

*Any fool can run toward the light.  
It takes a master with courage to  
turn and face the darkness and  
shine his own light there.*

*- Leslie Fieger*

"Strategy is not about  
adding more and more  
stuff.

Strategy is about taking  
stuff away.

Taking away everything,  
until there's only one  
thing left.

**One single powerful  
thought."**

– Dave Trott



## What is this?

To me, writing a strategy isn't a paint by the numbers kind of thing.

There are end deliverables, and there are fundamentals that help you get there but it's more exploration than anything.

This is a collection of fundamentals + thought starters + inspiration...

## How should I use it?

READ FRONT TO BACK

///

SKIP TO RELEVANT SECTION

///

OPEN RANDOMLY

⋮

OR USE AS HARD  
SURFACE FOR WRITING  
NOTES IN THE REAL WORLD

Whatever gets you there.

PACK A BAG, WE'RE  
GOING ON A TANGENT.



### **What we do**

1. Our job is to find the real problem and outline a "way-in" to solve it
2. Our method is to uncover hidden truths about real people and their lives that can be used as levers to success
3. Our obligation is to smash the corporate filter
4. Our motivation should be to create more power than the initial set of ingredients would suggest

### **The rules**

1. You can't understand something you've never experienced (get the fuck out of the office)
2. Assume nothing
3. Compromise only waters things down
4. Be aware of what's possible to change and what's not without losing what makes it work
5. Everybody will interpret a direction differently. Be clear about what is up to interpretation and what isn't
6. Think about what. Don't let how get in the way
7. Stretch the possible
8. Live off the land
9. Break shit

### **Dangers**

1. Only focusing on feedback in front of you
2. Too many hands on the wheel
3. Monotony
4. Rules and expectations



Defining the problem.....	<b>11</b>
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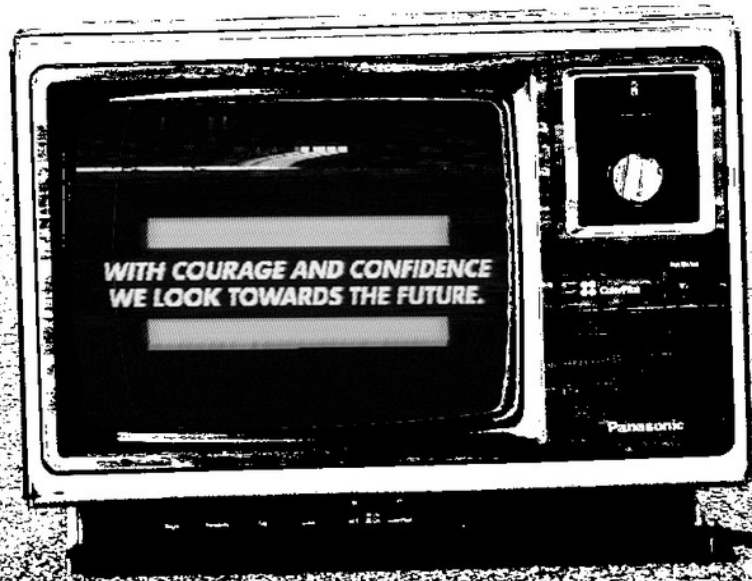


1. Defining the problem

OK

## Don't just accept the assignment

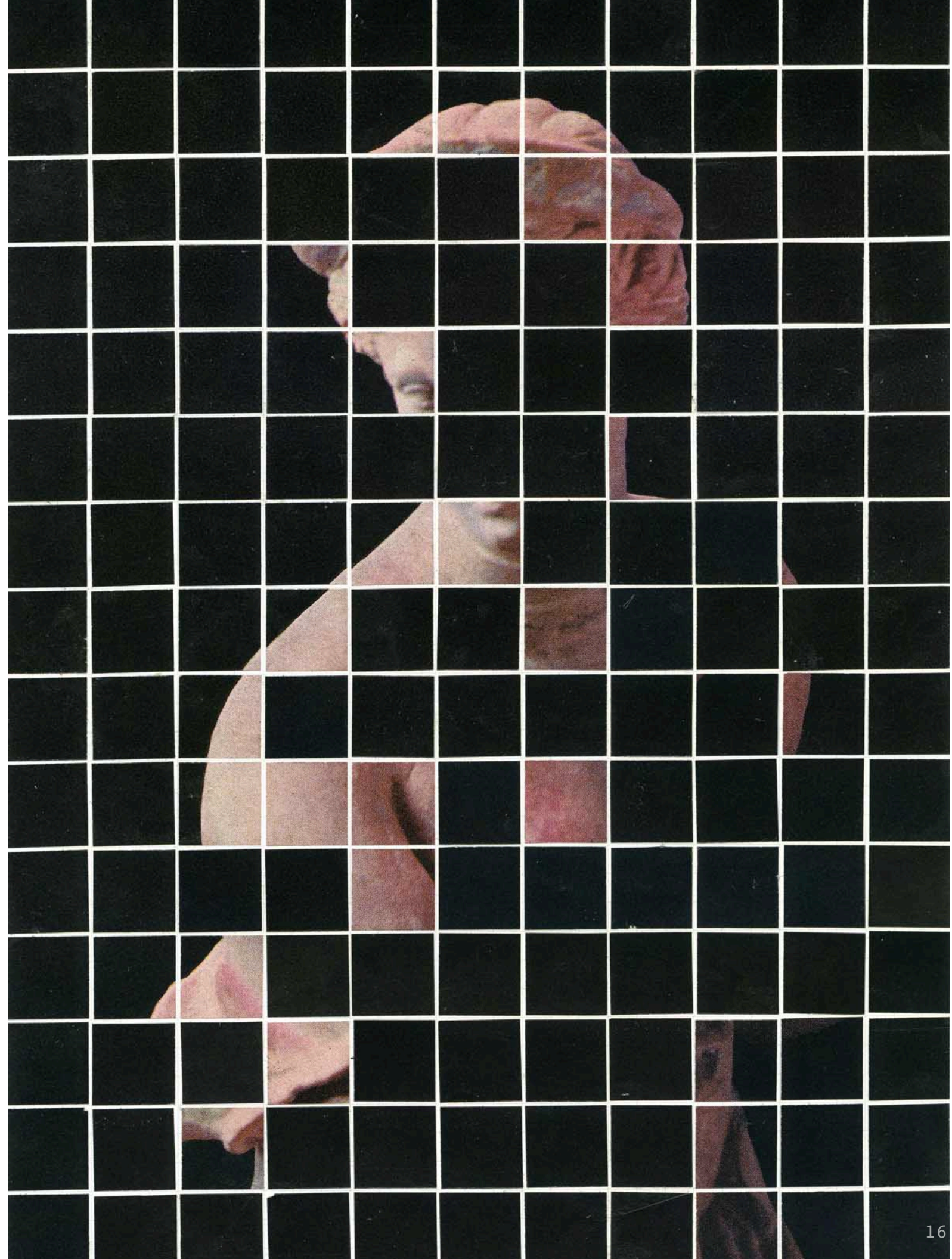
It's rare a brief or other assignment doesn't need to be reframed or explored in a fresh way to yield the best solution possible.



## **Seven Rules for Brand Growth**

After several bruising rounds of marketing myth-busting, HBG outlines 7 scientifically derived rules for brand growth:

- 1. Continuously reach all buyers of the category** (communication and distribution) – avoid being silent
- 2. Ensure the brand is easy to buy** (communicate how the brand fits with the users life)
- 3. Get noticed** (grab attention and focus on brand salience to prime the users mind)
- 4. Refresh and build memory structures** (respect existing associations that make the brand easy to notice and easy to buy)
- 5. Create and use distinctive brand assets** (use sensory cues to get noticed and stay top of mind)
- 6. Be consistent** (avoid unnecessary changes, whilst keeping the brands fresh and interesting)
- 7. Stay competitive** (keep the brand easy to buy and avoid giving excuses not to buy (i.e. by targeting a particular group))





# To

## Business

- To increase sales volume
  - To maintain sales volume
  - To generate sales leads
- 

## Marketing

- To enhance brand reputation
  - To consolidate loyal users
  - To recruit new users
- 

## Comms

- To bring brand to their attention
- To remind them of benefits
- To correct negative perception

# By

By recruiting new users  
By consolidating loyal users  
By enhancing brand reputation


---

By correcting a negative perception  
By reminding them of brand benefits  
By bringing brand to their attention

---

By dramatizing the benefit  
By doing a side-by-side comparison  
By electing an "expert" sales person

**Framework For Category**

**Entry Points** 

### **Why?**

**Why are they buying from the category?**

e.g. because I need a pick me up

### **When?**

**When are they buying from the category?**

e.g. after work

### **Where?**

**Where are they buying from the category?**

e.g. at the train station

### **With Whom?**

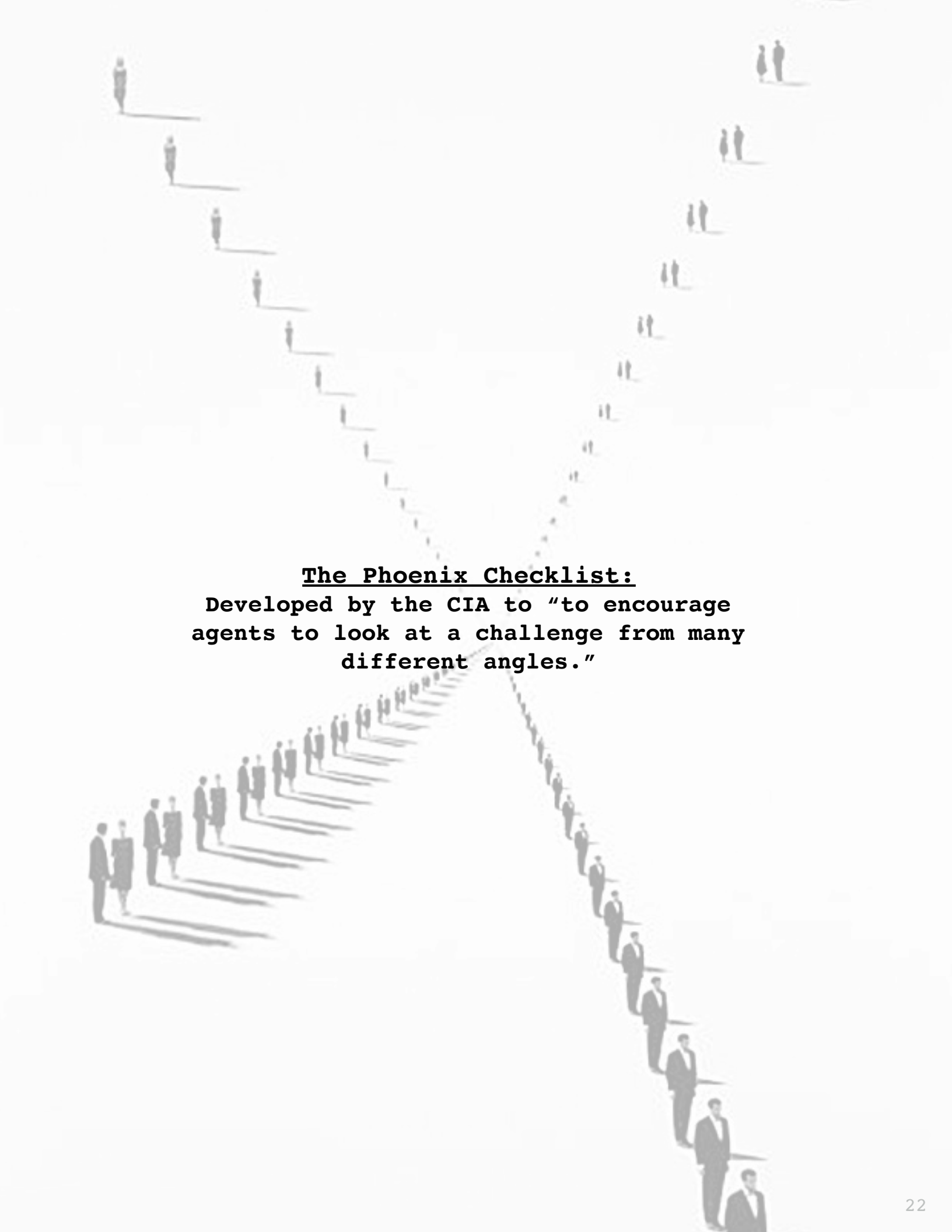
**With whom are they buying from the category?**

e.g. with their work friends

### **With What?**

**With what are they buying from the category?**

e.g. with alcohol



**The Phoenix Checklist:**

Developed by the CIA to “to encourage agents to look at a challenge from many different angles.”

---

Why is it necessary to solve the problem?

---

What benefits will you receive by solving the problem?

---

What is the unknown?

---

What is it you don't yet understand?

---

What is the information you have?

---

What isn't the problem?

---

Is the information sufficient? Or is it insufficient?  
Or redundant? Or contradictory?

---

Should you draw a diagram of the problem? A figure?

---

Where are the boundaries of the problem?

---

Can you separate the various parts of the problem? What  
are the constants of the problem?

---

Have you seen this problem before?

---

Have you seen this problem in a slightly different  
form? Do you know a related problem?

---

Try to think of a familiar problem having the same or a  
similar unknown

---

Suppose you find a problem related to yours that has  
already been solved. Can you use its method?

---

Can you restate your problem? How many different ways  
can you restate it? Can the rules be changed?

---

What are the best, worst and most probable cases you  
can imagine?

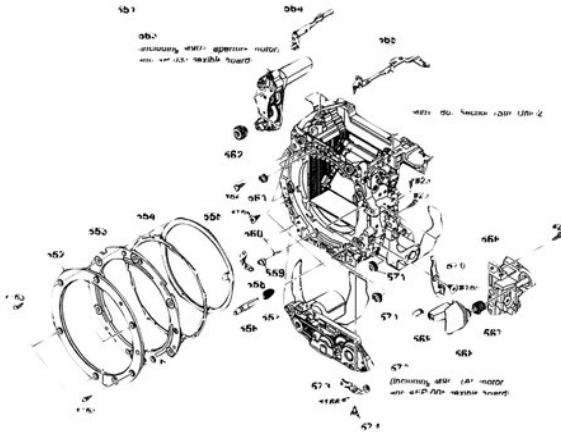
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## 2. Insights



indifference demands the extraordinary



Reductionism

thing = parts



we often do this...

...when what we want is this



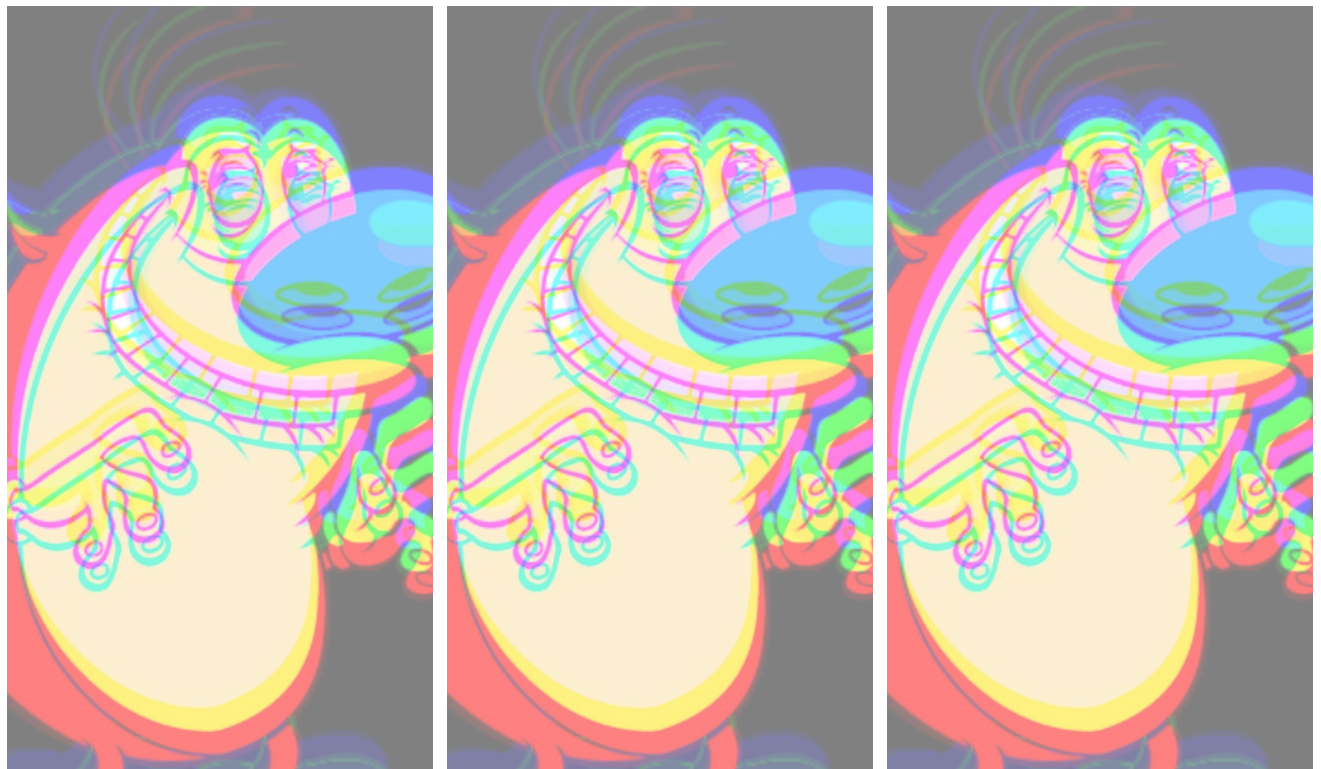
Emergentism

thing > parts



## **Start Doing Research Differently**

1. Don't only talk to the consumer. Talk to someone who spends their life understanding the target. Wife, kids, boss, subordinate, neighbor, garbage man, probation officer
2. Send them a disposable camera and a one-time brief
3. Get them to write something and word cloud it
4. Set up a video confessional booth
5. People love playing marketer. Give them your job
6. Think of the rote thing to do. Do the opposite
7. Get 10 smart people to write 10 Onion headlines for your brand or category
8. Go to their house as a forensic criminologist
9. Pitch ideas like this at your account people until you give them one that makes them think you're insane. Then do that one



Intellectual Mischief

## **Write a Discovery Brief.**

*Create a list of questions you need to answer via research in order to write an informed, substantiated brief. Questions will likely investigate topics such as:*

1. What has worked / not worked for the category in the past?
2. What have/are competitors done/doing?
3. Who are the current buyers? / Who are the current non-buyers?
4. Why aren't people buying it?
5. What motivates purchase (or hesitation) in the category?
6. What cultural conversations are related to the product, category, or brand?
7. What occasions is the product used in?
8. What are the conventions for advertising in this category (maybe to follow them, maybe to break them)?
9. What animates consumers about the product, category, or brand on social media?
10. What tension/controversy/fears exist in the category?
11. What does this product say about the buyer?

An aerial photograph of a dense forest with a path leading towards a bright light source, possibly a sunrise or sunset, creating a lens flare effect. The path is illuminated, and the surrounding trees are in shadow.

## Charting a course

What are the specific business goals?

Where will the business come from?

Who are the people associated with this growth?  
Where can we find them?

What do they think/feel/do today? Why? (point A)

What do we want them to think/feel/do? (point B)

What info or experience do they need to move from  
A to B? How?

When and where are they receptive to the brand/  
communications?

**Define who you don't want to be**

Franklin D Roosevelt said "I ask you to judge me by my enemies."

This forces you to accept that you aren't going to appeal to everyone.



e.g. this might come to life in a brief as  
**"Piss off vegetarians"**

## Speak to real people, not aggregates

To base communications on the amalgamated average of millions of individuals is missing the richness and nuance that lead to real human insights;

If your segment is populated by different people who want different things, it is not a segment. It's a joke and so are your skills as a marketer.

////

“36, has kids, enjoys down time with her family, watching movies with her husband and treating herself after a long day”

vs.

“Hagen Dazs is the ice-cream I hide from my kids so that me and my husband can eat it when they've gone to bed, sharing the spoon”.

**BORING**

**VIVID**



## **The danger of averages;**

The average person is a 24 year old Chinese man named Mohammed with a cell phone and no bank account.

## 7 ways to get numbers that matter

1. Be **vigilant**. Looking every day for something that could make matters easier
2. Search **outside** the usual sources
3. Get **more** minds on it
4. Juxtapose. Put related numbers together to create **new** information
5. Try different **contexts**. What's the social angle? The emotional angle? Put it in terms of time or length or volume
6. Turn them **over**. 2% one way might not be as interesting as 98% the other way
7. Field questions **nobody's** asking
8. Compare it to something unrelated and **absurd**

*e.g. Amount of people killed by cattle every year // number of films Nicholas Cage has appeared in // odds of winning on a \$20 scratch ticket // total number of space launches this year // total panels drawn by Bill Waterson // Acres of pear trees in the U.S. //... **Just make it drive home your point.***

**A beginner's guide to writing an insight:**

1. List what you've found
2. Select what you haven't heard before
3. Play with this pattern: "We thought X but it's really Y"

*e.g.: We thought alcoholism was just about the drug but, really, it's people trying to fill a hole*

4. Rewrite

– MarkPollard


## Do you have an insight?

- Have you done the kind of research nobody else is doing?
- Do you know what's going to make people care about what you have to say?
- Where is the conflict? The ~~tension~~ tension?
- Does it have the potential to make an audience **feel** something?
- Do you have a human truth that isn't immediately obvious?  
(an insight, not an observation)

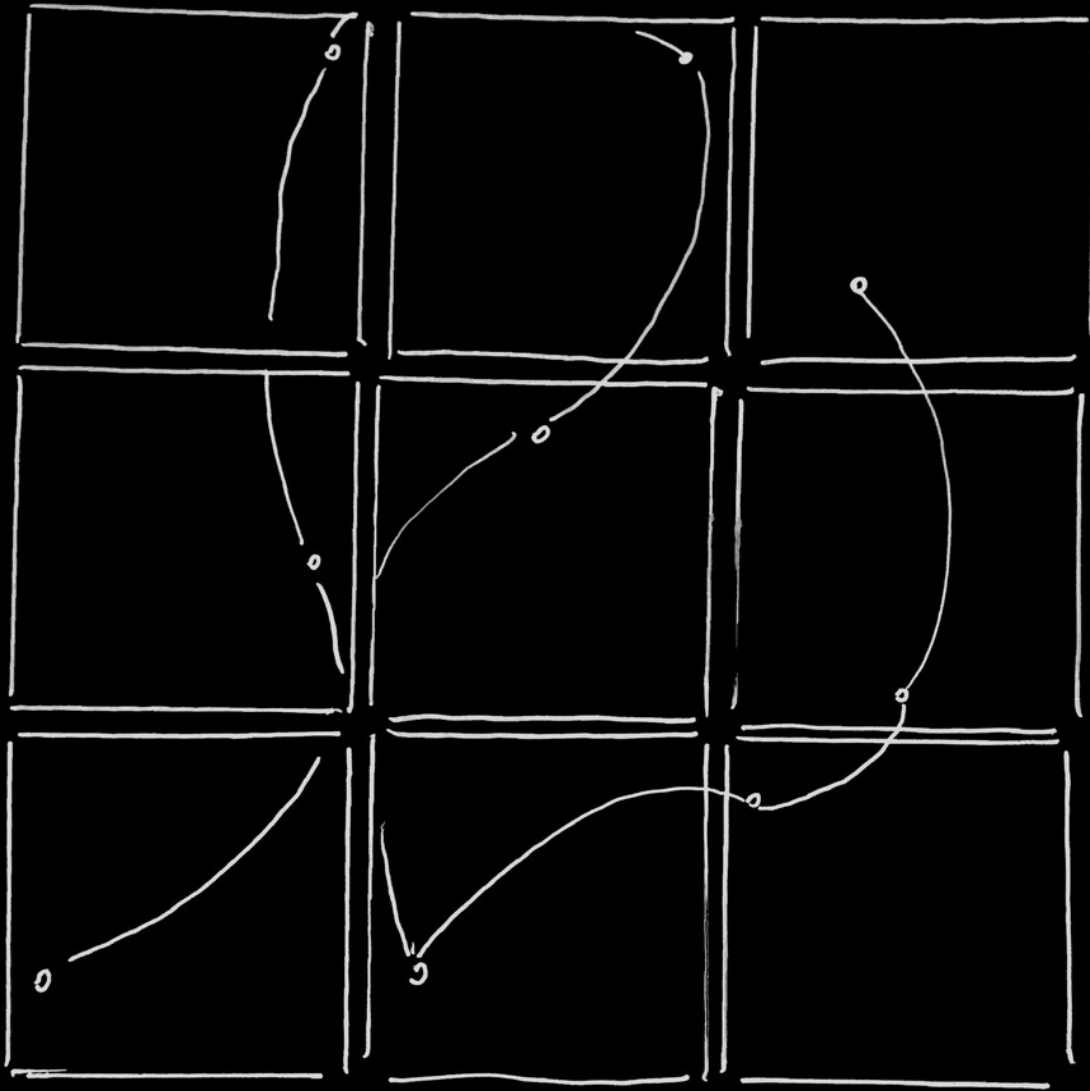
something that would make somebody say:

"Oh fuck,  
That's true!"



A sky with a gradient from blue to pink and purple, with a layer of white clouds below.

There's no amount of tears that a  
drive-through burger at 5am can't dry.



### 3. Writing the brief



You don't get to decide this picture,  
but your brief should be strong  
enough to prompt it

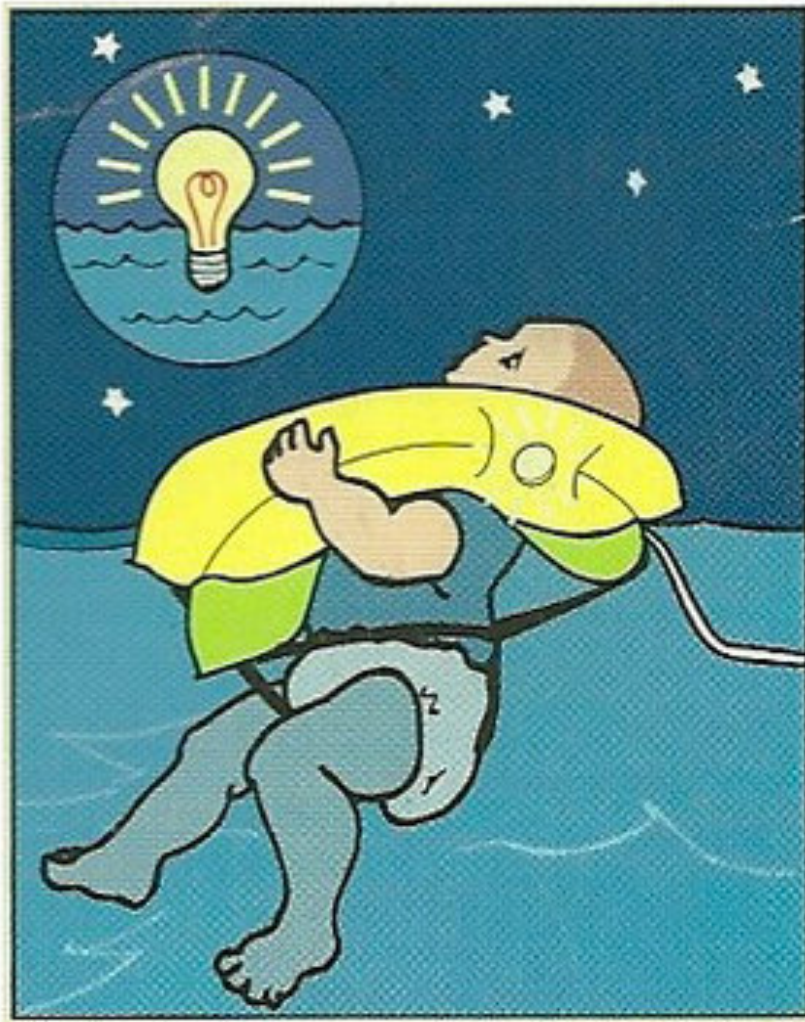


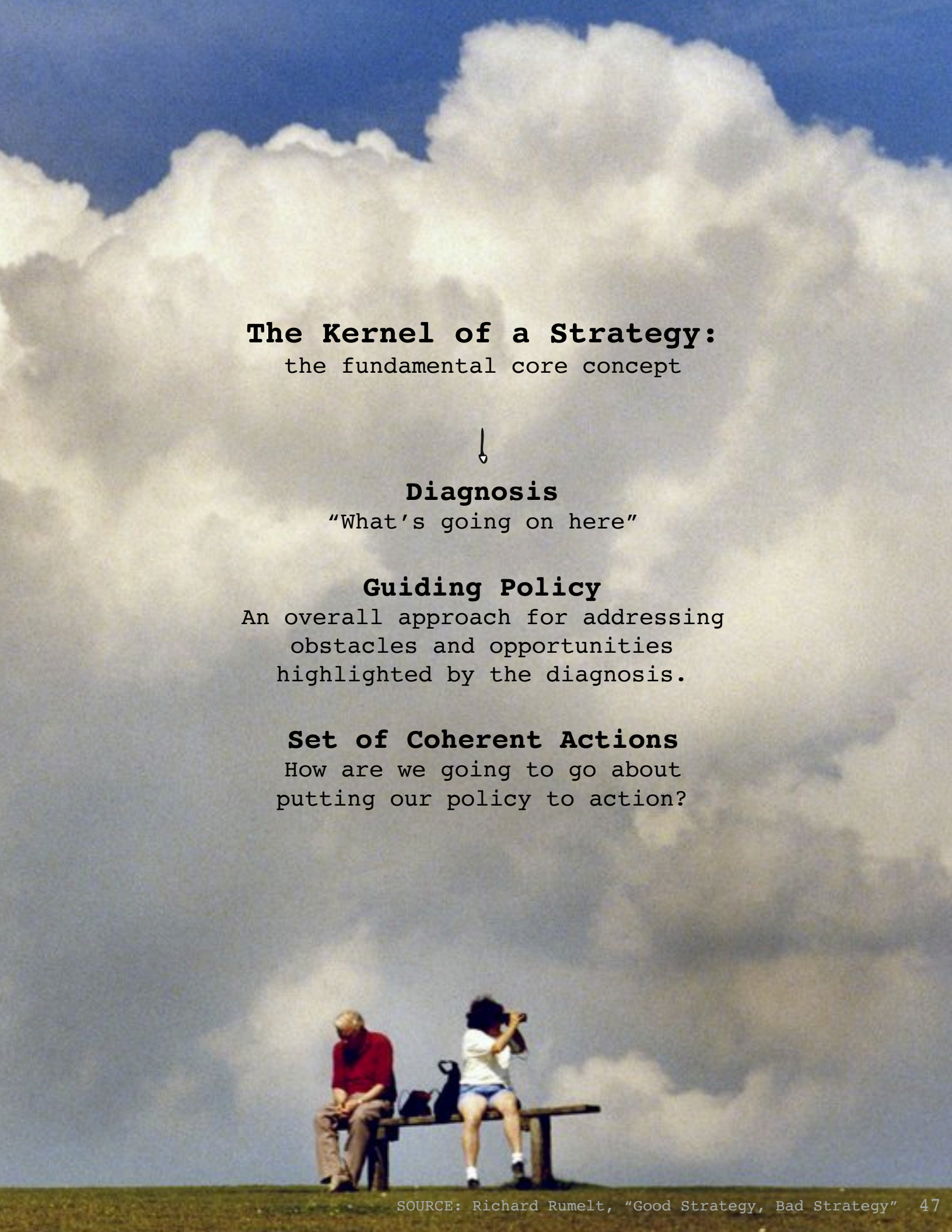
e.g.

~~Paint the  
ceiling~~

vs.

evoke God's love  
of his followers





**The Kernel of a Strategy:**  
the fundamental core concept



**Diagnosis**  
“What’s going on here”

**Guiding Policy**  
An overall approach for addressing  
obstacles and opportunities  
highlighted by the diagnosis.

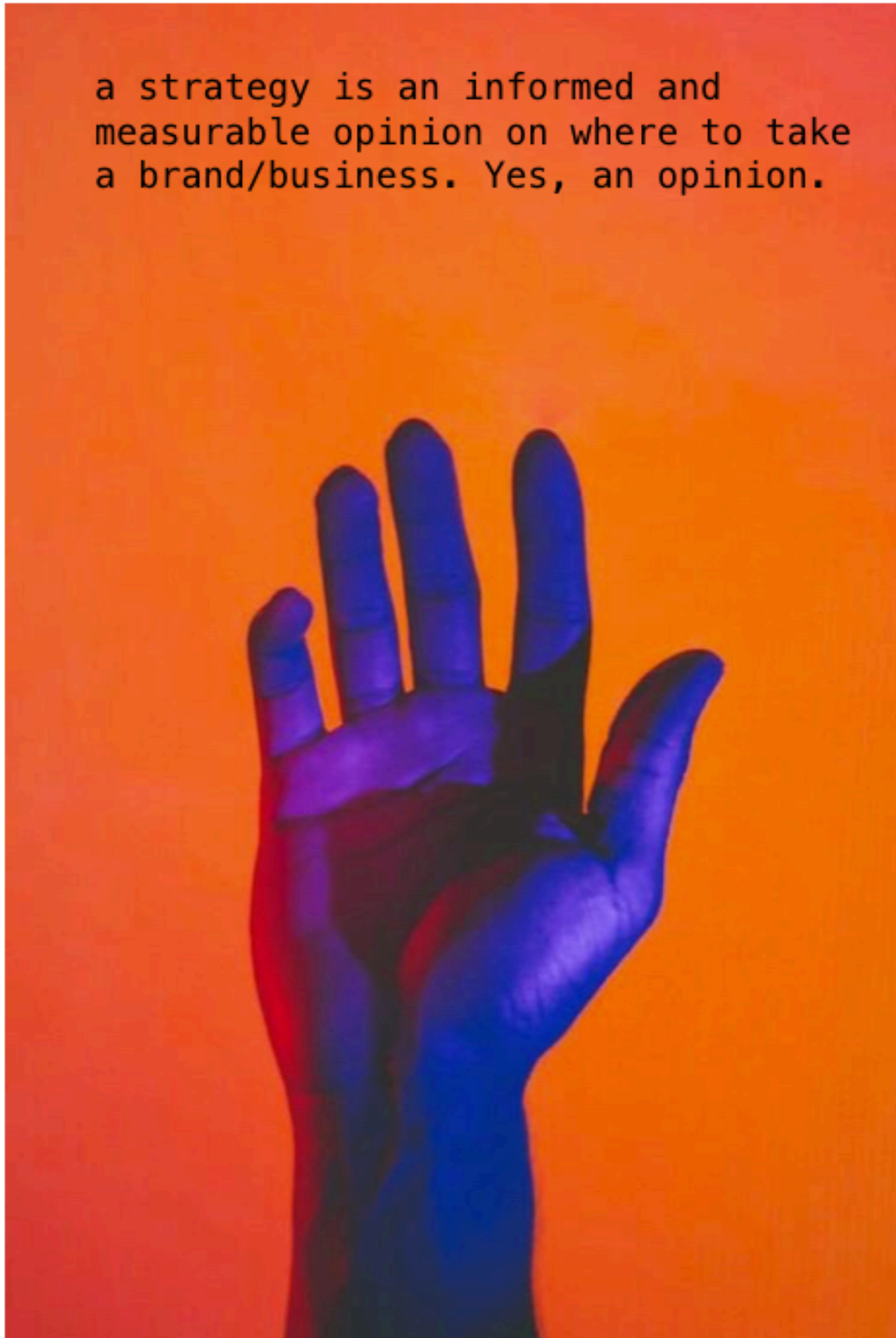
**Set of Coherent Actions**  
How are we going to go about  
putting our policy to action?

Imagine what the creative team might come up with without a brief.



A good brief should avoid this outcome in favor of something infinitely better

a strategy is an informed and measurable opinion on where to take a brand/business. Yes, an opinion.



What **DECISION** have you made?

Pain  
is  
Mandatory

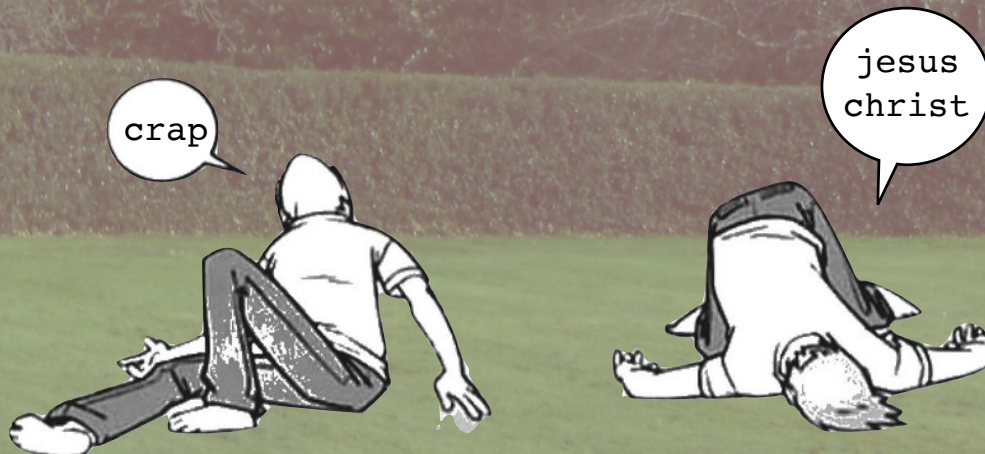


## Take the painful road to the idea

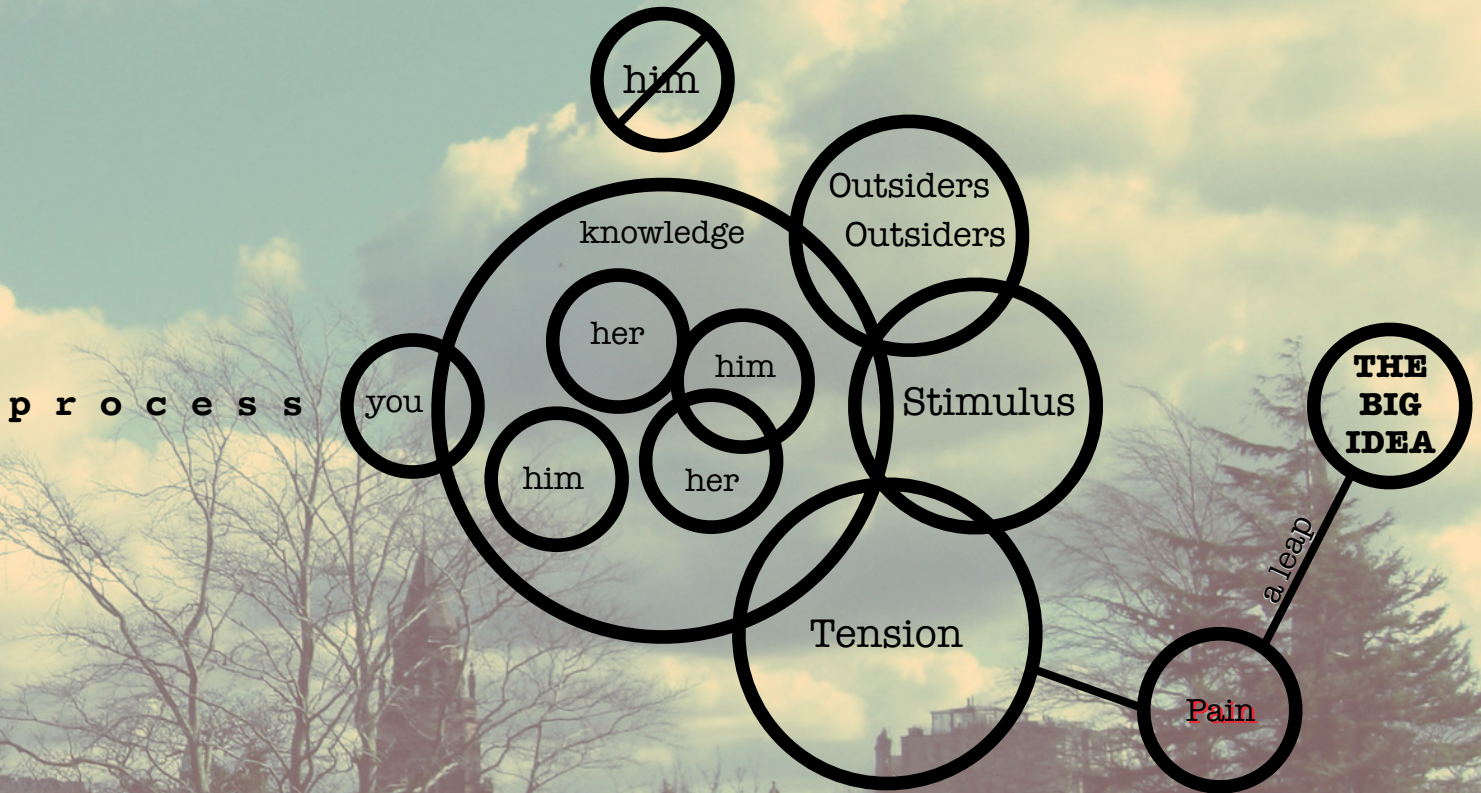
Other people and pain are the two components that not-so-clever people usually avoid.

You need both.

You need other points of view. You need stimulus. You need strife, extra information, rigor and imagination. You need patience.



If you play the lone wolf, chances are you'll come up with something that isn't any good or worse— something that is just "good enough"



THERE WILL BE  
NO MIRACLES  
HERE



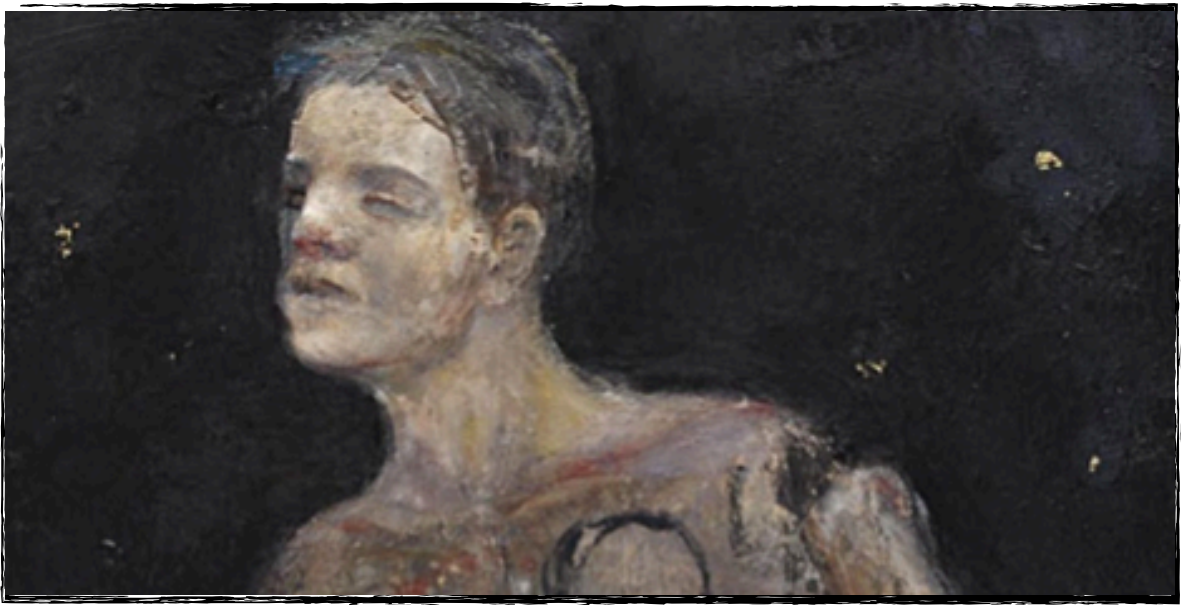
What is the real problem that needs to be solved?




How will we measure success?



What excites you about  
the assignment?

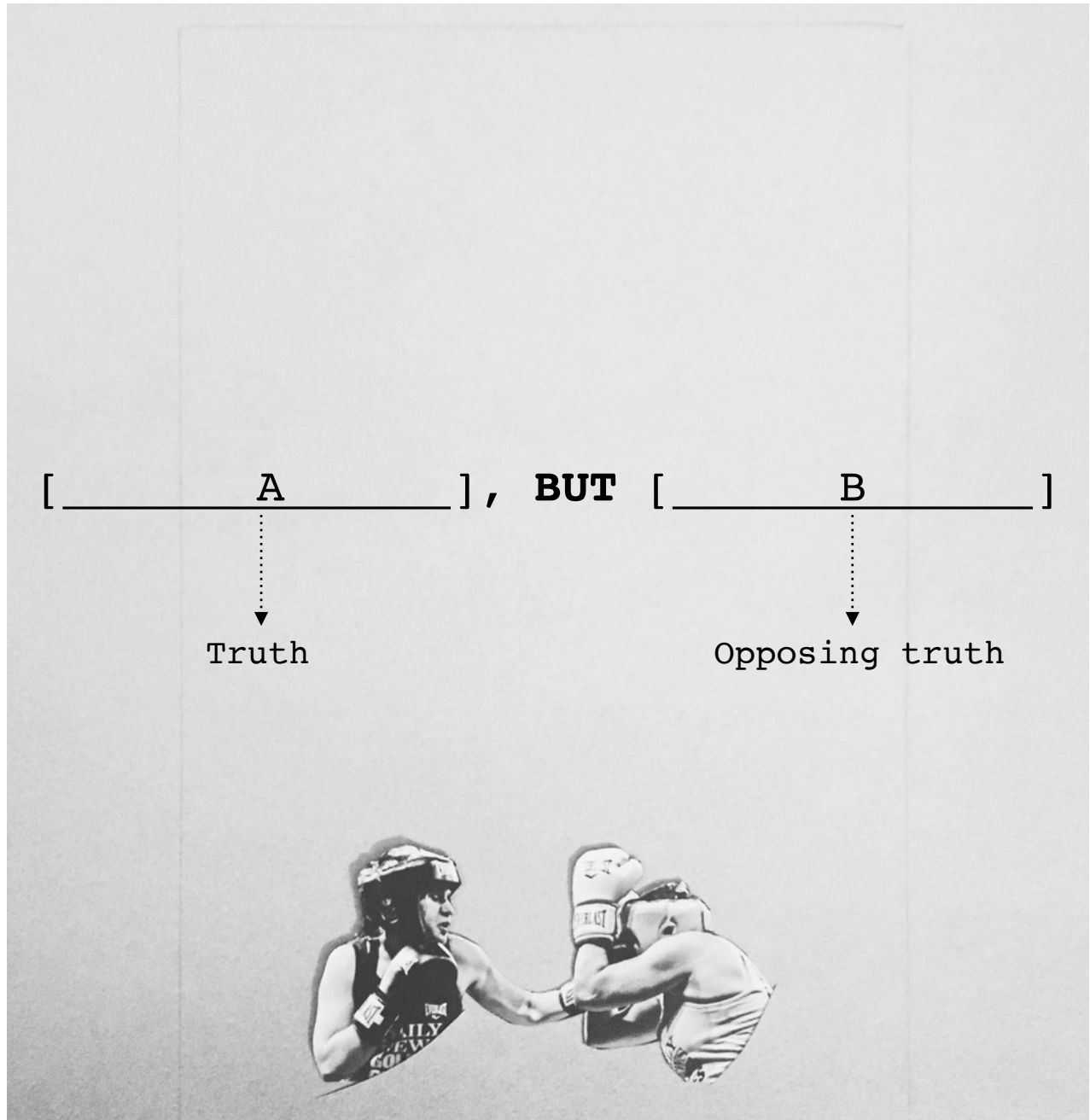


What concerns you about  
the assignment?

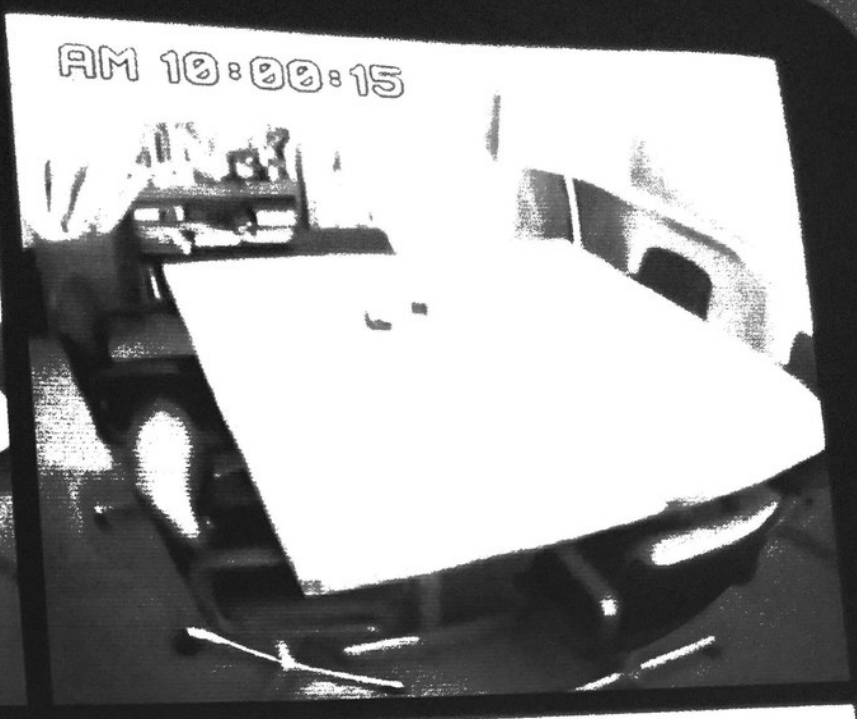
- 
1. Where are we?
  2. How did we get here?
  3. Where do we want to go?
  4. How do we get there?
  5. How will we know when we're there?

"History is not about the conflict between right and wrong. It is the conflict between two rights."

—Georg Wilhelm Friedrich Hegel



*Do this exercise with truths & opposing truths  
for the brand, the consumer, and culture*



**There are 6 potential areas of  
focus for communications**

**Top of Mind**

The symbol of  
the brand  
(Awareness).

**Attribute**

The reason to  
believe: What  
the product  
has, does.  
The DNA of  
the brand.

**Benefit**

The benefit  
to the  
consumer:  
rational or  
emotional

**Territory**

The world,  
real or not,  
built around  
the brand.

**Value**

The brand's  
values/  
attitudes/  
convictions.

**Role**

The role in  
the life of  
the consumer,  
or in society.



**PROBLEM**

The human problem  
behind the business

**INSIGHT**

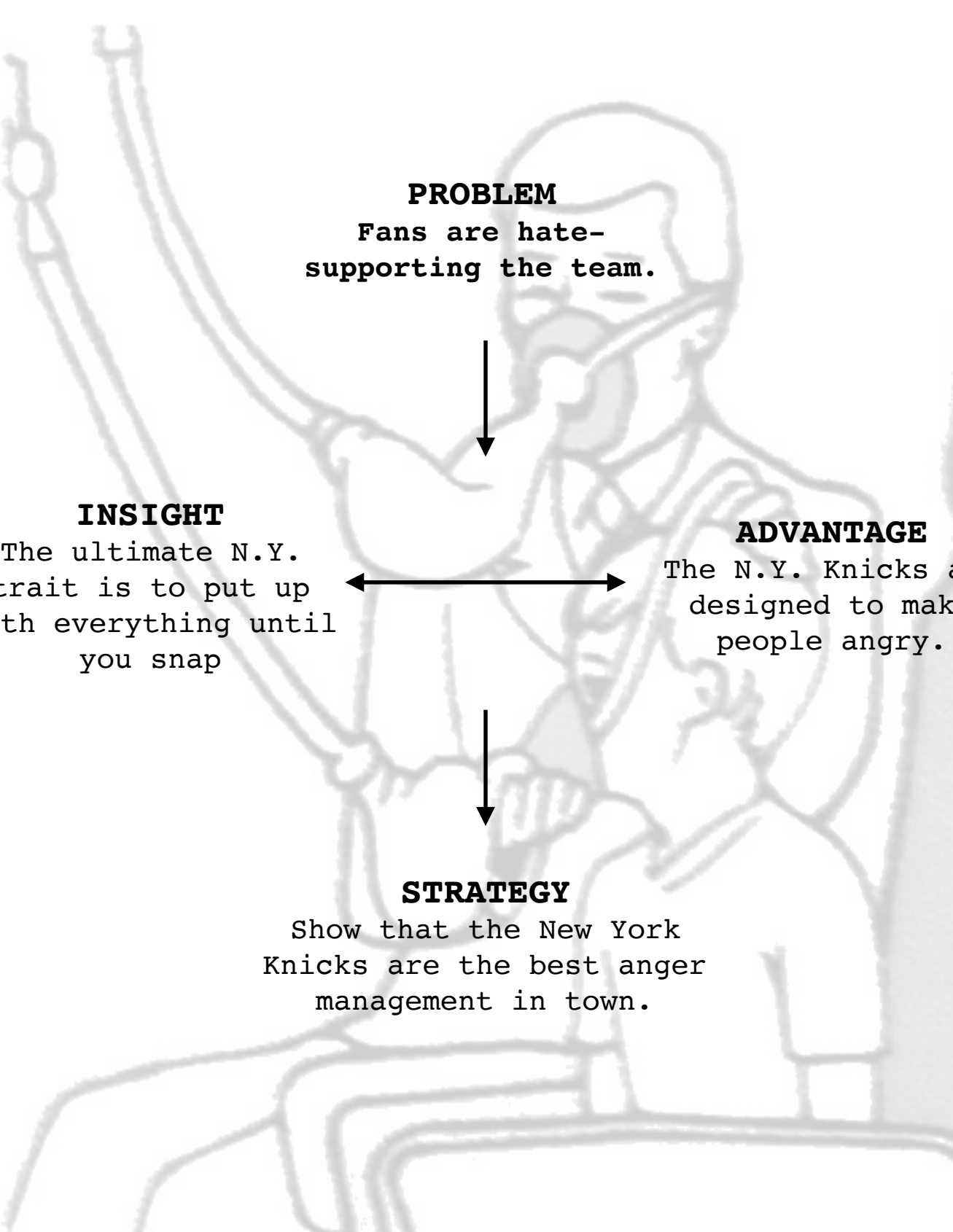
An unspoken truth  
that sheds light on  
the problem.

**ADVANTAGE**

What makes you  
unique/motivating in  
people's minds.

**STRATEGY**

A way of seeing the  
business based on all that.



**PROBLEM**  
Fans are hate-supporting the team.

**INSIGHT**  
The ultimate N.Y. trait is to put up with everything until you snap

**ADVANTAGE**  
The N.Y. Knicks are designed to make people angry.

**STRATEGY**  
Show that the New York Knicks are the best anger management in town.



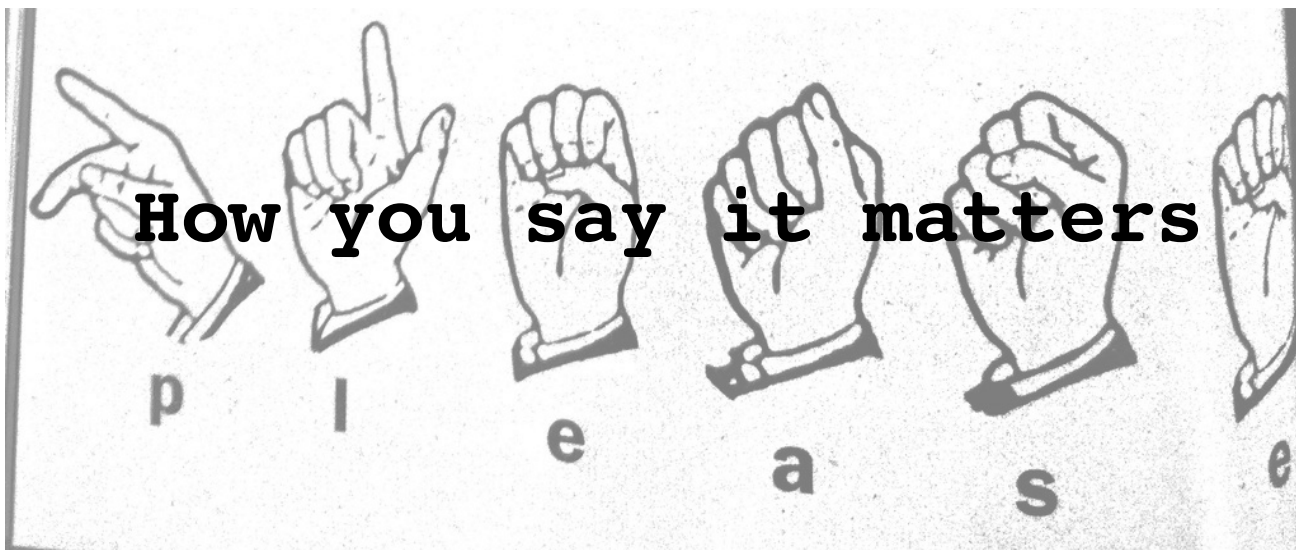
**Make the decision easy**

People use heuristics to make '**good enough**', not perfect, decisions.

People are not rational, involved or deeply committed buyers, but **uncaring cognitive misers** who rely upon

# HEURISTICS

to reduce the effort in making a buying decision to a minimum.



Words can be more  
impactful than  
violence

————— The pen is  
mightier than the  
sword

Consumers of a  
similar typology  
exhibit similar  
behavior

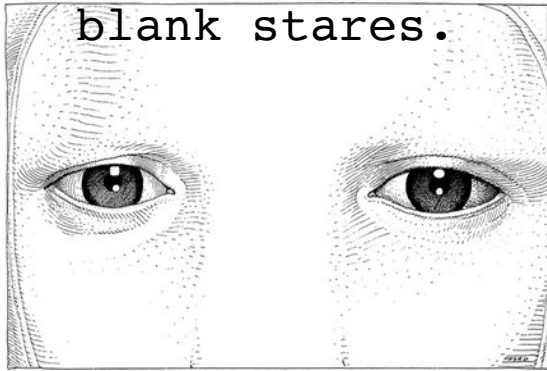
————— Birds of a  
feather flock  
together

Polaroid cameras  
don't just take  
pictures, they  
create a social  
activity

————— A polaroid camera  
is a social  
lubricant

# Try re-phrasing it

When an executive asked employees to brainstorm "**ways to increase productivity**" all he got back were blank stares.



When he rephrased the request as "**ways to make their jobs easier**" he could barely keep up with the amount of suggestions.





Sum shit up in a novel way

~~Try a few different versions  
of how you write it.~~

///

~~Play around with how it's  
framed.~~

///

~~Write it differently until  
something comes to light~~

///

Re-write it a bunch of ways.  
New stuff will bubble up.

People believe [X], but [Y] is  
actually true

\*\*\*\*

You know what's funny?

\*\*\*\*

You know how [X]?

\*\*\*\*

\_\_\_\_\_ except \_\_\_\_\_

\*\*\*\*

\_\_\_\_\_, but \_\_\_\_\_

\*\*\*\*

\_\_\_\_\_ / \_\_\_\_\_

\*\*\*\*

How many times \_\_\_\_\_  
\_\_\_\_\_  
Wouldn't it be better  
if \_\_\_\_\_?  
\_\_\_\_\_?

Who hasn't \_\_\_\_\_  
\_\_\_\_\_?

You know how \_\_\_\_\_  
\_\_\_\_\_  
Well what if \_\_\_\_\_  
\_\_\_\_\_

People \_\_\_\_\_  
\_\_\_\_\_  
So \_\_\_\_\_  
\_\_\_\_\_

People may not say it  
openly, but the truth  
is \_\_\_\_\_  
\_\_\_\_\_

You're familiar with \_\_\_\_\_  
\_\_\_\_\_  
Well what if \_\_\_\_\_?  
\_\_\_\_\_?

In spite of what we  
tell ourselves, the  
truth is \_\_\_\_\_  
\_\_\_\_\_

Despite \_\_\_\_\_,  
You \_\_\_\_\_.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**When do we matter most to people?**

**When do we matter least?**

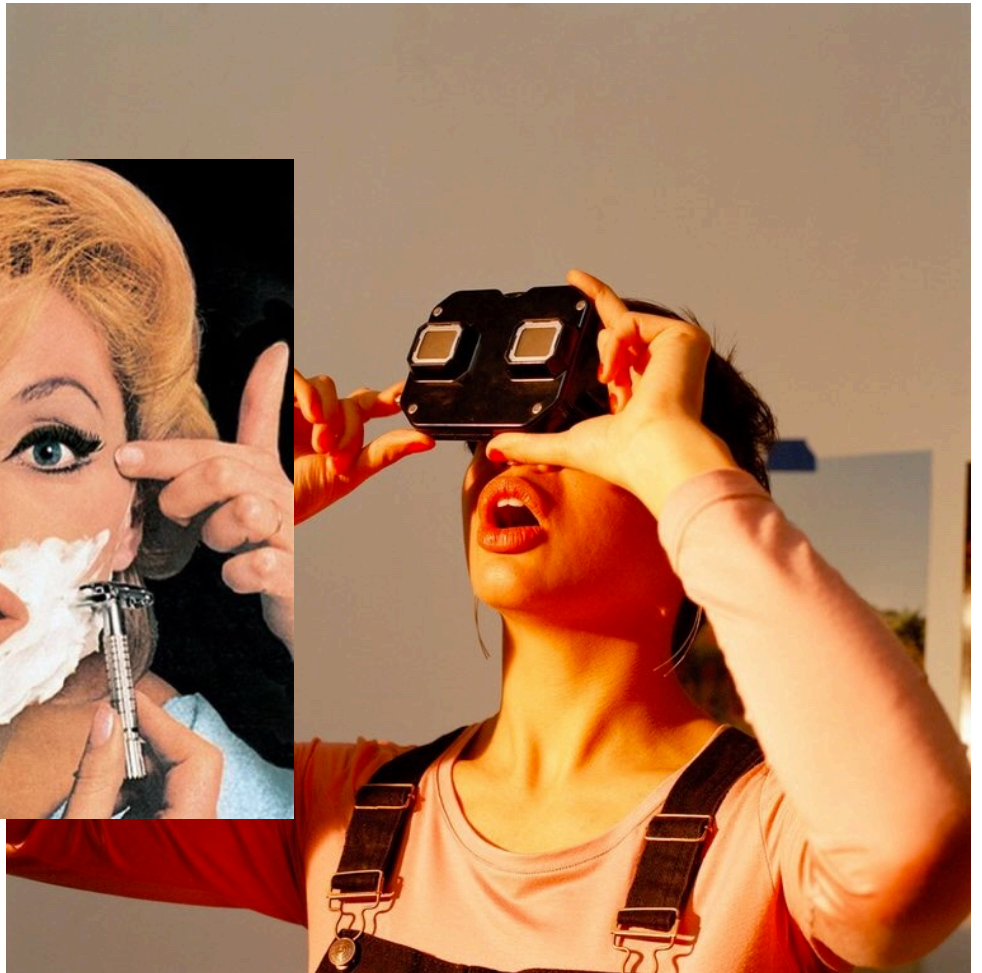
XXXVI



When/how could you  
transform someone's day?



**How could you shock someone  
with your brand?**





**If your brand were to  
fight its rival, when and  
where would it stand the  
best chance of winning?**



**When do people wish you were  
available more often?**



**FOR**

(your audience)

(your product)

**IS A**

(category name)

**WHICH PROVIDES**

(main benefit)

**UNLIKE**

(competitor)

**WHICH PROVIDES**

(competitor's main benefit)

**Positioning**

**Campaign**

**Barrier 1**

**Barrier 2**

**Comms Task 1**

**Comms Task 2**

**Tactics**

**Tactics**

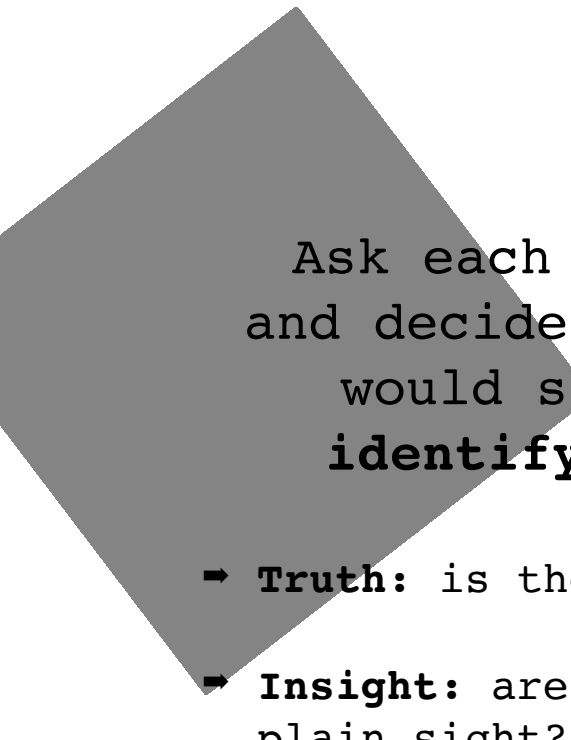


Don't try to be relevant to culture.

**Resonate** with Culture.

Resonate  
Resonate  
Resonate  
Resonate





Ask each question of the strategy and decide if there is anything that would sharpen it. **If it fails, identify what needs to be done.**

- **Truth:** is there a simple, human truth?
- **Insight:** are your truths really hidden from plain sight?
- **Tension:** Where's the conflict?
- **Surprise:** Which part won't people expect?
- **Brevity:** Can you tell the story in three sentences?
- **Simplicity:** Would your 10 year old niece understand it?
- **Bulletproof:** Will it withstand the tough questions?
- **Reconcile:** Does it answer the assignment?
- **Endgame:** what could be the unhappy ending to this story be?
- **Sparkplug:** What's the single word that fires everything up?
- **Metaphor:** what's the parallel story?

Can you tell your story in 10  
consumer quotes or less?



“ ”

“ ”

“ ”

“ ”

“ ”

“ ”

“ ”

“ ”

“ ”

“ ”

If not,  
that's a bad sign...



**What makes a good brief?**

**CLARITY  
BREVITY  
FERTILITY**

**See if you can answer these questions  
based on where you are right now;**

- ➔ What's the behavior you want to change?
- ➔ What insight makes you think you can?
- ➔ When is your consumer most interested?
- ➔ When could it trigger their interest in us?
- ➔ When could it tip the balance in our favor?
- ➔ When do they want to feel the emotion we offer?
- ➔ When do they experience the benefit we'd give them from something else?
- ➔ When could we reach them when our competition can't?

## **Things that make a number great**

1. It helps identify the substance and scale of the opportunity we can create for clients
2. It links inexorably to the insight, making the sum greater than the parts
3. It is truly "holy shit" in nature. Unexpected, provocative, and perhaps a bit startling. Empirical Inspiration

## **Things that make an insight great**

1. It identifies how we can better connect with people at a deep, truthful level.
2. It links inexorably to the number (doesn't just re-state it) making the same greater than the parts.
3. It clearly leads to a potential solution or highlights the opportunity.

## **Things that make a strategy great**

1. It illuminates a clear way forward solving for the tension built in between the number and the insight.
2. It suggests an action that the creatives can take to elicit the right behavior change
3. It's evident it has been informed by context and makes room for contextual interpretation in the creative platform.

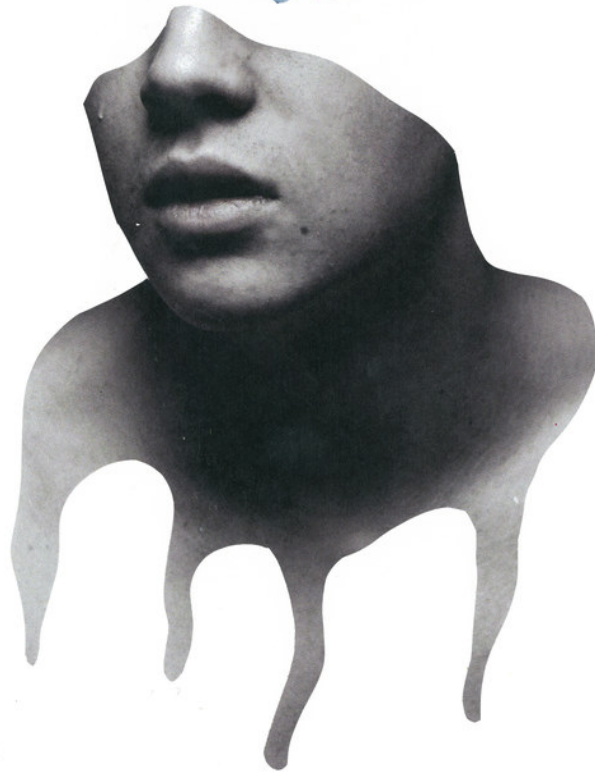


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52 52 54 36 8 5 5 6 6 5 6 28 55 32 32 54 53 51 51 51 51 44 25 51 51 49 49 50 49 48 46 46  
54 54 52 53 30 7 5 6 6 5 6 40 54 29 52 51 53 56 55 52 52 51 38 52 52 50 49 46 46 46 46 47  
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48 50 51 53 25 14 17 8 4 4 17 46 40 18 43 47 46 49 52 54 53 53 54 18 50 49 46 47 47 47 47 45  
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48 50 48 52 19 13 33 36 18 18 36 49 51 54 47 47 49 46 46 49 49 49 49 47 44 53 44 48 44 46 46 45

**What's the "Mind Blown" moment?**



The creative team should  
leave the briefing knowing  
something they didn't know  
when they walked in.



A.W.



**"Please work as hard on the  
brief and strategy as the  
creatives work on the ideas."  
- Creative Director**

**A good brief plays a role even after production has wrapped.**

**It is used to protect the work against inevitable cold feet.**

**Write your briefs with this in mind.**

**It is a contract that you will reference later.**

Today 11:37 AM

I think strategy should be the first line of defense when things go wrong





## 4. Evaluating the creative

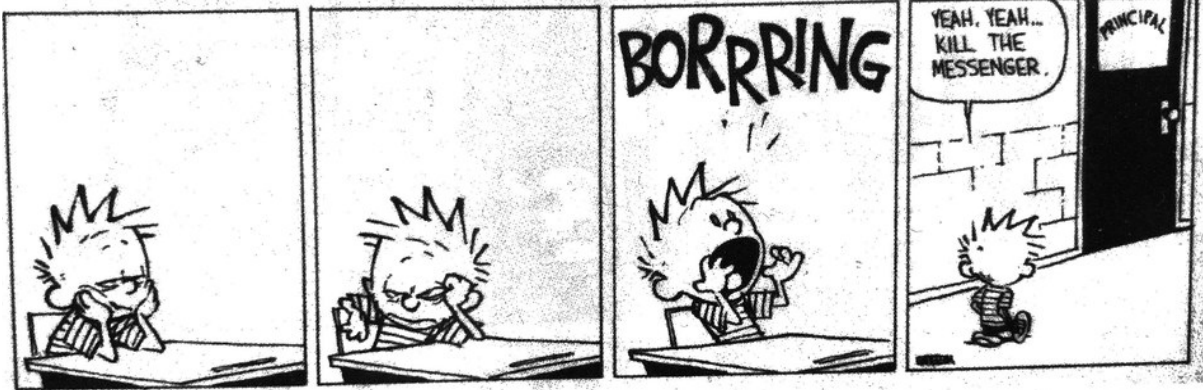
Why doesn't most  
advertising work?

Because it's  
"right."

It's been  
debated,  
discussed,  
argued, briefed,  
researched,  
debriefed, re-  
briefed,

until it's  
"right."





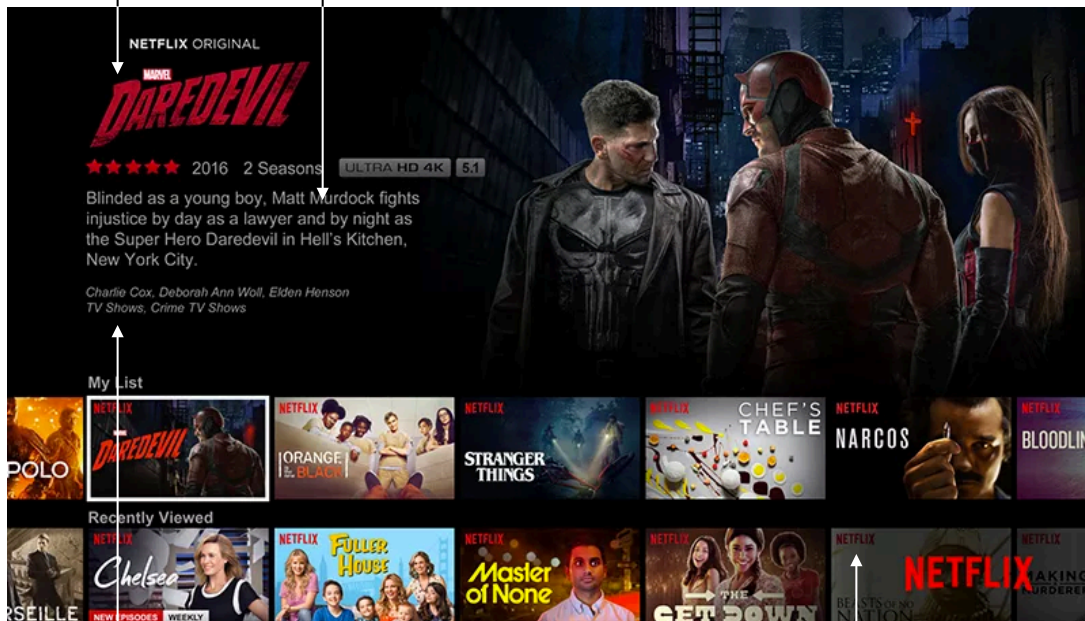


Make it abundantly  
clear how ideas should  
be presented back.

Netflix does a good job of summing up the idea behind the show in a compelling but clear way

The name of the idea

~140 character description



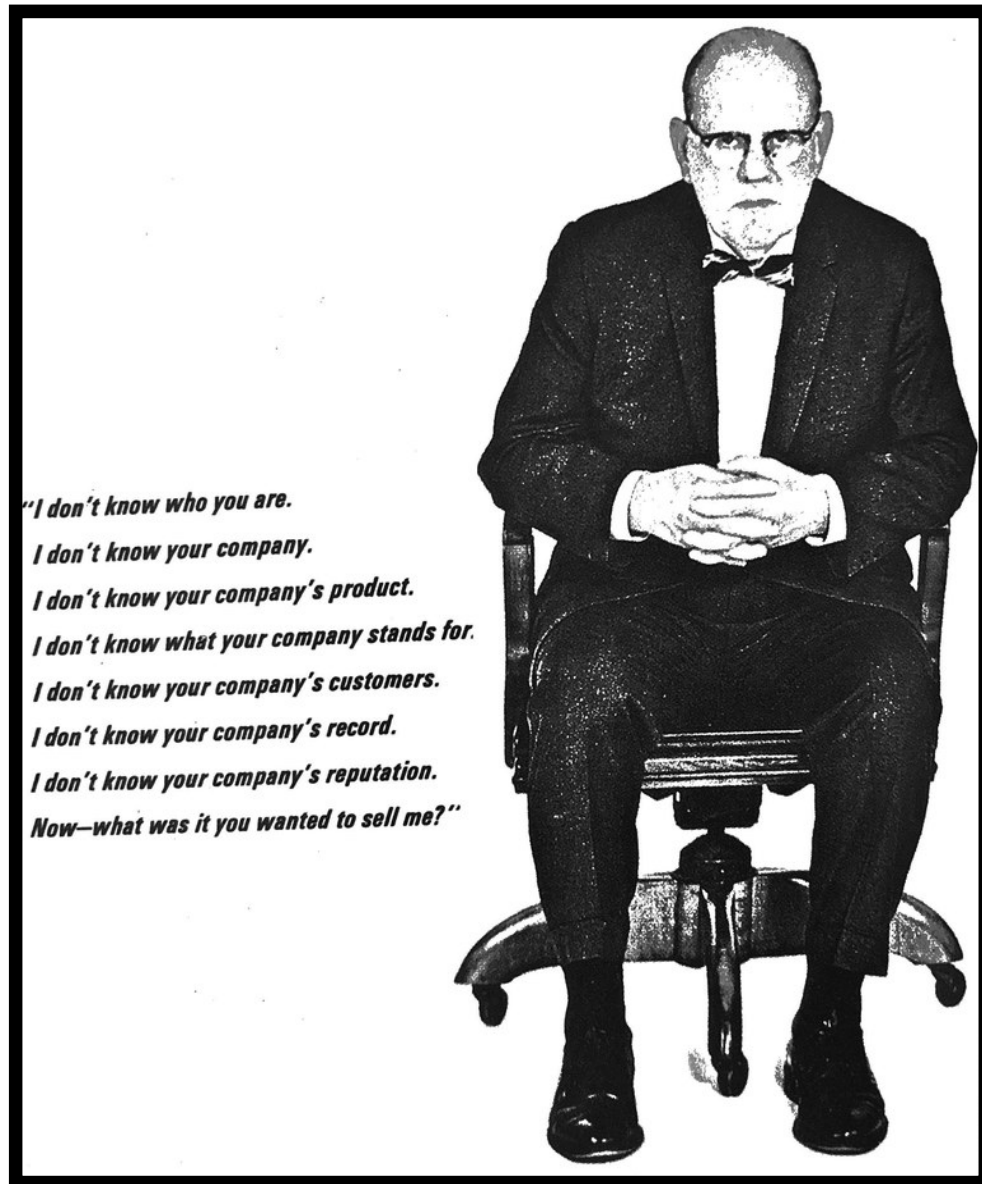
Key components/characters

Key Visuals/Comps

# Checklist for evaluating creative

1. Come prepared
2. Expect to be surprised maybe even made a little nervous
3. React to the idea as a whole
4. Add what's important and incremental
5. Make sure it's on strategy, not on checklist
6. If it doesn't connect emotionally, it doesn't connect
7. Remember what the work is trying to accomplish
8. Don't just talk about what's not working for you
9. See problems? Don't offer solutions, explain the problem
10. Remember you don't have to find something wrong
11. A creative idea needs creative direction not group consensus.





*"I don't know who you are.  
I don't know your company.  
I don't know your company's product.  
I don't know what your company stands for.  
I don't know your company's customers.  
I don't know your company's record.  
I don't know your company's reputation.  
Now—what was it you wanted to sell me?"*

it should always be:

**NOTICABLE, MEMORABLE, IRREFUTABLE**

Just move me dude.





Read 3:06 AM

**An honest conversation  
with the creative team**



**What well-meaning practice or habit is in fact frustrating?**

"The one pager should be getting all the love and the background deck is a nice to have, not the other way around."

"Trying to fit too much into a strategy."

**What's the one thing a strategist almost never thinks about that they should?**

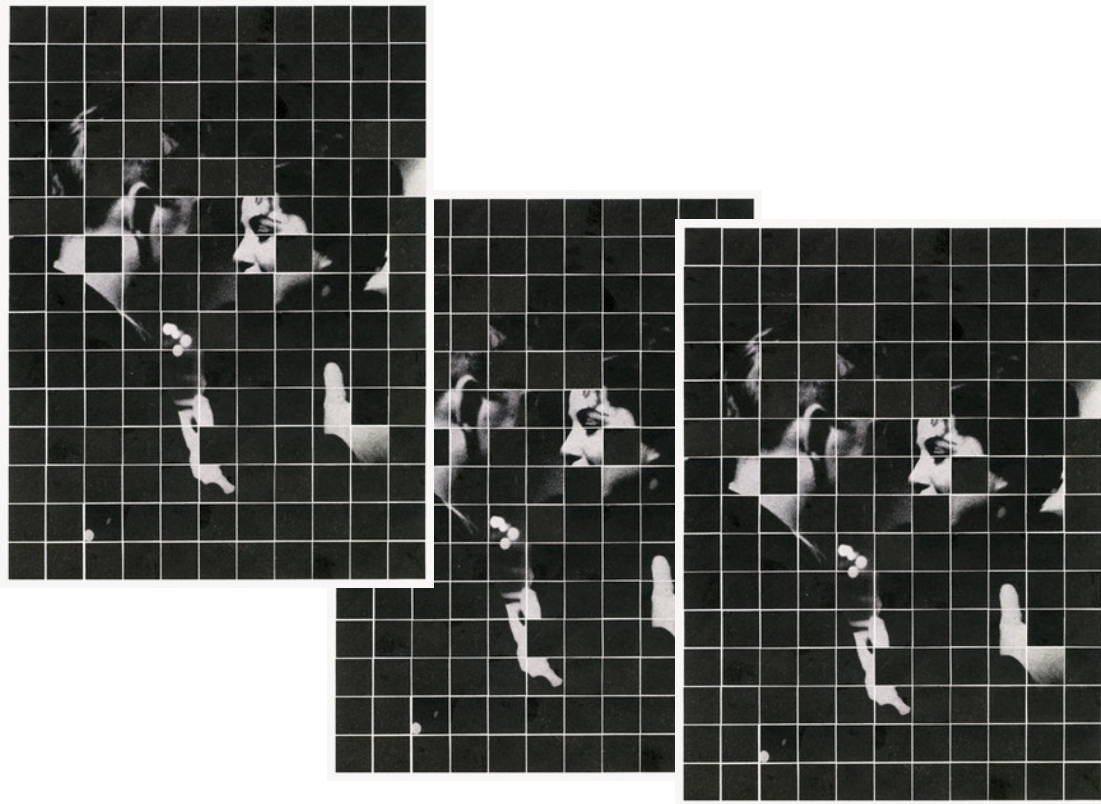
"How each creative works differently."

**If you could tell strategists one thing anonymously, what would it be?**

"Think in culture, not audiences."

"An insight is not a strategy."





**What is one thing about working with a creative team that strategists should always keep in mind?**

"We can come up with the ideas, what we really need are great insights we could never uncover."

**To you, what is the true purpose of a creative brief?**

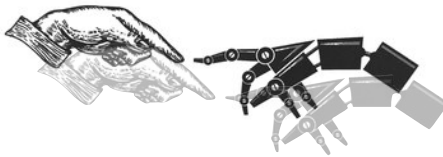
"It's a contract. An agreement on the path we'll take.

If the path goes in multiple directions or gives only vague direction (go north), they'll inevitably get lost & we'll all be split up wandering around."

## **How do you judge the quality of a brief?**

"The brief itself should be massively inspiring in terms of sharing new and unexpected information that creative "can build good work around."

If I'm scribbling all over the page while it is being presented."



## **When in a creative review, what is the most helpful way for feedback to be provided?**

"Earnestly. Rip the bandaid, but don't try to sugarcoat it if we are off-brief."

"Don't wear your 'client hat', wear your strategy hat"





What's the one thing a strategist almost never thinks about that they should?

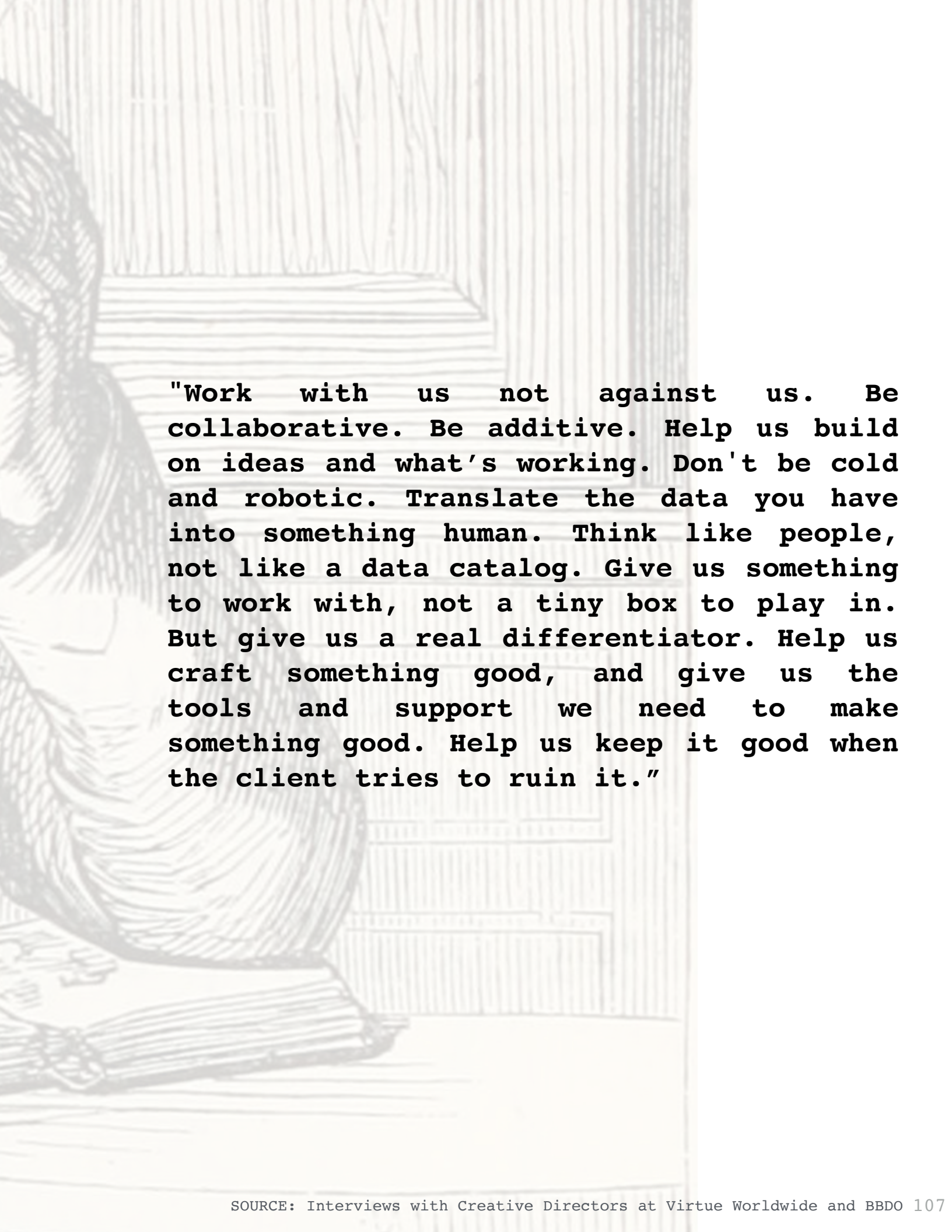
**"Staying late & bringing your laptop next to a creative, even if to work on something else, always helps.**



**It's the team mentality."**





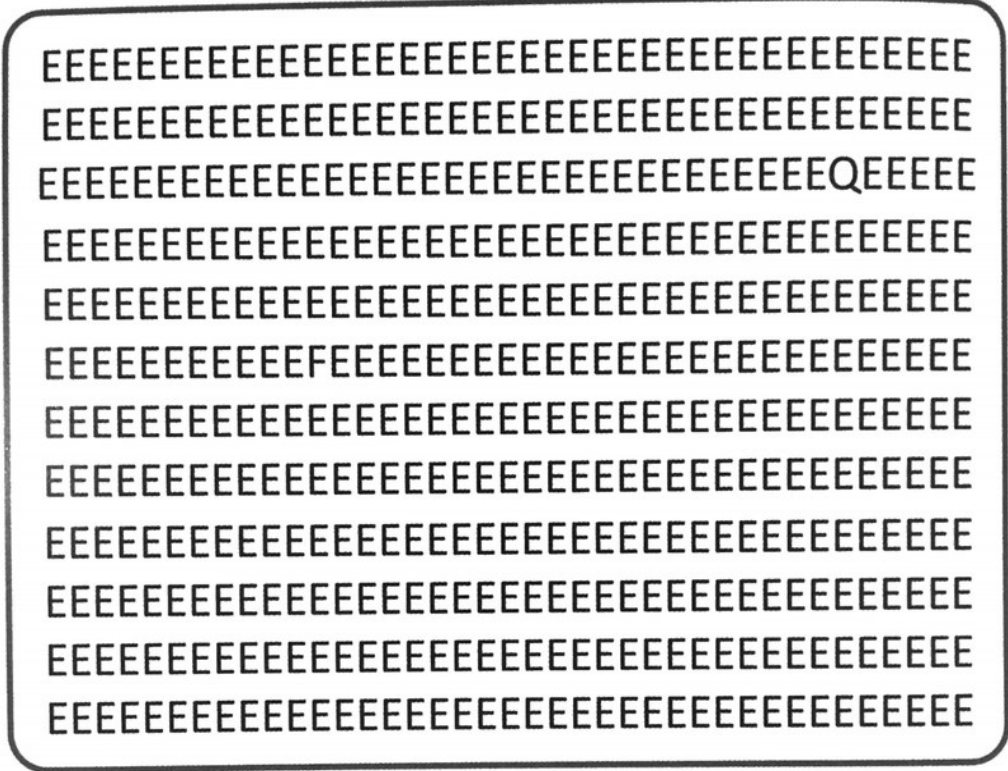


**"Work with us not against us. Be collaborative. Be additive. Help us build on ideas and what's working. Don't be cold and robotic. Translate the data you have into something human. Think like people, not like a data catalog. Give us something to work with, not a tiny box to play in. But give us a real differentiator. Help us craft something good, and give us the tools and support we need to make something good. Help us keep it good when the client tries to ruin it."**



**"This feels borderline reckless..**

**That's when I knew we were onto something."**



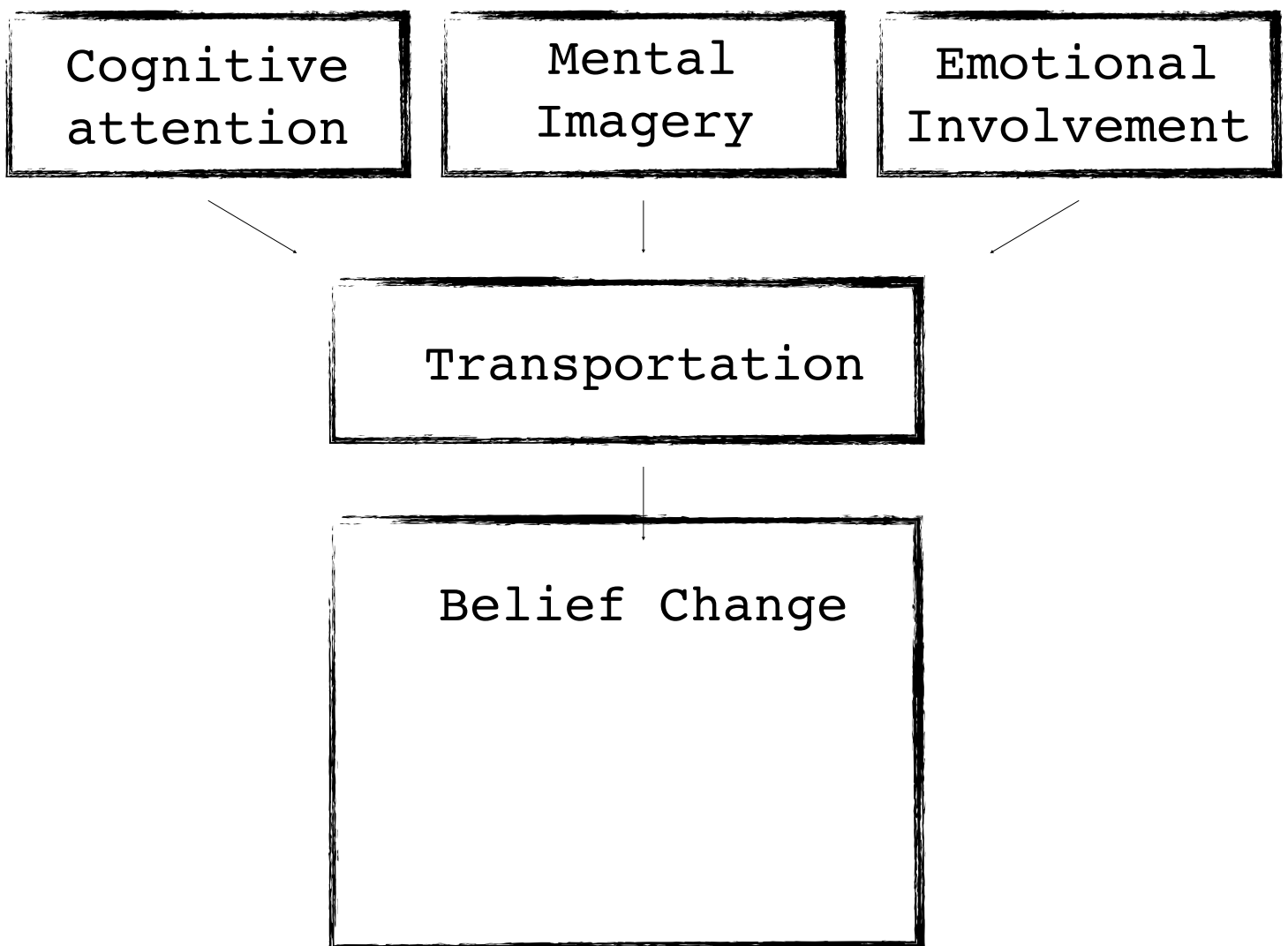
**Figure 3.21** Attention is also driven by contrast

**"You're supposed to get  
in trouble, you're  
supposed to get banned.  
Controversy is great.  
This is advertising. It  
Isn't for shy people.**

**If you want to be  
boring, go and fucking  
collect stamps"**

**– Dave Trott**



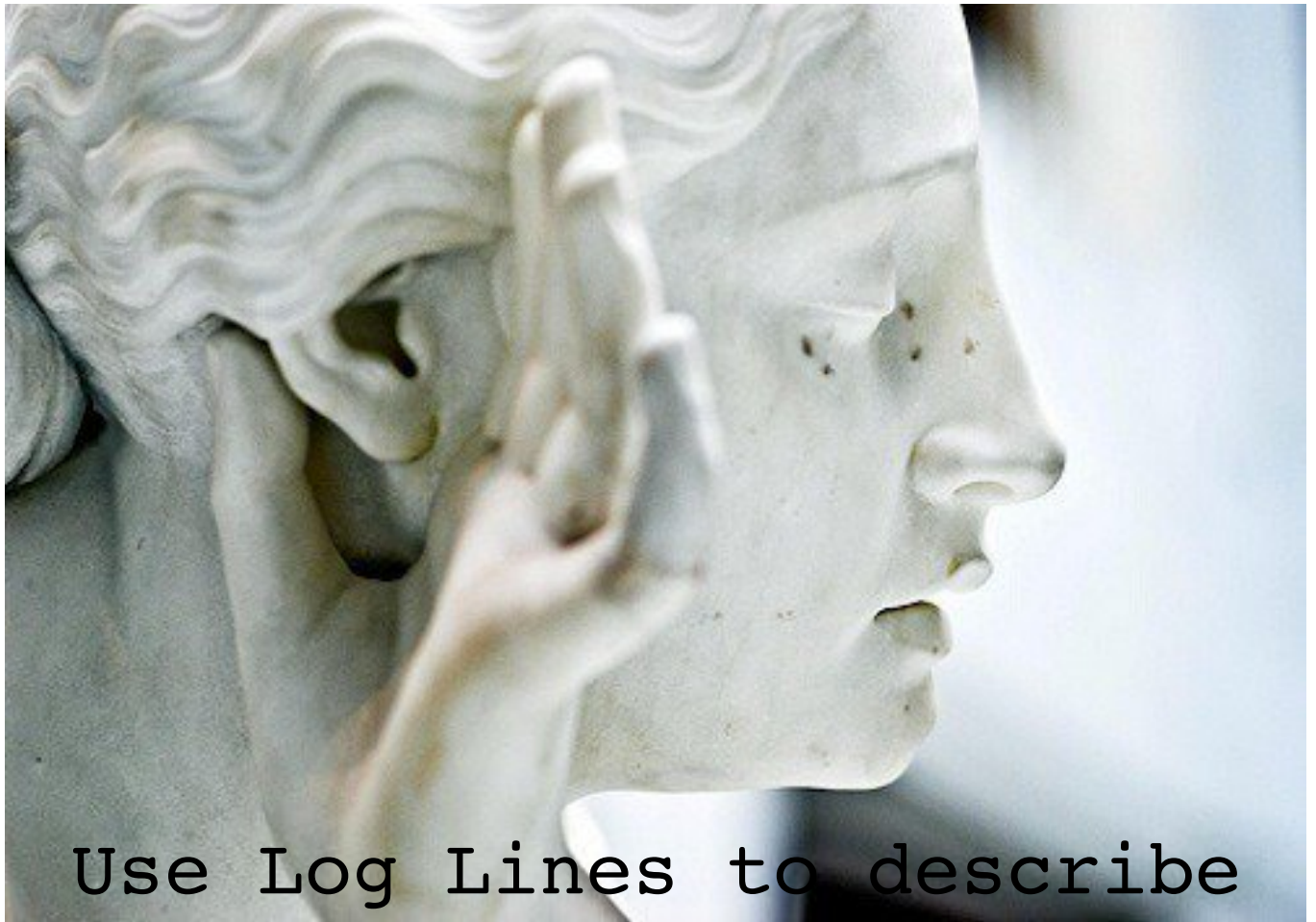




Is it interesting?  
Like, Actually  
Interesting?

[Simplify & De-clutter the message]

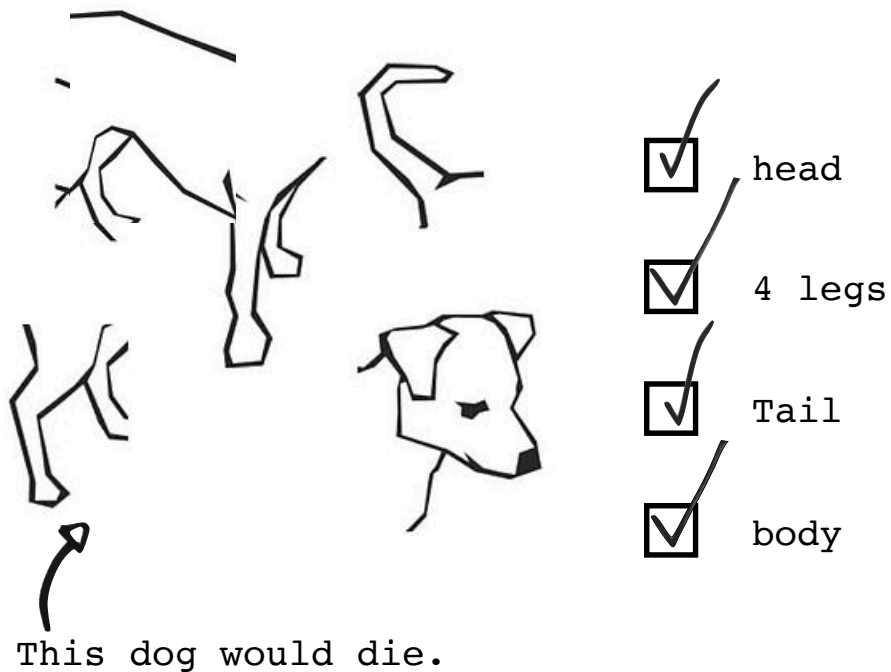
One message,  
beautifully presented



Use Log Lines to describe  
the idea simply

Once you've checked all the boxes, go back and make sure it makes sense as a whole..

If you simply course correct for each individual piece of feedback, you'll look up eventually and realize you're somewhere entirely different than where you meant to be.





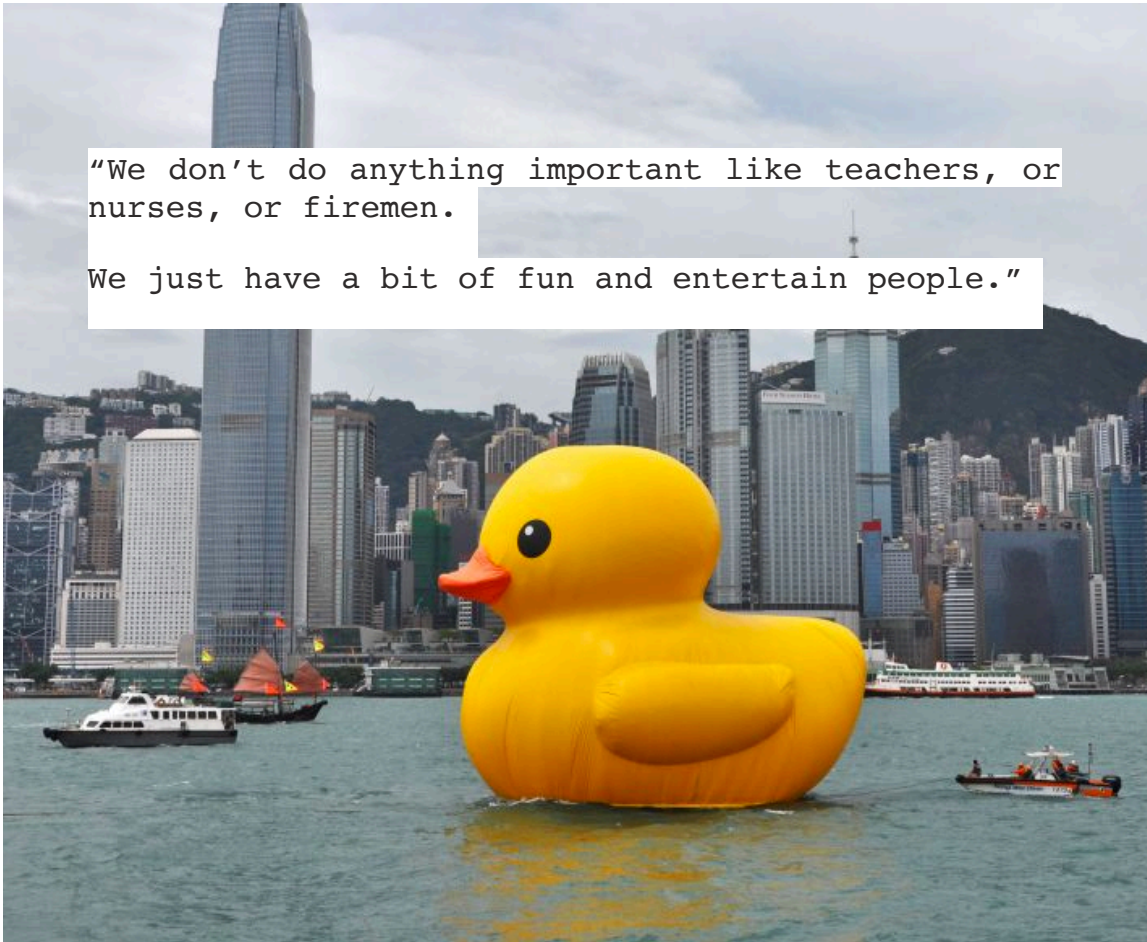
Keep in mind:

People can't agree with a great thought before it's done. Because, if it's a great thought, it breaks the rules.





it's our job to excite people,  
not to try to herd them.



"We don't do anything important like teachers, or nurses, or firemen.

We just have a bit of fun and entertain people."


We can be outrageous to a purpose.  
That is great advertising.

An ad should feel like an unexpected reward

**"Real is good.  
Interesting is better."**

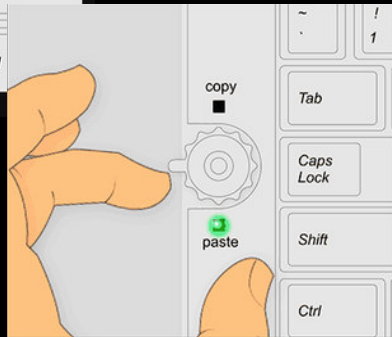
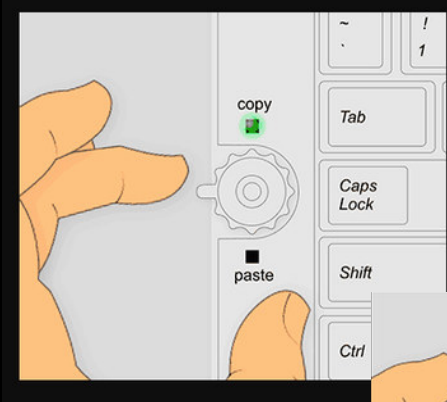
**-Stanley Kubrick**





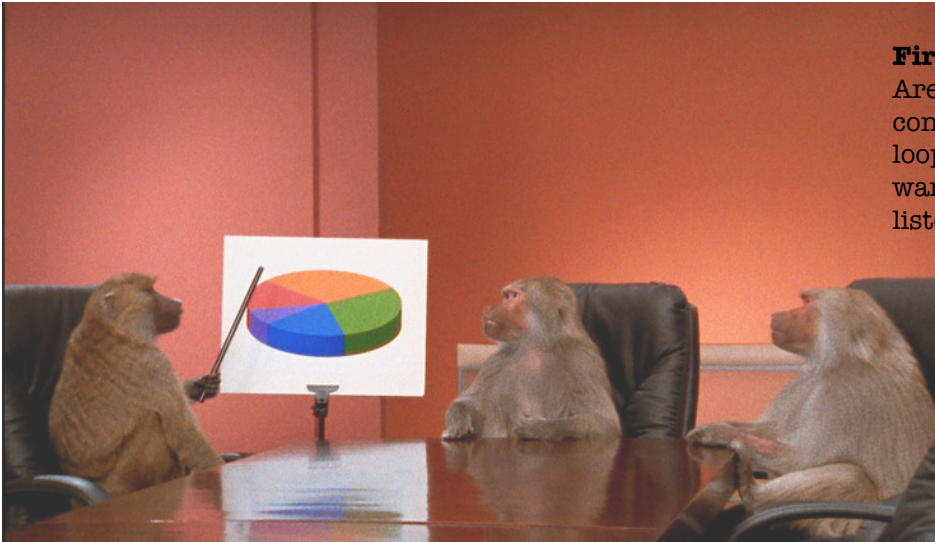
In a world of attention, the  
cardinal sin is **DULLNESS**





## 5. Templates

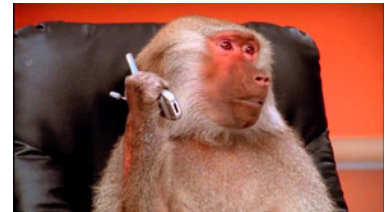
# FRAMEWORKS FOR CREATING PRESENTATIONS



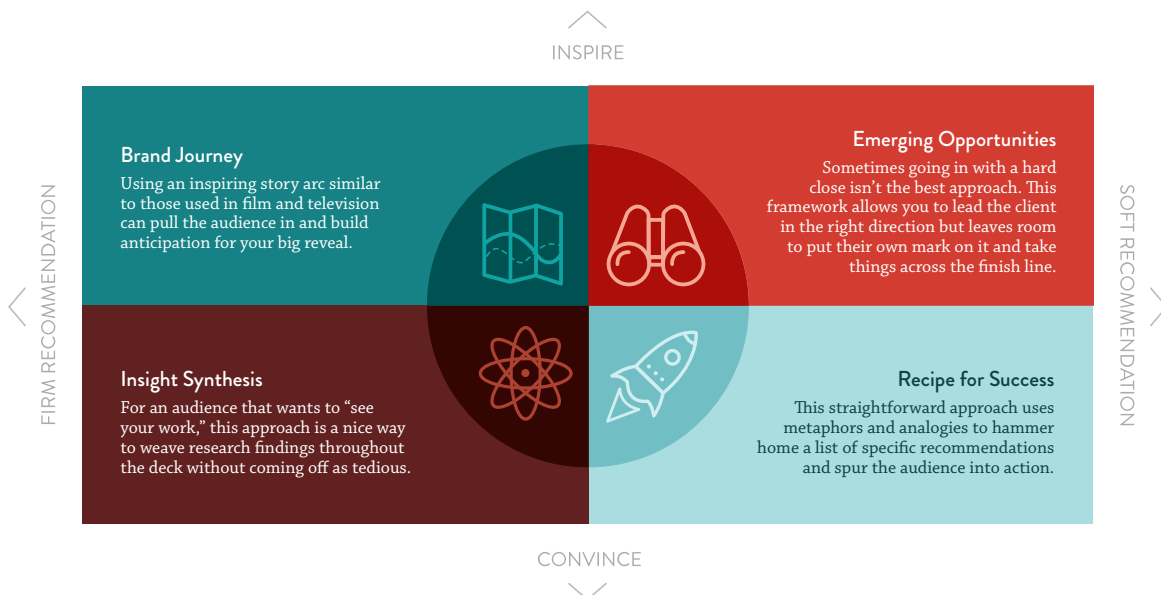
**First, consider your objectives.** Are they about sparking further conversation or to closing the loop? (In other words, do you want to inspire or convince your listeners?)

Using the guide below as a starting place, determine which quadrant provides the best home for your presentation. (Keep in mind that focusing on one of these typologies will lead to a more powerful message, whereas trying to blend them will likely muddy the waters.)

**Next, think about how you want the information to be processed.** Do you want to lead people down a particular narrative path or to let them choose their own adventure? (Said another way, are your recommendations firm or soft?)

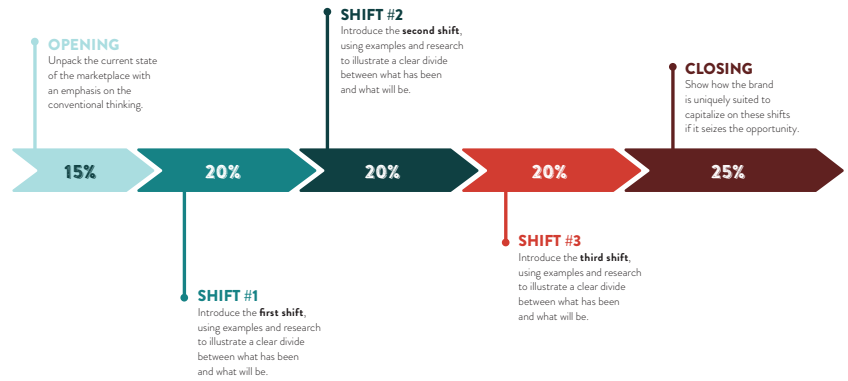


## FOUR PRESENTATION FRAMEWORKS:



The **Emerging Opportunities** framework is a way to highlight major shifts in the marketplace. Typically, these shifts could be cultural trends, changes in consumer attitudes and motivations, or evolutions happening within the category.

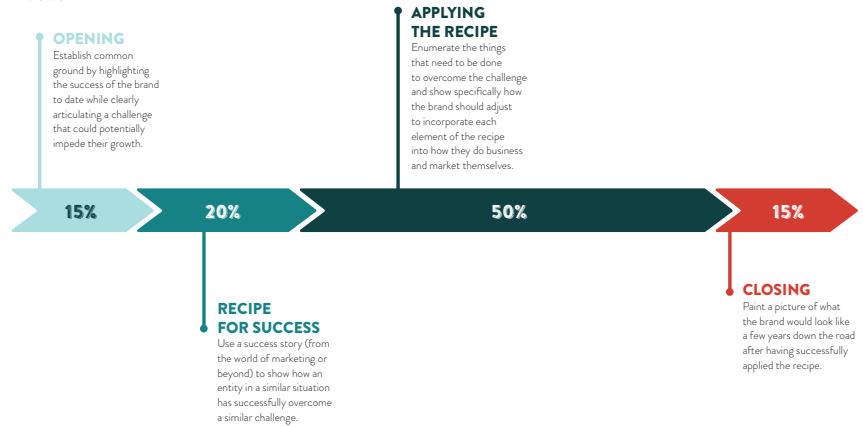
For illustration purposes, the outline below shows how to pace a presentation that includes three shifts, but it's okay to include more.



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The **Recipe for Success** framework uses a metaphor or analogy to establish the conditions for success.

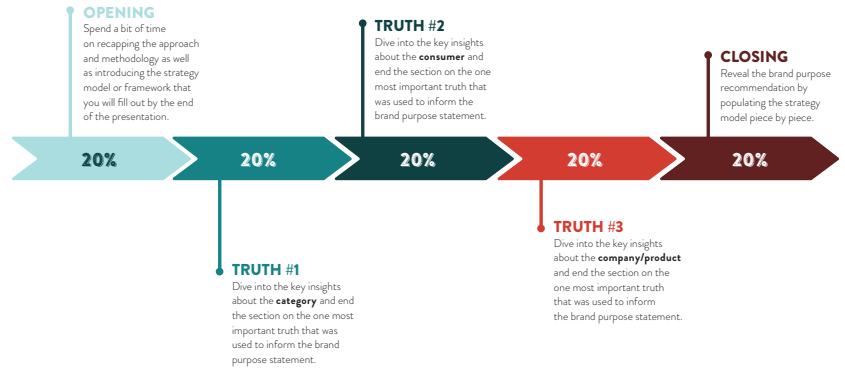
Once those conditions have been articulated, the remainder of the presentation is used to show how the brand can be successful if they pull the appropriate levers.



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The **Insight Synthesis** framework uses key truths to lay out your case in a logical, linear manner.

Usually, this framework has a section that focuses on the most important consumer truth, cultural truth, and company/product truth and weaves those all together in a way that sets up the final brand purpose recommendation.



The **Brand Journey** framework is a way to highlight tensions by juxtaposing challenges and opportunities until the brand purpose recommendation creates a final resolution.

While research should definitely be woven throughout the presentation, this approach feels more like an inspiring story than a detailed report.



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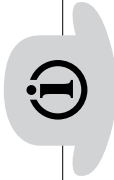
**There are two ways of using the Thinking Hats:**

1. Everyone 'wears' the same hat at the same time. choose one of the hats and ask everyone to contribute to the discussion from that hat's point of view. Each of the six hats is used to discuss an issue.
2. Everyone 'wears' a different hat and the topic is discussed from multiple points of view. all hats need to contribute sufficiently to the discussion. Hats can be switched around during the discussion, forcing people to look at the issue differently.



I want to generate new ideas  
by framing a constructive discussion with my team

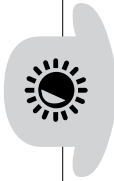
THINKING HATS



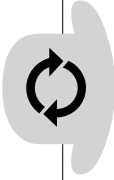
FACTUAL



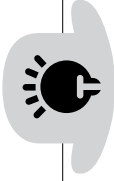
EMOTIONAL



LOGICAL



CAUTIOUS



OUT OF THE BOX

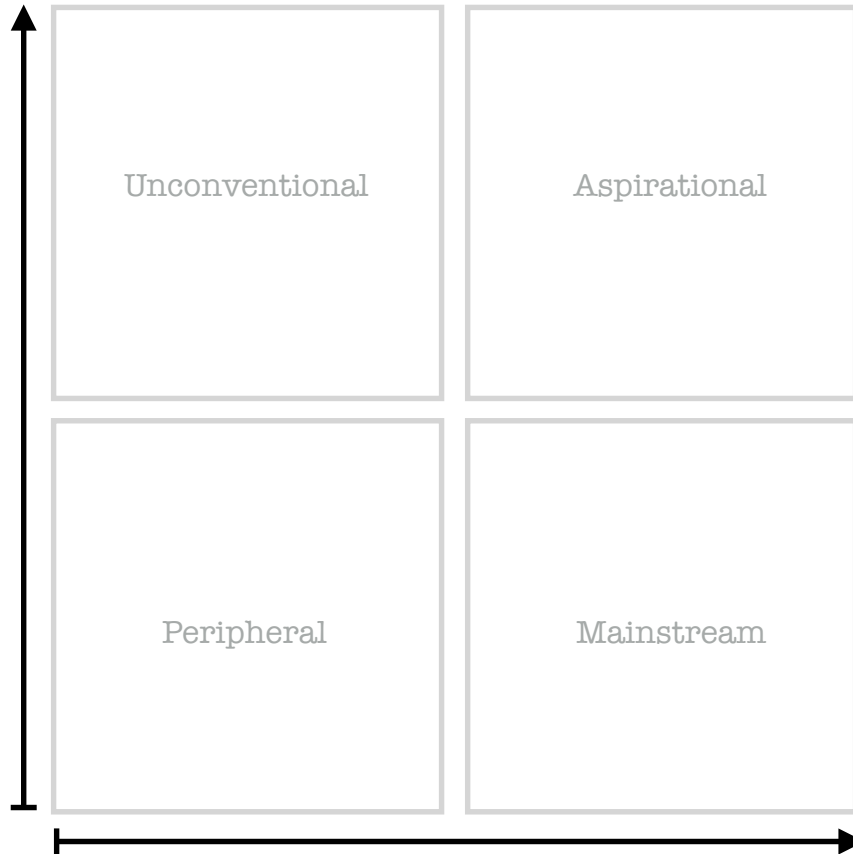


MANAGEMENT

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# Brand Distinction

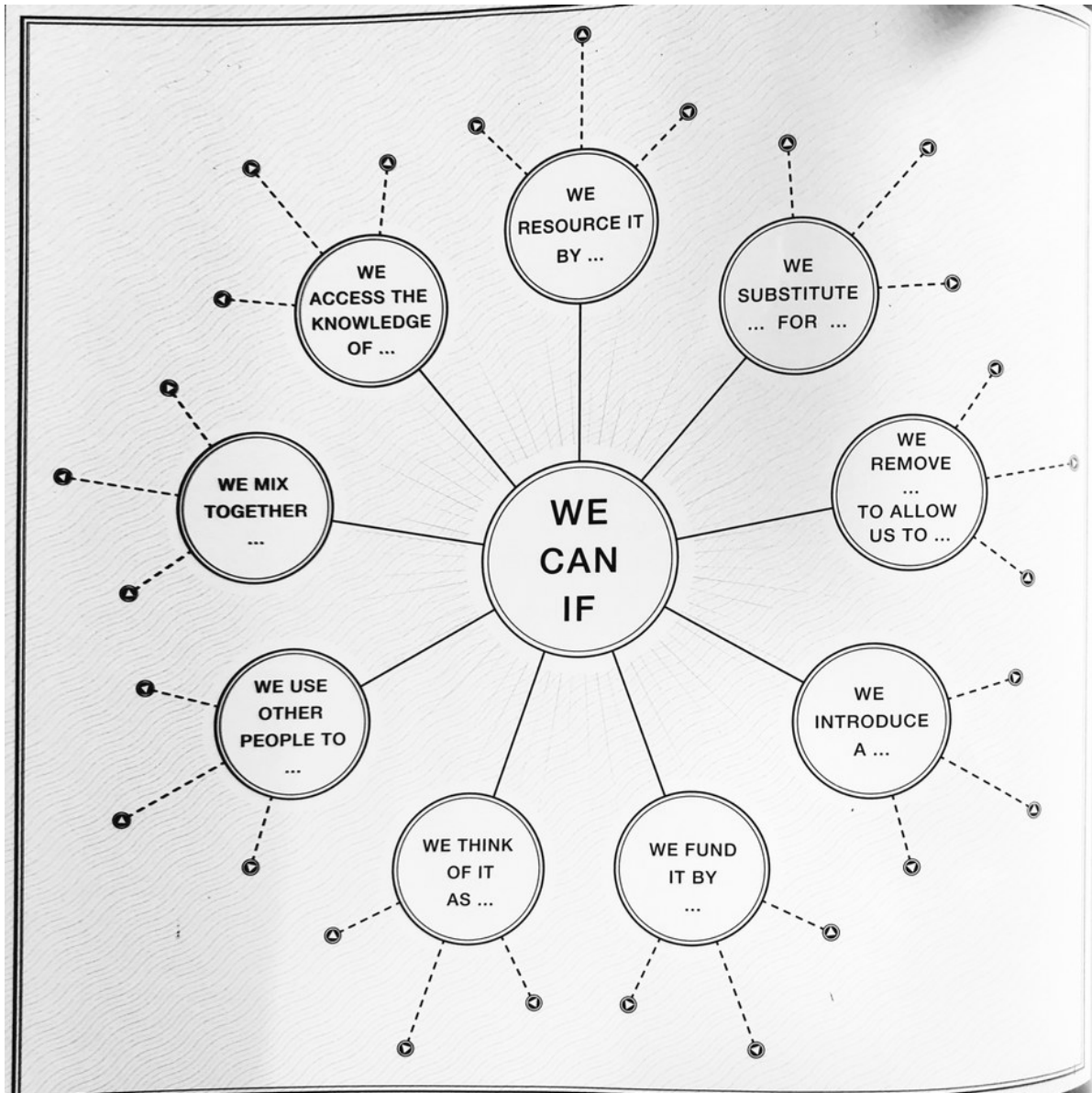
Unique assets, symbols, language and ways of advertising that are unique to your brand



# Brand Centrality

How representative of the category is the brand?





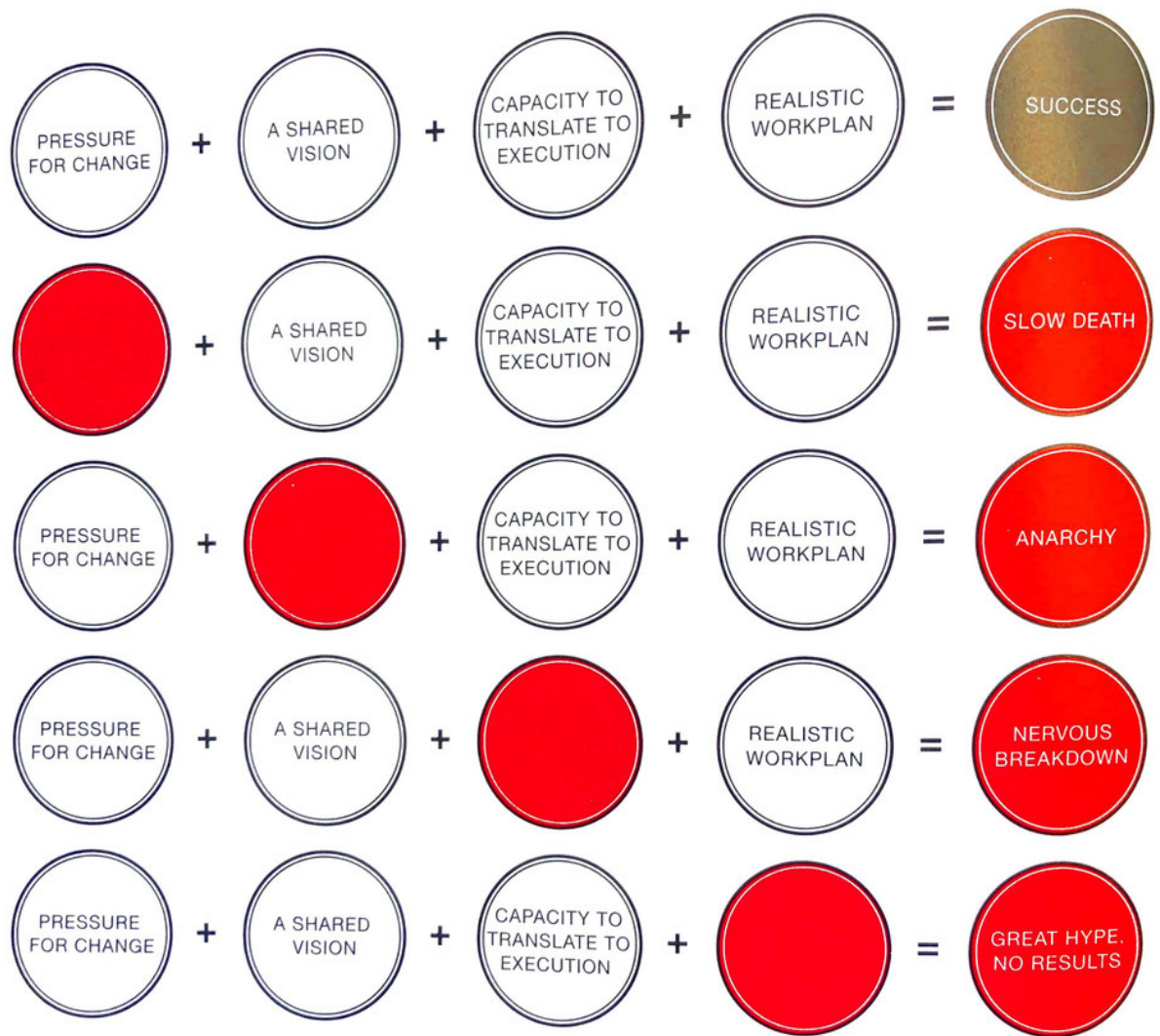


Figure 8: The elements needed for successful change.  
 Source: Strategy&; adapted by Michael Hay<sup>17</sup>

# THE IDEA CHARTER

## PURPOSE

A template for internal idea presentation and a set of strategic filters tailored to every brief

## WHAT IS IT?

This is a template for how all creative ideas should initially be mocked up and presented for internal review. It gives creatives strategic lines to color in and includes questions to avoid common pitfalls.

## WHAT'S INSIDE

Clip slide

**The Name:** A pithy name that captures the essence of the idea and the imagination

**140-Character Description:** if you can't describe the idea in a Tweet how will anyone else?

**Low Fidelity Comps/Keyframes:** Visuals which detail the experience

**PR Headline:** What will the press say about this concept? Is it a first of any kind?

**Spreadability:** Tell a quick story of how this will find itself in front of someone that cares, why they share it, and what they do next



# THE BRIEF

Assignment

Purpose

The Situation:

The Target:

Your Ammo:

Timing and Mandatories:

Leverage Points:

Insights:

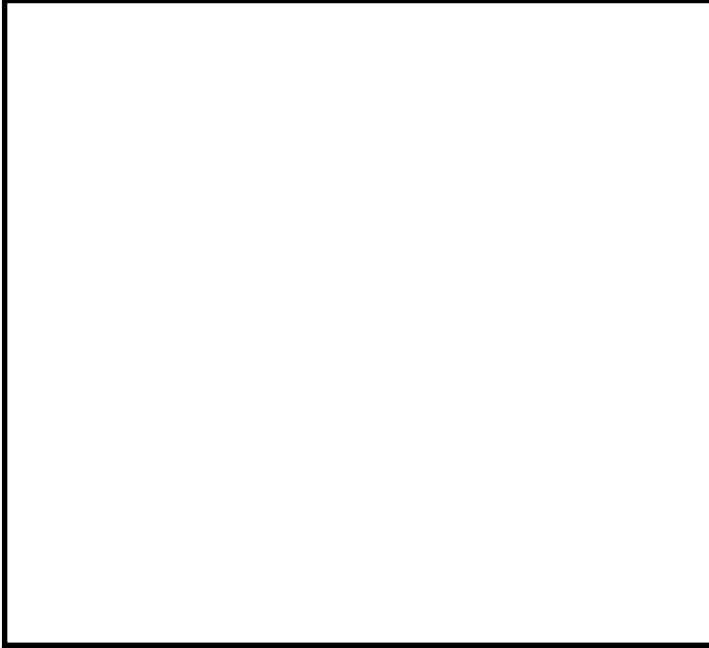
Inspiration:

# PROJECT OVERVIEW

Client name and Project: \_\_\_\_\_

## 1. CLIENT'S PURPOSE

It's why they're on the planet. What would they sell if their product didn't exist?



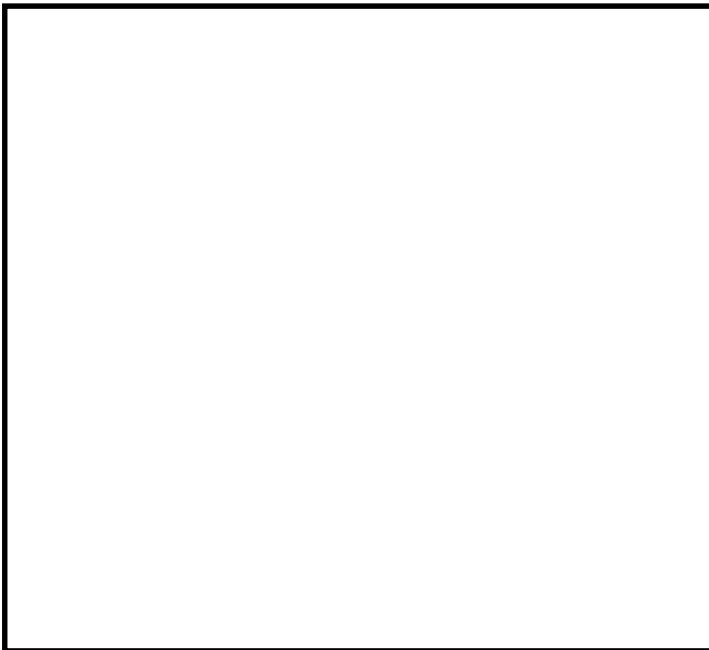
## 2. TARGET OPPORTUNITY

Brief description of who we need to talk with – not necessarily who the target is now / who is using the product



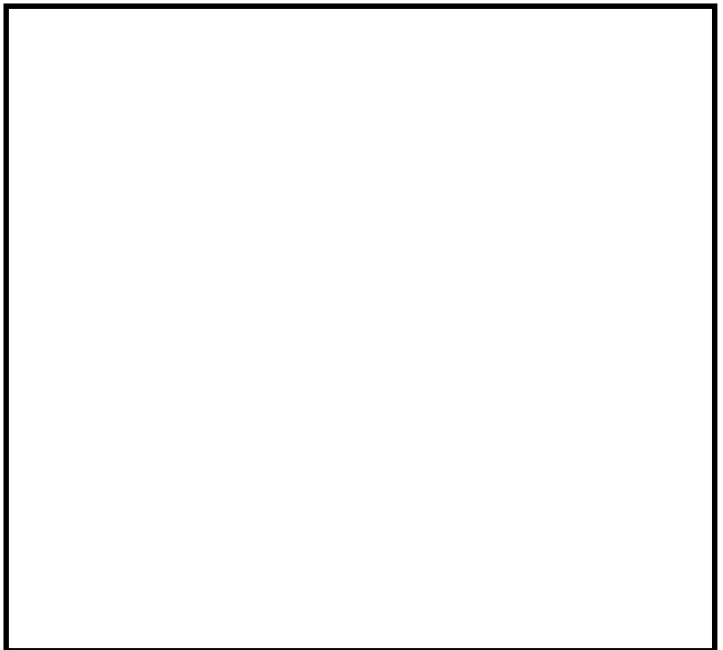
## 3. WHAT'S NEW

It may be a product or service, it may be that the competitive or cultural landscape has changed



## 4. PROBLEM BEING SOLVED

What is the brand's big issue? How can communications help? (be realistic)

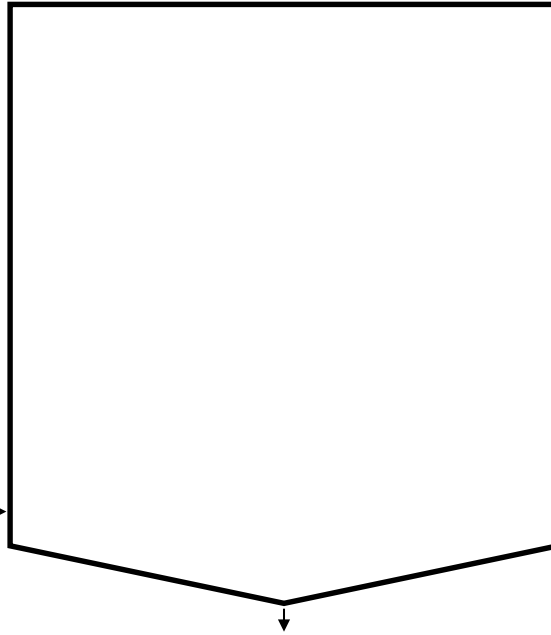


# PROJECT OVERVIEW

Client name and Project: \_\_\_\_\_

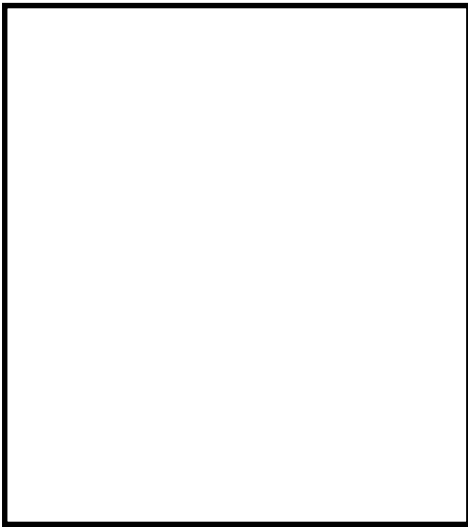
## CULTURAL INSIGHT

What human emotion/unspoken cultural truth will make the catalyst relevant & potent?



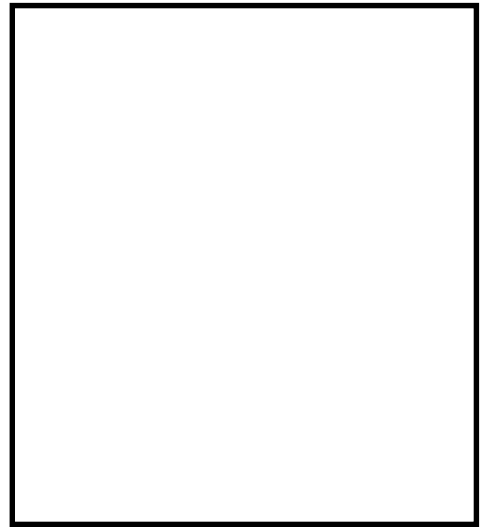
## CURRENT STATE

What does our target think now?



## END STATE

What do we want them to think or do?



## BIG IDEA

What's the catalyst that will change their mind?



## JOURNEY MAP

Purpose: To see things as real people experience them, rather than as we've been told they are through a corporate understanding of the world.

1. Map consumer experience with the category
2. Map how the consumer is giving the consumer things
3. Map the white spaces, pain points, and vernal opportunities

CUSTOMER JOURNEY MAP TEMPLATE

PROCESS	Pre-Service	Event Time	Event Time	Event Time	Event Time	Event Time
CUSTOMER GOALS						
TOUCHPOINTS & EMOTIONAL RESPONSE						
CUSTOMER THOUGHTS						
OVERALL CUSTOMER EXPERIENCE						
Recommendations						
IDEAS TO IMPROVE						

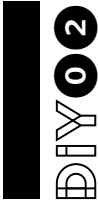
7:

# JOURNEY MAP

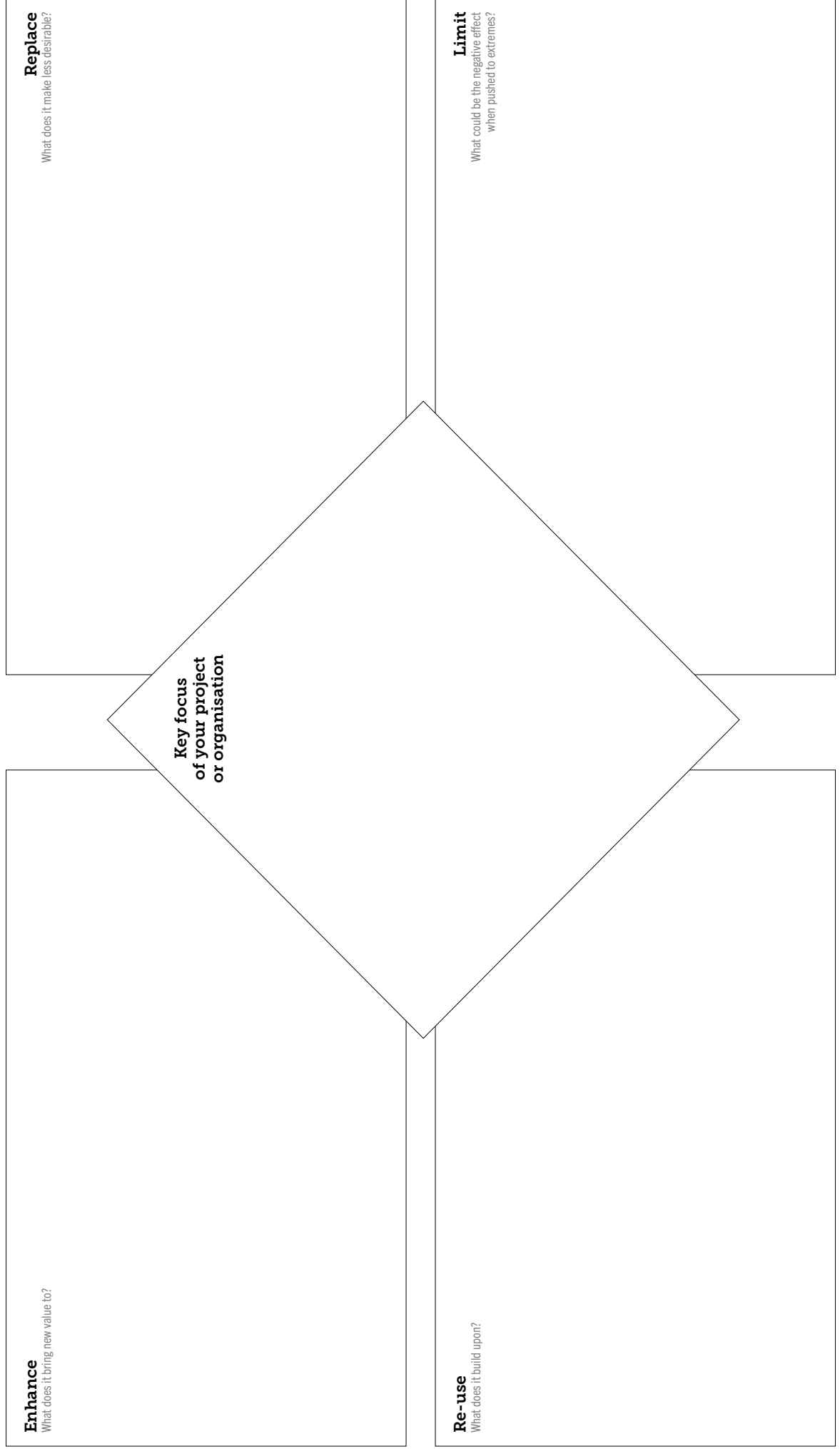
## CUSTOMER JOURNEY MAP TEMPLATE

PROCESS	Pre-Service	Event Time	Event Time	Event Time	Event Time	Event Time
CUSTOMER GOALS						
TOUCHPOINTS & EMOTIONAL RESPONSE						
CUSTOMER THOUGHTS						
OVERALL CUSTOMER EXPERIENCE						
Recommendations						
IDEAS TO IMPROVE						

I want to look ahead  
by defining the outcomes from my work

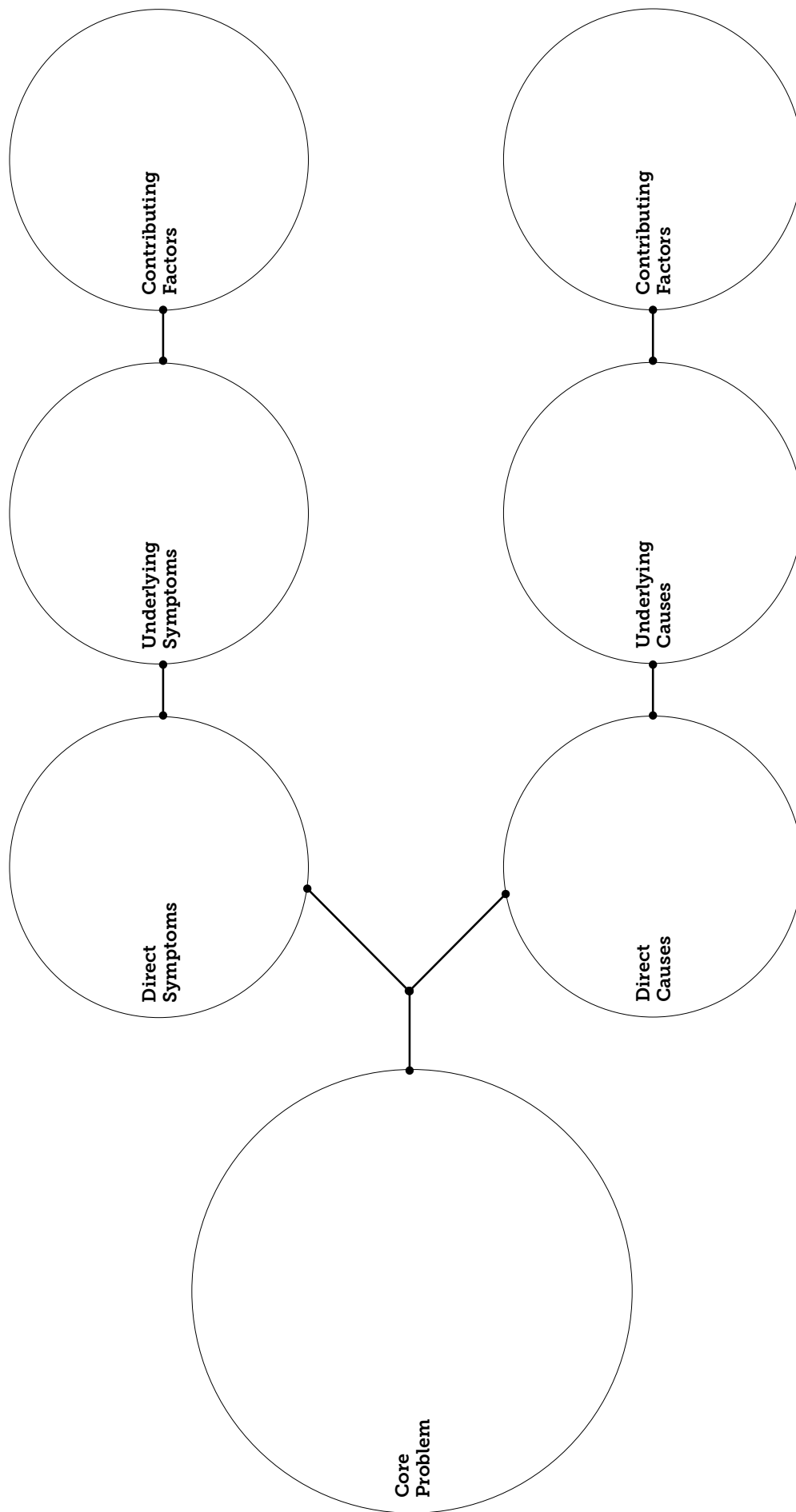


## EVIDENCE PLANNING



I want to clarify my priorities  
by **breaking down a complex issue**

## CAUSES DIAGRAM



I want to clarify my priorities  
by focusing on key critical issues

## PROBLEM DEFINITION

What is the key issue you are trying to address and why is it important?

Who is it a problem for?

What social/cultural factors shape this problem?

What evidence do you have that this is worth the investment?

Can you think of this problem in a different way?  
Can you reframe it?



I want to collect input from others  
in a conversation that uncovers their perspective

## INTERVIEW GUIDE

<p><b>Show me</b> If you are in the interviewee's environment, ask him or her to show you the things they interact with (objects, spaces, tools, etc.). Capture pictures and notes to jog your memory later. Or, have them walk you through the process.</p>	<p><b>Draw it</b> Ask participants to map out their activities and experiences through sketches and diagrams. This is a good way to debunk assumptions and reveal how people perceive and order their activities.</p>
<p><b>Think aloud</b> As they perform a process or task, ask participants to describe aloud what they are thinking. This helps uncover their motivations, concerns, perceptions and reasoning.</p>	<p><b>Be specific</b> People often generalise about what's typical and leave out rich important details. Instead, ask people to talk about a specific period of time. Instead of what's your typical day like, ask them what happened yesterday.</p>

# What is it & why should I do it?

How do you know the right question to ask? Sometimes reaching the right answer means thinking more about the kind of questions you're asking. It might sound simple, but focusing on what you're asking someone is essential for reaching a deeper understanding. The **Question Ladder** is an interview technique that helps you to hone in on a certain topic by asking a series of questions about different aspects related to that topic.

This tool is a quick and easy way to start asking your questions in a few different ways, and to start combining questions in order to reach more complex answers. It provides a structured overview of what goes into a question; it shows how to combine a range of who, what, where, when, why and how questions coupled with the words like is, did, can, will, would and might. This makes it much easier to think about the best way to get to the heart of the issue at hand, and to build chains of questions that will allow you to gradually reach the heart of more complex issues.

## HOW TO USE IT

While making a questionnaire or before going for an interview, this worksheet can be used as a series of possible questions from which a final set can be chosen. Use this to practice approaching and exploring an issue through various directions.

Once you have gained some experience with using this technique, you might find yourself automatically using it in conversations or interviews you conduct with people.

	Is	Did	Can	Will	Would	Might
Who	Who is	Who did	Who can	Who will	Who would	Who might
What	What is	What did	What can	What will	What would	What might
Where	Where is	Where did	Where can	Where will	Where would	Where might
When	When is	When did	When can	When will	When would	When might
Why	Why is	Why did	Why can	Why will	Why would	Why might
How	How is	How did	How can	How will	How would	How might

I want to collect input from others  
by getting to the heart of what motivates people

QUESTION LADDER

	← SIMPLE QUESTIONS			→ COMPLEX QUESTIONS		
	Is	Did	Can	Will	Would	Might
Who	Who is	Who did	Who can	Who will	Who would	Who might
What	What is	What did	What can	What will	What would	What might
Where	Where is	Where did	Where can	Where will	Where would	Where might
When	When is	When did	When can	When will	When would	When might
Why	Why is	Why did	Why can	Why will	Why would	Why might
How	How is	How did	How can	How will	How would	How might

# What is it & why should I do it?










This tool allows a team to generate ideas by looking at a problem or opportunity from a range of perspectives. This helps come up with new ideas for potential solutions, and also strengthens current offerings, as it challenges it from different approaches. Comprised of seven approaches, or challenges, you can choose the ones that seem most applicable to take the topic at hand further, thus using the tool to inspire further discussions.

The **Fast Idea Generator** helps frame ideas, problems or opportunities in relation to different scenarios. It stretches the thinking around a concept in different directions, providing a stimulating discussion that will further strengthen the concept. To use the tool effectively, the starting point (problem, opportunity, concept idea or existing proposition) should be clearly laid out.

## ? HOW TO USE IT

**Step 1** is to start from an existing concept, problem or opportunity and then apply the seven challenges suggested in the worksheet. These are simple steps to help come up with alternatives that bend, break and stretch the 'normal rules' in such a way that you can generate many surprising ideas in a short period of time.

**Step 2** is then to review the ideas and select the best ones to further flesh them out into workable innovations.

THE APPROACH	THE NORMAL RULE	BENDING, BREAKING & STRETCHING THE RULE
 Inversion	Turn common practice upside down	
 Integration	Integrate the offer with other offers	
 Extension	Extend the offer	
 Differentiation	Segment the offer	
 Addition	Add a new element	
 Subtraction	Take something away	
 Translation	Translate a practice associated with another field	
 Grafting	Graft on an element of practice from another field	
 Exaggeration	Push something to its most extreme expression	

I want to generate new ideas  
by thinking differently

THE APPROACH		THE NORMAL RULE		BENDING, BREAKING & STRETCHING THE RULE	
	<b>Inversion</b>	Turn common practice upside down	Doctors treat patients	What if patients became doctors?	
	<b>Integration</b>	Integrate the offer with other offers	People access a range of services in different locations	What if different local services had one point of access?	
	<b>Extension</b>	Extend the offer	Schools provide learning opportunities to children and young people during the day	What if schools also offered sport and recreation; and community learning after hours?	
	<b>Differentiation</b>	Segment the offer	There is a 'one size fits all' approach	What if a service was personalised and differently segmented?	
	<b>Addition</b>	Add a new element	Supermarkets deliver groceries	What if supermarkets delivered groceries and also provided hot meals to older people in their homes?	
	<b>Subtraction</b>	Take something away	Prisons are critical to an effective criminal justice system	What if you had to close three prisons?	
	<b>Translation</b>	Translate a practice associated with another field	Hospitals and airports are different kinds of operations	What if airport management practices were applied to hospitals?	
	<b>Grafting</b>	Graft on an element of practice from another field	Teaching and coaching are separate practices	What if coaching was introduced as part of secondary school education?	
	<b>Exaggeration</b>	Push something to its most extreme expression	Schools support children and young people to learn, but only within designated times and in a designated space	What if students could access learning, anytime and anywhere they chose?	



5. Blank pages to be filled in  
with whatever

























You got this.







*There's a simple doctrine:  
Outside of a person's love, the most sacred  
thing that they can give is their labour."*