

# PART

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## TOOLS

### INTRODUCTION

In this final section, I will provide you with additional tools and resources that will help support and supplement the creative strategic process that I've laid out throughout this book. These tools will be presented in three parts:

1. **Quick Reference Guide.** This is a quick summary of each of the seven steps of the process, with an overview of the key tools that have been provided to support each step.
2. **Strategic Presentation Guideline.** Here I provide a guideline for preparing the strategic presentation that was discussed during the Arrangement step. This is a 12-“slide” outline that you can use to help prepare your own presentation following the strategic storytelling arc.
3. **Tidbits of Wisdom.** These are specific quotes from each chapter that should serve as a quick reminder of some of the key messages from the book.

I also encourage you to visit the website <http://composingstrategy.com> for more tools, templates, and examples, as well as information on how to contact me if you want to learn, share, or discover more about this wonderful art of creative strategy generation!

Thank you for reading, and enjoy your strategic journey!

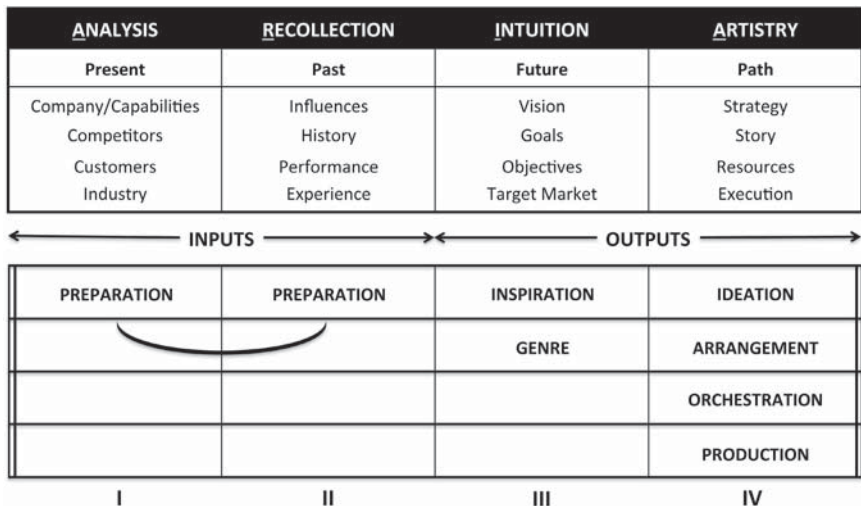
# APPENDIX

## QUICK REFERENCE GUIDE

What follows is a summary of the Creative Strategy Generation process that is outlined in this book. This can be used as a quick reference guide for how to build your strategy from preparation through production, following the model shown in Figure A.1.

**FIGURE A.1**

Creative Strategy Generation Model



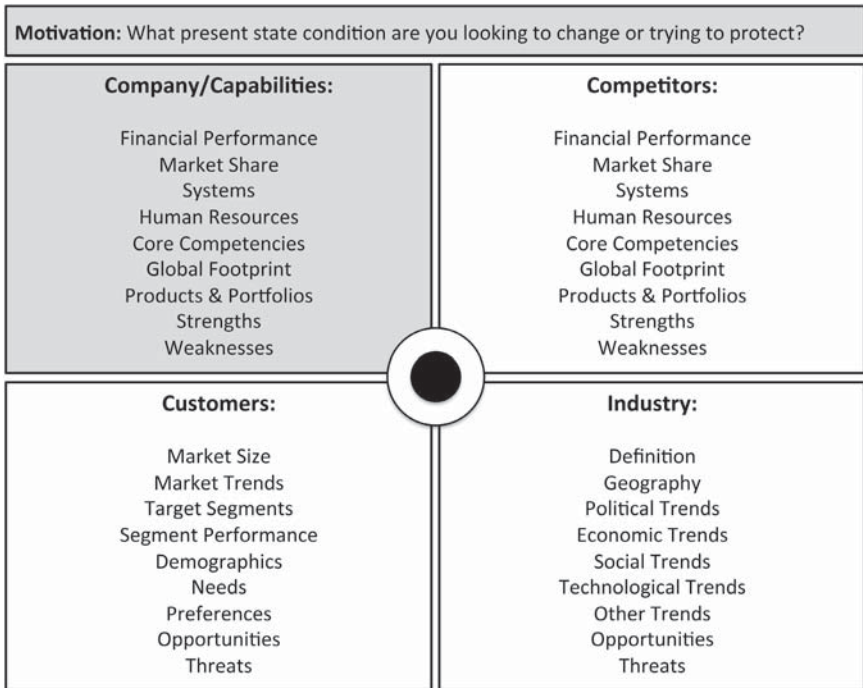
## PREPARATION

### Step 1: Completing Your Baseline Analysis

Complete your baseline analysis (see Figure A.2) with an eye toward the past, present, and future. Capture as much information as you can around the internal factors (company/capabilities) and the external factors (competitors, customer, industry) that will affect your overall plan. Also be sure to capture the motivation for your strategy, which you will later translate into your vision, goals, and objectives.

**FIGURE A.2**

Baseline Analysis



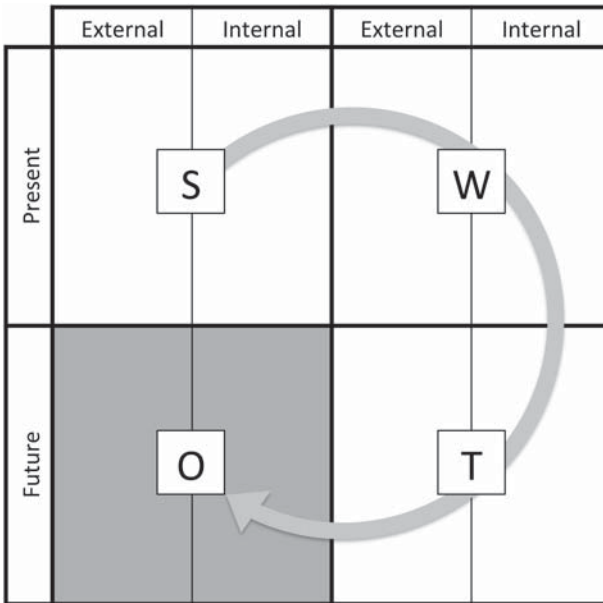
## INSPIRATION

### Step 2a: Performing Your SWOT Analysis

Using the information from your baseline analysis, complete a SWOT analysis (see Figure A.3), being sure to end with the opportunities, which are what your strategies will ultimately be designed to address. You should think of your SWOT analysis in terms of both internal and external factors, so that it will correlate closely with your baseline analysis. Additionally, you should focus your strengths and weaknesses analysis on the present day, while looking toward the future for opportunities and threats. This will ensure a smoother bridge from your baseline analysis to your strategic plan.

**FIGURE A.3**

SWOT Analysis



## Step 2b: Developing Your Vision, Goals, and Objectives

Starting with the motivation for your strategy that you identified through your baseline analysis, and using the insights that you gained through your SWOT analysis, establish the vision, goals, and objectives for your strategy (see Figure A.4). Be sure to create an inspired vision that is focused on both the needs of your company as well as the needs of your customers. You will use your vision, goals, and objectives to filter the opportunities from your SWOT analysis and decide on which ones you ultimately want to pursue in your strategy.

**FIGURE A.4**

Vision-Goals-Objectives Pyramid




## GENRE

### Step 3: Understanding Your Target Market

Using your filtered market opportunities, carefully choose and understand the markets you will pursue in your strategy, and capture the needs of those markets by creating a Team Card for each (see Figure A.5). This will help to keep you focused on the needs of your customers as you begin to develop your strategy. Be sure to run any new insights you uncover during this step back through your SWOT analysis, reframing your vision, goals, and objectives if necessary.

**FIGURE A.5**

Team Card

<p><b>Team Name</b></p> <div style="border: 1px solid gray; border-radius: 50%; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;"> <p><b>Team Logo</b></p> </div>	<p><b>Team Data:</b></p> 
<p><b>Team Drivers:</b></p>	
<p><b>Team Issues:</b></p>	
<p><b>Team Needs:</b></p>	

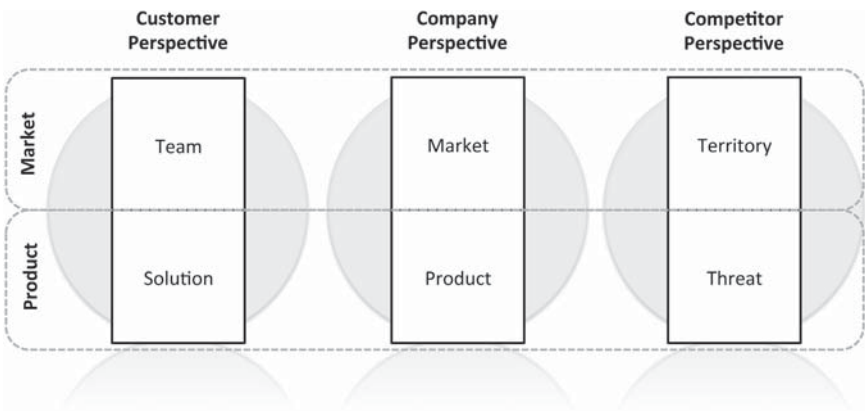
## IDEATION

### Step 4a: Composing Your Strategic Melodies

Using your filtered market and product opportunities as a guide, develop your high-level strategic melodies by focusing through three strategic perspectives: customer, company, and competitor (see Figure A.6). This will provide a methodology to bridge from the *what* of your vision, goals, and objectives, to the *how* of your strategies. More specifically, your strategic melodies will address how you intend to pursue the market and product opportunities that you have chosen.

**FIGURE A.6**

Strategic Perspectives



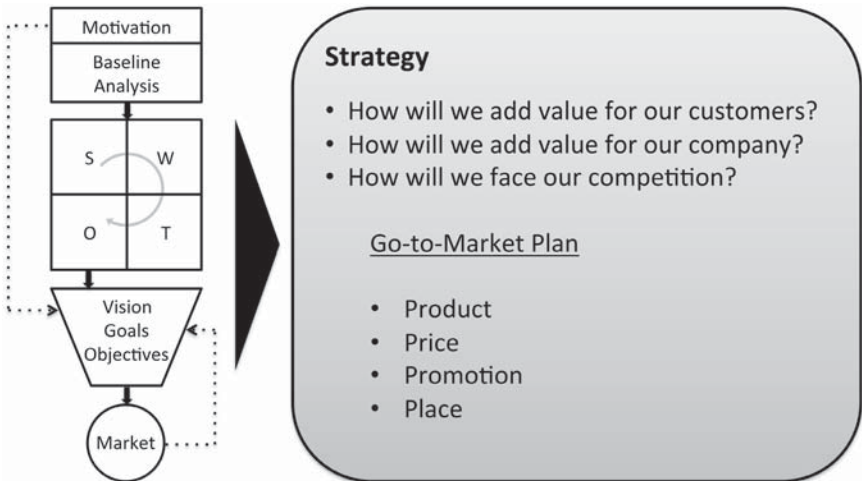


## Step 4b: Creating Your Go-to-Market Plan

Once you have composed your overarching strategies, you can develop your Go-to-Market Plan, providing high-level strategic guidance for each of the four marketing mix elements of product, price, promotion, and place (see Figure A.7). This plan will serve to guide your strategic actions during the implementation stage of your strategy.

**FIGURE A.7**

Composing Your Strategies and Go-to-Market Plan



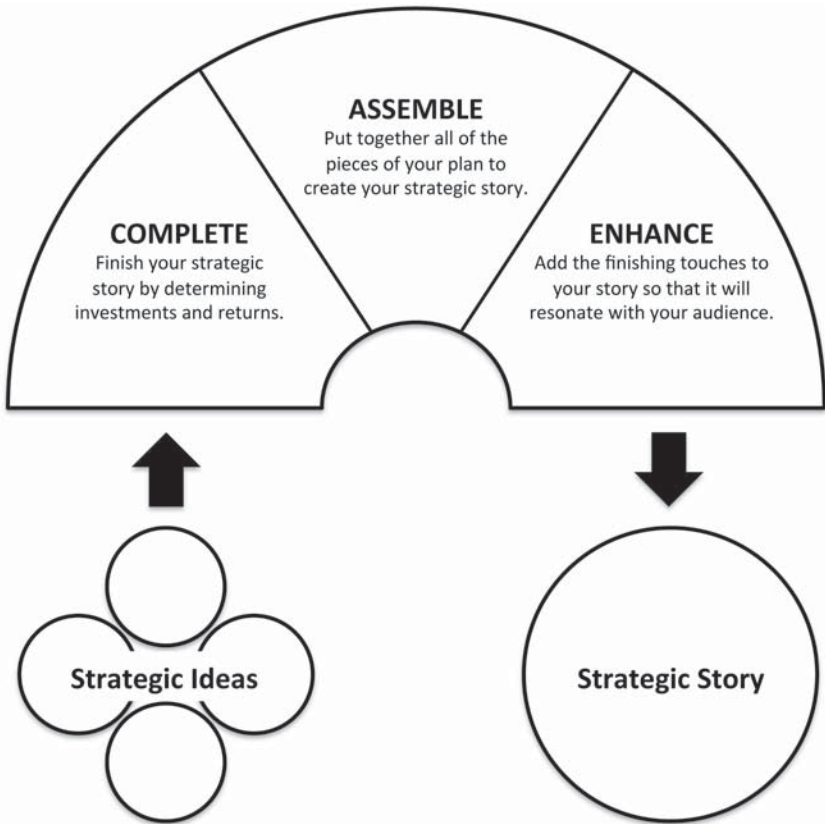
## ARRANGEMENT

### Step 5: Developing Your Strategic Story

Next, you will want to put your strategy in a form that can be easily communicated and understood. You will do this by completing your story, assembling all of your story elements, and enhancing your story with the right level of tone, energy, and harmony to successfully drive the implementation (see Figure A.8).

**FIGURE A.8**

Strategic Arrangement



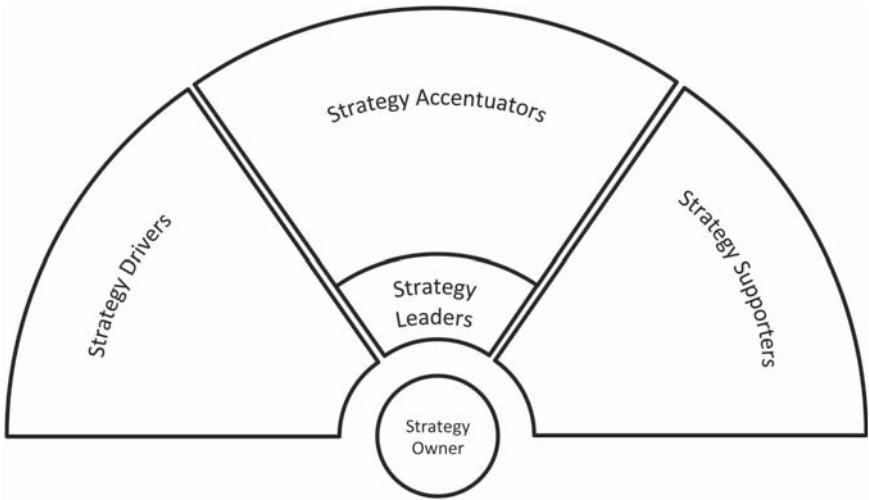
## ORCHESTRATION

### Step 6a: Laying Out Your Orchestra

In order to get your strategy ready for implementation, it will be important to identify and guide the resources that will be needed to carry out your plan. You will do this by assigning each implementation function to one of four roles—leader, driver, supporter, or accentuator—and then mapping these functions visually so that their relative roles can be easily identified (see Figure A.9).

**FIGURE A.9**

Strategic Orchestra Map



### Step 6b: Creating Your Strategic Score

Once you have identified functional roles and responsibilities, you will then be tasking those teams with helping to develop and carry out actions that align with your Go-to-Market Plan. The key actions can be captured on a strategic score (see Figure A.10), which will continually help to guide your strategy throughout the implementation stage.

**FIGURE A.10**

The Strategic Score

		YEAR 1	YEAR 2	YEAR 3
<b>Product</b>	Product			
	Engineering		Actions	
	Operations			
	Service			
<b>Price</b>	Product			
	Marketing		Actions	
	Sales			
	Support			
<b>Promotion</b>	Product			
	Marketing		Actions	
	Sales			
	Support			
<b>Place</b>	Product			
	Marketing		Actions	
	Sales			
	Support			

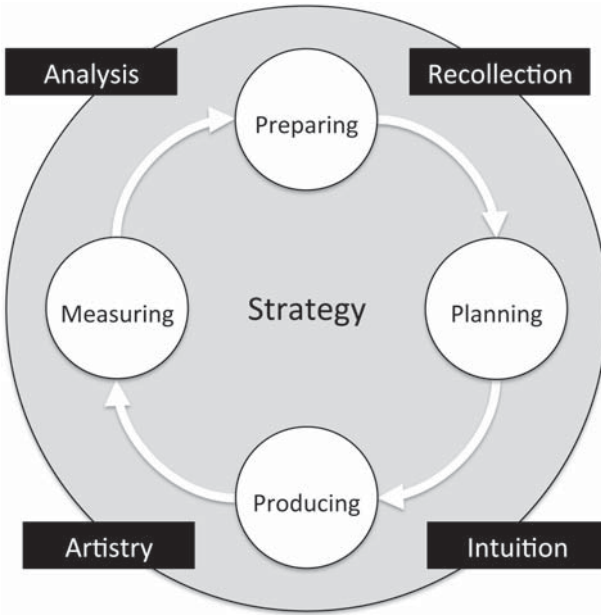
## PRODUCTION

### Step 7: Implementing Your Strategy and Measuring Results

Your strategic implementation will have a life cycle, much like the life cycle of your product itself. As such, it will be necessary to treat your strategy as an ever-evolving entity that will be dynamically modified as the implementation progresses. This life cycle will consist of the four high-level activities of preparing, planning, producing, and measuring, dynamically supported by your four proficiencies of Analysis, Recollection, Intuition, and Artistry (see Figure A.11). And so, the process comes full circle, both literally and figuratively.

**FIGURE A.11**

The Strategic Life Cycle



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# APPENDIX B

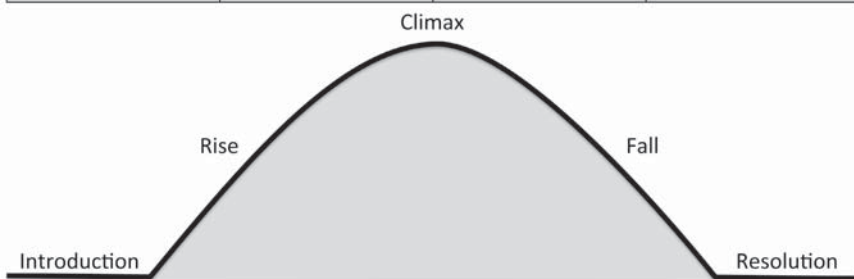
## THE STRATEGIC PRESENTATION

Your strategic presentation can take any form you like, as long as it follows the strategic arc that we discussed in Chapter 6 and as shown in Figure B.1.

**FIGURE B.1**

The Strategic Arc

ANALYSIS	RECOLLECTION	INTUITION	ARTISTRY
Present	Past	Future	Path
Company/Capabilities	Influences	Vision	Strategy
Competitors	History	Goals	Story
Customers	Performance	Objectives	Resources
Industry	Experience	Target Market	Execution



The following guide gives a general idea of how your strategic presentation should flow. Although I am presenting this guide in the form of specific “slides,” I encourage you to use these as an outline rather than a template. For example, you may want to expand upon some of the slides that I am suggesting, or you may choose to eliminate some slides altogether. You might also consider telling your story using a completely different medium and forgoing the use of any slides at all. Similarly, you should experiment with the order and flow of your presentation so your story is told in a way that reflects your particular situation.

Against that backdrop, here are three tips that I encourage you to follow no matter which type of presentation you choose:

1. Make your presentation highly visual, striking just the right balance between images and words. Your slides, if you choose to use them at all, should serve to illustrate your story, not tell it word for word.
2. Present your information at an uncomfortably high level. In reality, you will need to show a relatively small amount of data to support your strategic story.
3. Do not begin your story with the ending. There is no place for an executive summary in your strategic presentation. Save your required investments and projected financial results for the end of your story.

What follows are the guidelines for your strategic presentation.



## Product/Portfolio Snapshot

- Introduce Your Product/Portfolio

### HINTS

- Don't assume that your audience knows your products.
- Show your audience not only what your products are, but also how they are used.
- Use visuals to illustrate key points.
- Introduce your positioning and value proposition.
- Don't spend too much time explaining every detail of your product!

## Current Financial Picture

- Past and Present Financial Performance
  - Revenue
  - Profitability
  - Market Share

### HINTS

- Talk about how your performance compares to overall company expectations.
- Indicate performance by region (if applicable).
- Be sure to define the market that your share applies to.
- You should be able to explain any significant trends.
- Show only the information that will be relevant to your story—don't overdo it!

## Customers

- Target Market Segment(s)
- Market Forecast(s)
- User Profiles
- Customer Needs
- Market Opportunities
- Market Threats

### HINTS

- Summarize customer needs at a high level and in terms that people can relate to.
- Include applicable geographic, demographic, and market size data.
- If you use user stories or personas in your presentation, be sure to show how these individual viewpoints represent entire segments.
- Be sure to cite any data sources you may have used to determine market forecasts.

## Industry

- Industry Trends
  - Political
  - Economic
  - Social
  - Technological
- Industry Opportunities
- Industry Threats

### HINTS

- Utilize your PEST analysis.
- Remember to talk to both where the industry is now and where you think it is going in the future.
- Talk about how industry trends might affect customer needs.
- Introduce industry opportunities and threats at a high level.

## Competition

- Competitive Landscape
- Competitor Market Shares
- Competitor Strengths
- Competitor Weaknesses

### HINTS

- Remember to address both where the competition is now and where you think it is going in the future.
- Provide a snapshot of competitor market share trends.
- Talk about how current competitive trends might affect customer needs.
- Think about how competitive strengths and weaknesses compare to your own.

## Company Analysis

- Company Strengths
- Company Weaknesses
- Product Strengths
- Product Weaknesses
- Comparison to Competitive Strengths and Weaknesses

### HINTS

- Analyze your systems, processes, human resources, and organizational capabilities.
- Share any relevant company/product history that may be applicable to your story.
- Try to view your company through the eyes of your customers.
- Remember to compare your strengths and weaknesses to your competitors.
- BE HONEST in your assessment.

## Vision / Goals / Objectives

- Company Vision
- Product Vision
- Strategic Goals
- Strategic Objectives

### HINTS

- Be sure that your product vision aligns with your company vision.
- Think about how your product vision aligns to whatever is motivating your strategy.
- You will use your vision, goals, and objectives to help filter your strategic opportunities.
- Try not to reveal your strategies just yet. This is the what, not the how.

## Strategy

- Target Market
- Strategies (Should answer the following questions)
  - How will we add value for our customers?
  - How will we add value for our company?
  - How will we face our competition?

### HINTS

- Tell your audience about the market you will be targeting and why.
- Remind us of the customer issues that your strategies will address.
- Your strategies should be derived from your market and product opportunities.
- Your strategies should address *how* you intend to achieve your vision, goals, and objectives.

## Go-to-Market Plan

- Product Strategy
- Price Strategy
- Promotion Strategy
- Place Strategy

### HINTS

- Do not to get too detailed here; providing an overall direction for each P should suffice.
- Try to anticipate the reactions of competitors and customers to each of your market actions.
- Feel free to use a different marketing mix model if it better suits your plan.

## Investment & Resources

- Required Resources
  - Human Resources
  - Equipment & Systems
  - Promotional Expenses
- Required Investments
  - Capital Expenditures
  - Ongoing Expenses

### HINTS

- Challenge yourself to think about if your company is truly equipped to execute the strategy and, if not, what additional investments will be required.
- This is a high-level estimate; don't be afraid to make assumptions and state what those assumptions are.
- This is not a business case. Do not get too detailed in this presentation.

## Results

- Long-Term Financial Results
  - Revenue
  - Profitability
  - Ongoing Expenses / Depreciation
- Long-Term Market Share Results
- Customer Benefit

### HINTS

- Think in terms of a three- to five-year horizon.
- Be sure to tie your results back to your strategic objectives.
- Remember to break your revenue growth into price, share, and market components.
- State any assumptions on pricing or costs that will affect your margins over time.

## Summary

- Restate the Strategy
- Restate the Expected Results
  - Customer Benefit
  - Company Benefit
  - Competitor Reaction
- Ask for the Order!

### HINTS

- Summarize at the end of your presentation, NOT at the beginning.
- Restate your story in just a few sentences, preferably with a visual that will leave a lasting impression on your audience.
- Your audience should leave feeling EXCITED about your strategic plan!
- If there is something you need, don't forget to ask for it!

# APPENDIX

## TIDBITS OF WISDOM

### **Introduction**

“I cannot teach you how to be creative. What I can do is teach you how to tap into the creativity that you are innately born with but perhaps didn’t know you had.”

### **Chapter 1: ARIA**

“The key to being an artist is that you have to care enough about something to want to express it, and then you have to translate what you care about in a way that people want to experience it.”

### **Chapter 2: Preparation**

“A truly great leader will tell his or her troops not only *what* they are fighting for but also *why* they are fighting.”

### **Chapter 3: Inspiration**

“You can only change the world if you are willing to change your own world with it.”

**Chapter 4: Genre**

“Few companies want to view themselves as putting their own needs above the needs of their customers, even though this in reality may be exactly the situation they are in.”

**Chapter 5: Ideation**

“Your strategy should provide the context for your actions.”

**Chapter 6: Arrangement**

“Your deep knowledge of any topic can most effectively be demonstrated through your ability to break down that knowledge in a way that everyone can easily understand and absorb.”

**Chapter 7: Orchestration**

“Collaboration isn’t always easy, but it is almost always more rewarding than doing something by yourself—as long as you seek to truly understand the people you’re collaborating with.”

**Chapter 8: Production**

“One concept builds from another. One thought serves as the foundation for the next. This is as it is in business, just as it is in music, just as it is in life.”

**Chapter 9: Coda**

“The very best business strategies are indeed creative works of art.”



# NOTES

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# RESOURCES

The following books are all a part of my personal library. Some were used as points of reference for *Creative Strategy Generation*, while others have served as sources of inspiration and influence for my own practices, processes, and creativity over the years.

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