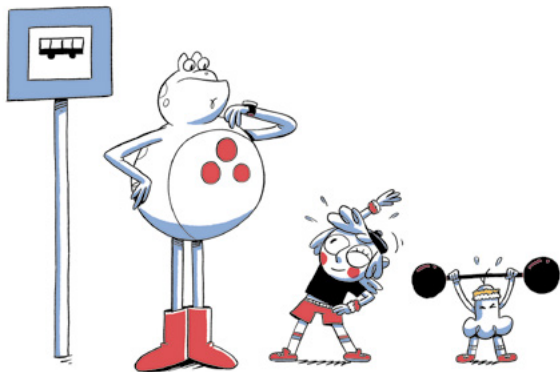
3. Decide how to best join the parts of each bundle together:

Gather: put all the parts in one place, with nothing else tying them together. Just a bucket of loose stuff (e.g., a gift basket or toolkit)

Connect: gather and loosely join the parts, making them easily swappable (e.g., an electric guitar and amplifier, connected only by an instrument cable).

Attach: tightly join the parts together, making them difficult to take apart. Think sewing, gluing or welding (e.g., a vacuum cleaner attached to a mobile robot is a robot vacuum cleaner!).


Blend: coalesce the parts together into a single, seamless thing. Impossible to disassemble (e.g., delivering two different kinds of medication in one pill).



Active Waiting

Do nothing, so you can conserve your energy for a more favorable moment.

Having complete control might make us feel better, but it takes enormous effort and can even have unintended consequences. What would happen if we instead allowed the natural course of things to do the heavy lifting? Sometimes it's best to just let things play out, saving our energy and stepping in only when the time is right.

Before this card, consider running a  **Default Disaster** to imagine the worst-case consequences. (Are they really that bad?)


Active Waiting

1. Ask yourself “What’s likely to happen by default in a week, if I/we don’t get involved?”. Write down a reasonable guess on a piece of paper. Then ask “Can I live with that?”.

If the answer is ‘no’...

- a. Make a list of the reasons why! These are your expectations, and in strategy expectations make you vulnerable.
- b. For each expectation, ask yourself “What would have to change on my end for me to let go of this expectation?”.
- c. Compare the cost of making those changes to the cost of getting involved.

If the answer is ‘yes’...

- a. Make a list of the signs you’d expect to see if you should get involved.
 - b. Make a second list, this time of signs you’d expect to see if staying out of it is paying off.
 - c. Make a plan to watch for both kinds of sign, to inform your future actions ( *Tripwires* can help).
2. Revisit and repeat the process as the situation unfolds, but instead of looking one week out, consider extending it to one month, one year, or even five years. Remain in this posture of active waiting until you see signs to get involved, or the situation takes care of itself.



Be First Or Be Fast

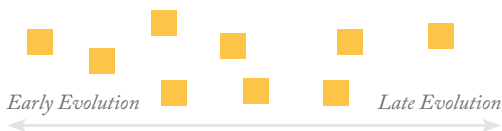
Know when to blaze a new trail and when to follow in others' footsteps, so you always have the advantage.

Being first can be great! It's also a lot of work, with no guarantee of a good outcome. So sometimes it's just best to let others take on that risk. Besides, perhaps we can be quick enough to follow in the footsteps of those who succeed! First mover or a fast follower... which way is best? This tactic helps you evaluate the market situation in order to make a clear-eyed decision.

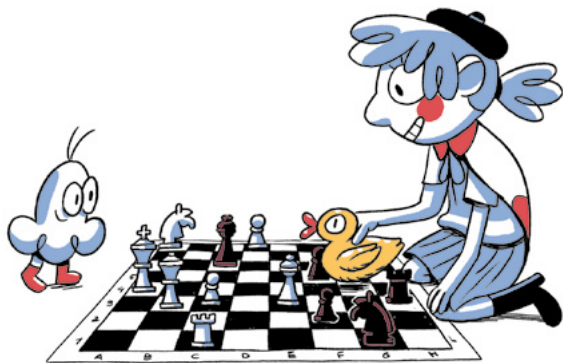
Before this card, consider running a  *Seeking Specifics* exercise or building a  *Wardley Map*.

Be First Or Be Fast

1. Together, identify one or more opportunities where you are deciding whether it's better to be the first mover or a fast follower. Write them down, one per sticky note
2. Draw the following spectrum of 🌀 **Market Evolution**, then work together to position the sticky notes from left to right, from Early Evolution (new, rare, poorly understood, but with great future potential) to Late Evolution (well-established, commonly available, well-understood, and driven by operational efficiency).




3. Read the below guidance together, then decide what to do.
 - a. In Early Evolution, First Movers play an expensive, high-stakes game. To improve their odds, they take advantage of new information, since they are the first to know it! Fast Followers, meanwhile, skip the high cost of discovery, instead just waiting for a First Mover to succeed, and then copying them. (🌸 **Active Waiting** is a Fast Follower's favorite trick.)
 - b. In Late Evolution, First Movers notice when there's little left to compete over but price. They kick off a race to the bottom, hoping to be the last one standing. Fast Followers are too late to realize that price is the final frontier, or too slow to be good enough, at a high enough volume, at a low enough price. They must make a quick exit and find new 🚩 **Feasible Futures**.
 - c. In the middle, it's common to see feature wars, where First Movers create a small advantage, then Fast Followers eliminate that advantage by copying it. Consider escaping that cycle by finding new options with 🌸 **Compete Different**.



Compete Different

Consider all available ways to compete so you can make the best investment of your limited resources.

Direct conflict is the most expensive way to compete, and it's often the first and only option people consider. However, there are many other, more cost-effective ways to get what you want. Pick the approach from this tactic that fits your situation best, vary your picks to keep opponents guessing, or use multiple approaches for maximum effect!

Use  ***Name Your Game*** to make sure your competitive actions line up with your short, mid and long-term intentions.

Compete Different

Gather your team to review the options below, then pick one or more to investigate further.

***** – Head-to-head competition

Pit your products and services against the competition's in a market showdown over profits, control, survival, etc. (Some assume this is the only option. It's not.)

***** – Indirect competition

Know your 🏗️ *Value Chain* inside and out. Keep each part working well and free from external interference. Know the competition's Value Chains better than they do. Find weak points so you can interfere, should you need to.

***** – Alliances

Cultivate your alliances by 🌉 *Building Bridges*. Call for their aid in Head-to-Head and Indirect Competition. Undermine or steal the competition's alliances (a 🗺️ *Human Network* from their point of view may help). Or, find shared interests and turn them into allies.

***** – Plans

Conceal your intentions. Uncover the competition's intentions and thwart them. (🕵️ *Open-Source Intelligence* may help, though beware of misleading signals!).

***** – Go elsewhere

Avoid the competition entirely by positioning differently, serving a different market, or doing something totally new. (A 🏠 *Feasible Futures* exercise may help).

***** – Do nothing



Sometimes the best move against the competition is no move at all. If the situation may resolve itself, give 🌸 *Active Waiting* a try.



Idea Garden

Share useful building blocks, then watch how people use them, so you can be among the first to benefit from any new innovations.

When you make a  **Building Block** available for public use, anyone in the market can potentially build novel, new things with it. Since you get the benefit of being able to watch how it's used and by whom, you can be the first to know when new things are taking off and swoop in with impeccable timing.

Before using this tactic, be sure to brush up on  **Building Blocks**. This tactic also pairs well with  **Active Waiting** and  **Open Approaches**.

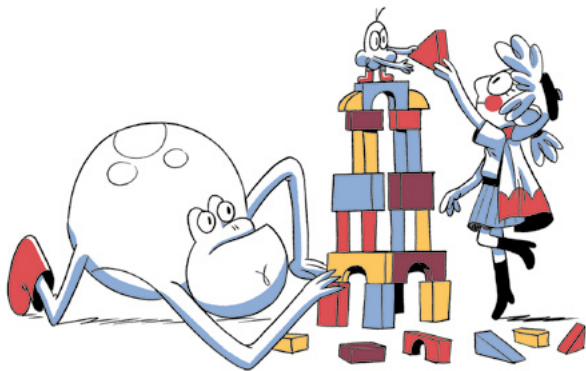
Idea Garden

1. Work together to identify an internal system that you use as one of your 🌀 **Building Blocks** when you create new things.
2. Run the following checklist, recording answers as you go:
 - ☐ Is there anyone out there who would want to use it?
 - ☐ Would we be able to commit to offering it to them?
 - ☐ Could we entice them to try it? ...and to stay, long term?
 - ☐ Do we know what kinds of data we would have to collect in order to spot new ways of using the building block?
 - ☐ Do we have confidence in our ability to be a fast follower if those new ways are valuable?
3. Read the following stories for inspiration, then work together to imagine the possibilities and make a plan:

“Here, take my project plans!” says a popular woodworking content creator, excited to see what new things viewers build as a result. The very best creations can also inspire new content.

“Save time and effort with our proprietary game development software!” a video games studio proposes, budgeting to acqui-hire indie creatives who use it to build successful new games.


“Use our research discovery system!” a pharmaceutical company offers academics in biomedicine, with a plan to watch for spikes in searches for promising new drug molecules.



Open Approaches

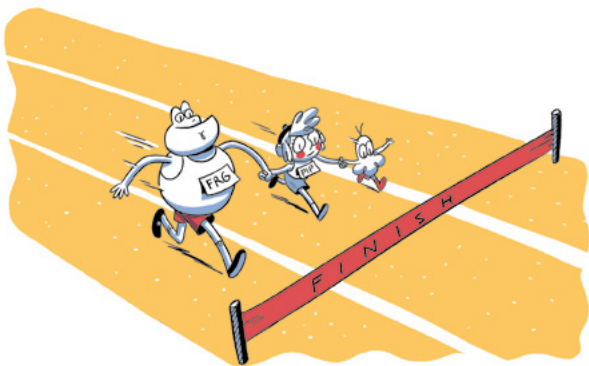
Give a product or idea away for free to speed up adoption, then invite people to give back to speed up improvement.

Freely sharing something useful can increase its adoption and encourage people to tinker and modify it for their specific needs. When we also make it easy for them to contribute their ideas back to the main effort, we create a win-win dynamic for everyone involved and speed up progress dramatically! Wikipedia (free knowledge), Ubuntu (a free operating system) and Project Gutenberg (free ebooks) are a few examples.

A  *Wardley Map* can help you perform a more robust analysis of an open play's impact.

Open Approaches


1. To find out if an open approach makes sense, decide what value to consider opening up. For example: *knowledge, designs, plans, processes, science, software, APIs, data, hardware, etc.* Doesn't matter what it is, as long as it's useful!
2. Discuss: "What do we hope to accomplish by opening up this thing of value?" For example, are you hoping to...
 - eliminate a competitor's advantage by offering a free DIY option with equivalent features?
 - collaborate and build alliances with other organizations?
 - help an ecosystem of related systems talk to each other?
 - use 'free' to build influence in a competitor's supply chain?
 - attract contributors and recruit them to your talent pool?
 - just feel warm and fuzzy for doing a nice thing?
3. Together, determine whether you can follow through on an open approach using this checklist. Can you...
 - ☐ share it publicly, for free? (That's what enables rapid adoption!)
 - ☐ live with people making modifications? (Tinkering is one of the main benefits of adoption!)
 - ☐ manage a process that welcomes external contribution? (That's what accelerates improvement!)
 - ☐ make good decisions about licensing with support from legal counsel? (Get this wrong, and you'll regret it!)
 - ☐ be a good steward? (Open requires a willingness to lead, say 'no', and prioritise the effort's long-term health over short-term wants)
 - ☐ commit to serving a community? (Relationships between the users and stewards must be cultivated with care over a long time to enable a virtuous cycle of sharing, contribution, and improvement.)



Building Bridges

Invest in your alliances, so you'll always have a helping hand when you need it most.

Ruthless competition is destructive, wasteful and sometimes necessary. However, we can often achieve our goals at a lower cost by learning to collaborate with other players. Building these relationships is no simple task, but the resulting alliances can open the door to far greater rewards.

Explore the  **Human Network** to find relevant relationships to develop, both inside and out.

Building Bridges

Allies don't appear out of nowhere. Like any other friendship, they take time and shared experiences to build.

1. Start by picking a rally point. It can be a technology, a process, a methodology or any other kind of common ground you have with other players.
2. Identify the nearby players. List out all the companies, influential figures and everyday folks who use or make things related to the rally point.

Tip: if you don't know who to add to your list, try attending events, reading blog posts and exploring social media related to your rally point. See who's talking and listening!

3. Decide which players are good candidates by categorizing each as one of the following:
 - a. Friendlies – relationships to deepen
 - b. Neutrals – new relationships to explore
 - c. Enemies – relationships to ignore or win over
4. Start building new relationships with a light touch. Deepen them gradually over time by making and following through on commitments of greater and greater importance:
 - a. Easy (weeks): what would have to happen for you to regularly show up in the same places and get acquainted?
 - b. Hard (months): what would have to happen for you to work on a small project together, for mutual benefit?
 - c. Hardest (years): what would have to happen for you to commit to building something important together?


Tip: having alliances makes you more formidable than a solo adversary. Invest well to create safety in numbers and accelerate progress in mutually beneficial areas of interest.



Positive Influence

Educate the people who matter to you, so they make better decisions for themselves (and for you).

Education isn't just learning; it's also influence. Clue your users, customers, stakeholders and other beneficiaries into the everyday details of how things work. Make them smarter; help them see what you see, and watch how their decisions change! (Use responsibly!)

Before this card, consider running the  **Human Network** tactic to identify potential audiences for your education efforts.

Positive Influence

1. Work together to identify an important user, customer or other stakeholder to invest in educating. Be sure to pick a person or group whose long term wellbeing matters to you.
2. Decide on a topic to educate them about. Pick something that will be obviously beneficial and empowering for them know. Ideally, that knowledge should have a secondary benefit that is also useful to you.

Audience: job seekers. Topic: how to negotiate your salary. Primary effect: helping them get higher pay! Secondary effect: higher pay expectations from workers, which we can meet but our competitors can't.

3. Work together to evaluate the topic you selected to see where it fits along the stages of 🌀 **Market Evolution** below:



4. Make a plan to educate your chosen audience with the corresponding stage number in mind:

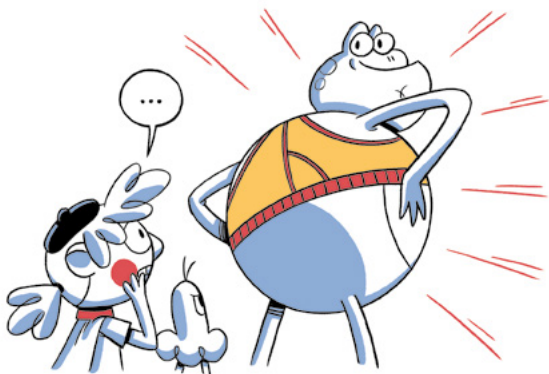
Stage 1: it's a brand new discovery, so focus education on describing what the thing is, why it's full of wonder, and what it could lead to!

Stage 2: raise awareness by helping people understand how it works, why it's an advantage, or how to make one.

Stage 3: it's common enough that education can focus on daily operations, maintenance, and comparing features and alternatives.

Stage 4: since we take it for granted, highlight how much we rely on it, what it makes possible, and what we can build on top of it!

*Tip: if you need to help your audience prepare for an incoming change, follow this up with 🦋 **Embrace The Change**, from their perspective!*




Backbrief

Rehearse the plan before work begins, so you eliminate unpleasant surprises early.

Like any other team skill, coordinated action takes practice. A backbrief gives everyone the chance to rehearse their part in the plan and walk through what they intend to do. As team members share their intentions, the gaps and weaknesses in the plan become clear, enabling early correction while the stakes are low.

Backbrief

1. Before kicking off a complex initiative, write down a clear  **Challenge Statement** and share it with key team members. Include what must be done, why it matters, and any context or guidance that will make it easy for them to do the right thing.
2. Give the same team members a few days to each draft a one-page Intent Statement in response, addressing the following:

1. Actions ➔ **2. Rationale** ➔ **3. Requests**

As of now, what do you intend to do to meet the Challenge?

"First, I intend to... and then I will..."

How and why will those actions address the Challenge?

"This will address the challenge because..."

What support will you need (especially from peers)?

"I'm going to need help with..."

3. Gather the team and ask each person to read their Intent Statement out loud. After each statement, ask its author to take notes while the group discusses the following:
 - a. In what ways did the statement match your expectations?
 - b. In what ways was it surprising or unexpected?
4. Revise your Challenge Statement on your own to minimize the chance of unwelcome surprises as team members coordinate their actions. Consider including:
 - boundaries or additional context to help them stay on target,
 - permissions, freedoms, or inspiration to encourage and embolden them,
 - callouts to known challenges or areas of conflict.
5. Re-issue your revised Challenge Statement, invite team members to revise their Intent Statements (their notes from the discussion will be useful here), then repeat from Step 3. The goal isn't perfect alignment. 'Good enough' will do!



Take Responsibility

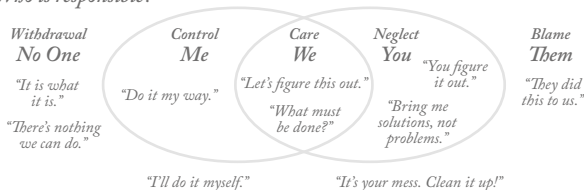
Hold the space for doing what must be done, in order to lead the people in your care through difficult, no-win situations.

When bad things happen, it's easy for leaders to swing wildly between neglect ("it's your responsibility") and control ("it's my responsibility"). But neither is a safe default. This tactic introduces an alternative approach ("it's our responsibility") that treats all involved with dignity and focuses on what must be done, together.

"Our task is to make trouble, to stir up potent response to devastating events, as well as to settle troubled waters and rebuild quiet places." – Donna J. Haraway

Take Responsibility

Who is responsible?



1. You may be in a difficult situation, but if it's safe to do so, bring everything to a stop. Explain to your team that getting stuck in 'quick reaction' mode only makes things worse, and that you must all switch from 'doing' to 'thinking' to see your way through the mess.
2. Thinking clearly under pressure is hard, so next work together to reduce how much pressure everyone is feeling:
 - a. Find out how long you have before the situation turns into a full-blown catastrophe. Minutes? Days? Months?
 - b. Identify available workarounds, temporary measures or quick fixes to use if needed.
 - c. Communicate with anyone experiencing negative consequences. Reassure them, and set their expectations.
3. Now struggle through it, together. Focus on care (persistent attention to doing what must be done) while avoiding the temptation of withdrawal, control, neglect or blame.

Here are some guiding questions:

- What must be done?
 - How can we reduce harm?
 - How can we make things right?
4. Decide what to do and do it. Which options can we live with?

Tip: remember: "We are responsible. We must stay with the trouble until it's done."



Decision Diary

Improve your decision-making skills by comparing what you think will happen to what actually happens.

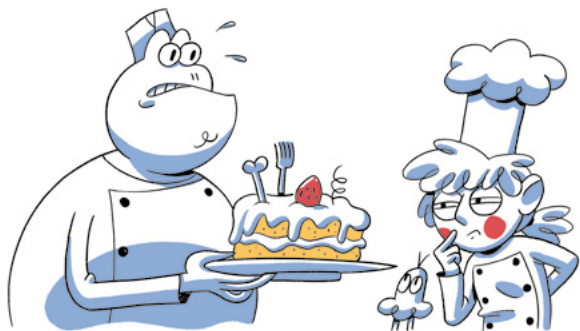
The secret to better decision-making is to deliberately give yourself the chance to learn from your mistakes. In that spirit, this tactic invites you to write down your predictions before taking action and then reflect on what you got right or wrong afterwards. Every decision is a learning opportunity; don't let these free lessons pass you by!

Consider using a  **Measure Twice** to learn as much as you can before incurring the consequences of action.

Decision Diary

Every time you make a big decision, add a record in a document or journal, one per page. Every record you write represents a lesson you've deliberately learned over the course of your career.



1. In the first paragraph of the record, describe the decision you are making, in the form of a plan:
 - a. What do you intend to do? (Are there alternatives?)
 - b. Why do you intend to do it? What's your rationale?
 - c. What steps will you take to carry it out?
2. In the second paragraph, make a prediction:
 - a. What consequences do you expect to see as a result?
 - b. When will you be able to see the consequences?
 - c. When you ask whether the prediction came true, will you be able to answer with a clear Yes or No? (Revise if No.)
3. Carry out your plan, but keep watch for the consequences.
4. When the consequences arrive, revisit your diary. Add a third paragraph to the record, and write down a reflection:
 - a. What did you think would happen?
 - b. What actually happened?
 - c. Were you correct? (Yes or No!)
5. Lastly, decide what to learn from the experience. Add a fourth paragraph:
 - a. What did you get right? What did you get wrong?
 - b. Could you have known? If so, how?
 - c. What will you do differently in future decisions?



Measure Twice

Catch missed opportunities and mistakes early by sharing your thinking with a group for feedback.

Unchallenged ideas are like half-baked cakes; they really could have been delicious, if only they had felt the heat a little longer! This tactic subjects your ideas to scrutiny from different points of view, catching problems early, and giving you the chance to adjust before taking action.

Make a  **Wardley Map** to get clear on your situation, problems and proposed actions. Follow this tactic up with  **Decision Diary** to create a learning moment to improve your decision-making.

Measure Twice

1. Gather a small, diverse group of advisor-critics. Ensure the group represents a healthy mix of different backgrounds, skills, levels of experience, etc.
2. Present your ideas to the group for challenge. Ask them to take notes, especially of any points they disagree with or find unclear. Keep it short (under 10 minutes) as you make your case. It may help to use these questions to structure your ideas:
 - a. What's happening in the situation we are in?
 - b. What problems in the situation should we address?
 - c. What actions should we take to address those problems?
3. Ask each person to present their notes and observations to the rest of the group. Encourage discussion, but don't participate in it. Your job is to listen carefully and take your own notes, capturing every question, observation and point of confusion mentioned.
4. Close out the meeting by presenting your own notes. Do not editorialize or comment. Just prove that you were listening!
5. Privately review the feedback. For each item in your notes, decide how to act on it:
 - ...change how you present the idea?
 - ...change the idea itself?
 - ...change nothing?

Tip: repeat this tactic with the same group of advisor-critics to deepen the feedback, or with a different group to broaden it!




Give Me A Reason

Speak like a leader so that everyone stays connected to the purpose.

While you can start with why, that's not where you should finish. What do people need to believe in order for that 'why' to make sense? Help them see the world through your point of view, and then encourage them to make their own choices. Create a constant sense of purpose. Say it again and again until it's alive in everyone's work.

Don't have a big why yet? Try  **Plainly Put** beforehand. Follow up with  **Better Now** to start moving from purpose to action.

Give Me A Reason


1. On your own, draft a short but compelling speech that covers the following sections and can be delivered (or read) in just a few minutes:
 - a. Sum it up:
 - What is the situation we're in?
 - What's good about it?
 - What's bad about it?
 - How did we get here?
 - b. Describe the best possible future:
 - What vision of the world are we fighting for?
 - Why is that world right? (Why is it compelling?)
 - Double down: why is it morally outrageous that this world isn't already here?
 - c. Describe the worst possible future:
 - What vision of the world are we fighting against?
 - Why is that world wrong?
 - Double down: why is it morally outrageous that this world might come to be?
 - d. Make your call to action:
 - What are we going to do about it?
 - How can people contribute today?
2. Test your speech by delivering it to a trusted group. Follow it up with  **Measure Twice** to improve your message and delivery. Keep refining and testing until people consistently get it.
3. Say it again, say it again, say it again. Get comfortable repeating your message over and over until everyone can't help but know it as well as you do.



Challenge Statement

Eliminate miscommunication by crafting a crystal clear objective.

People are not robots; they do not take orders. Instead, they make the best choices they can with whatever information they have. Your job then is not to issue instructions, but to make the challenge clear. Use this tactic to craft the objective and test it for clarity, so you can be sure it will be heard and understood.

Once you're sure that what you say is what they hear, use a  **Backbrief** to confirm that it will translate into what they do.

Challenge Statement

1. Write the first draft of your Challenge Statement, following this outline:

- a. What outcome could we achieve if we tried?
- b. Why does it matter, and what does it mean?
- c. What sort of actions are explicitly off limits?
- d. What sort of actions are explicitly encouraged?
- e. What will it look like if we succeed?

Revise until it's brief, simple and clear.

2. Gather a test audience and deliver your Challenge Statement to them. Speak boldly. Do not stop for questions.
3. When you're done, ask each person to write down what they heard, restating it in their own words. (Offer plenty of time. Make sure they know that they are testing you, not the other way around.)
4. As each person finishes, invite them to read their restatement to you privately, in the same bold, brief fashion. Do not interrupt them (it's only fair)! Listen carefully, take notes and then say 'Thank you'.
5. On your own, compare what you said to what everyone heard, then revise the Challenge Statement based on what you find:
 - a. Which ideas rang through, clear as a bell? (Keep these!)
 - b. Which ideas got lost, confused or distorted? (Rewrite these, or drop them from the message!)
6. Repeat this tactic until the Challenge Statement is clear. (Use the same test audience to demonstrate that you listened, or use a different audience for a fresh perspective.)



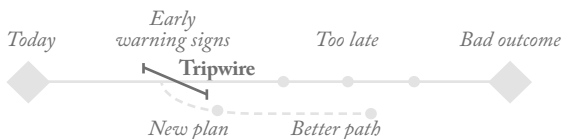
Tripwires

Set up an early warning system to find out when change is on its way so you can buy time to make a plan.

Following conventional advice, we should plan ahead whenever we can. After all, proactive is better than reactive, right? But what if the possibilities to plan for are endless? Should we really spend all our time on 'what ifs' at the expense of getting anything done? This tactic strikes a better balance by making it safe to delay planning efforts until there are tell-tale signs of change on the horizon.

Consider running a  **Default Disaster** first to better imagine the kinds of worrisome outcomes this tactic is built to address.

Tripwires



1. Get your team together around a workspace. Have one person write, while the rest of the group discusses the questions below:
 - a. Describe a future possibility that is worrisome. What happens, and to whom? Why is it a big deal?
 - b. What happens just before the outcome becomes inevitable? And what happens before that? And before that? Keep writing to build out the situation, going backwards in time.
 - c. Finally, how does it all start? What early warning signs could you see, long before things start to go wrong?

Tip: read everything you've written, in the reverse order that you wrote it, to make sure it makes sense!

2. Use the template below to create a series of tripwires, and record them in the notes:

We will check for [early warning sign] every [frequency]. If the sign is there, we will start planning for the possibility of [worrisome outcome] happening.

3. Monitor your tripwires by following the plan you described in the template. From the moment you're alerted by a tripwire, make the most of the opportunity to change the direction away from a bad outcome. (✳️ **Take Responsibility** can help.)
4. Repeat this tactic multiple times to create a network of tripwires that covers all major worries.

About the authors

David Holl is a strategist and transition designer focused on the long term. He works to make strategy accessible to leaders at every level, so they can shape better futures for their organizations and for the world.



David would like to thank his spouse, their cat Laszlo, and you – the reader.



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Simon Wardley invented Wardley Mapping (licensed CC BY-SA 4.0*) to demystify and democratize strategy. (Thank you, Simon, for your steadfast kindness and encouragement over the years. We hope this adds a small dent to your already-huge impact.) Read his book at medium.com/wardleymaps.

Joshua Bloom (or 'Jabe', as we know him) created Ideal Present Design, which makes big change for better futures accessible to us today. (The world needs to learn your ways of noticing the present, Jabe. Thank you for being an incredible mentor and an even better friend.) Follow him at jabe.co.



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