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50 Business Diagrams for Strategic Planning

Brainstorming

Documentation

Meeting

Project Management

Research & Analysis

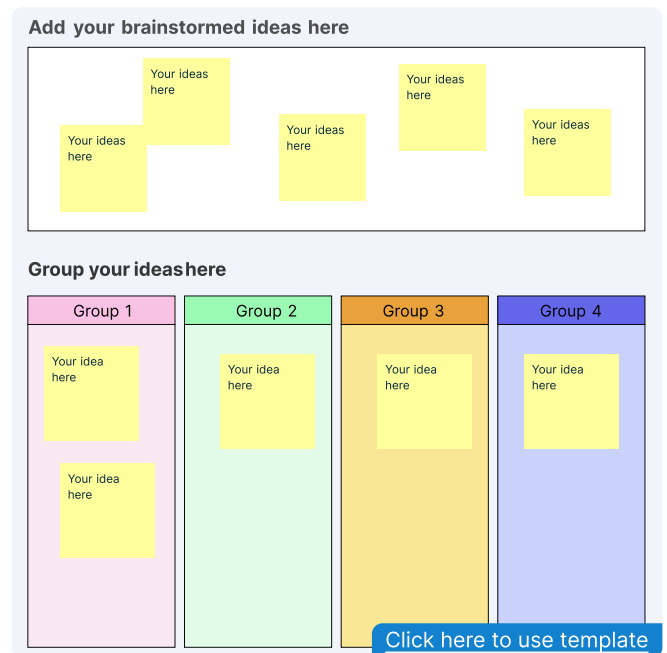# Strategy & Planning

Strategy & Planning

Task Management
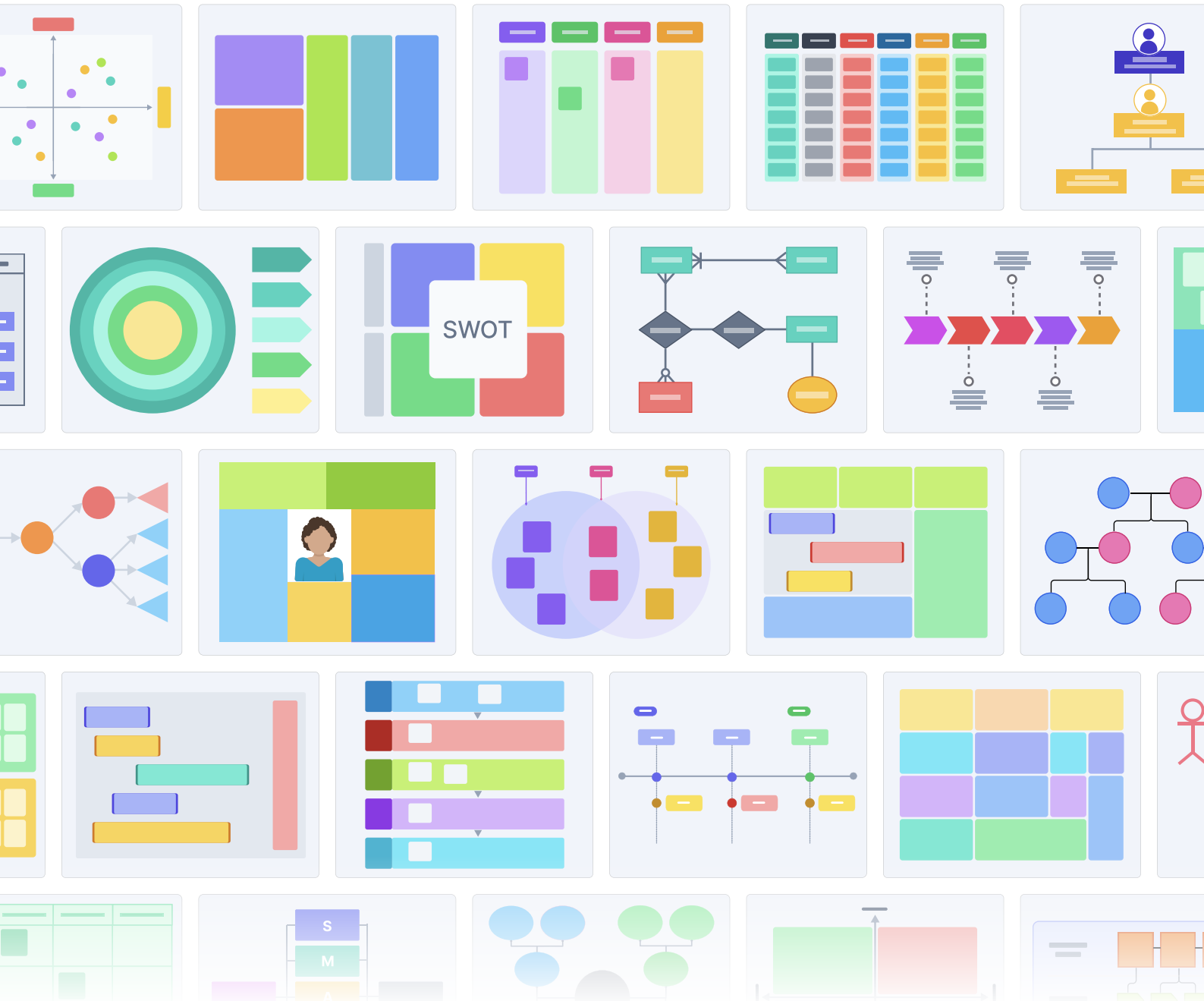
Brainstorming

Affinity Diagram

An affinity diagram is a visual tool used for organizing ideas or information generated during brainstorming sessions. It helps teams make sense of large amounts of unstructured information by grouping related ideas together and identifying patterns and themes.

When to Use ⤵

- Grouping and categorizing ideas.
- Making sense of complex information.
- Generating insights from a brainstorming session.
- Resolving issues collaboratively.
- Organizing unstructured data.
- Improving processes through team input.

Add your brainstormed ideas here

Your ideas here
Your ideas here
Your ideas here
Your ideas here
Your ideas here
Your ideas here

Group your ideas here

Group 1	Group 2	Group 3	Group 4
Your idea here	Your idea here	Your idea here	Your idea here
Your idea here			

Click here to use template

How to Use ⤵

1. Gather ideas: Write down ideas or opinions related to a specific topic or problem on separate cards or sticky notes.
2. Sort similar ones: Stick the notes on a board, moving similar ones close to each other.
3. Label groups: Write a descriptive label or heading for each group that captures the overarching theme that ties those ideas together.
4. Analyze and refine: Analyze the relationships and patterns that emerge.
5. Discuss and prioritize: Discuss about the identified groups and their contents to develop strategies, solutions, or action plans based on them.

Creately Resources

⤵ Affinity Diagram Tool   ⤵ Guide to Affinity Diagrams   ⤵ Affinity Diagram Templates

Decision Tree

A decision tree template is a visual aid that helps you make decisions by breaking down a complex problem into smaller, more manageable steps. The template typically consists of a central node, which represents the main decision to be made, and branches that represent the possible outcomes of that decision. Each branch can then have its own sub-branches, representing the possible outcomes of the next decision, and so on.

When to Use ⊠

- Evaluating possible outcomes and their probabilities.
- Quantifying risks and rewards.
- Structuring decision-making logically.
- Analyzing trade-offs and uncertainties.
- Communicating decision paths visually.

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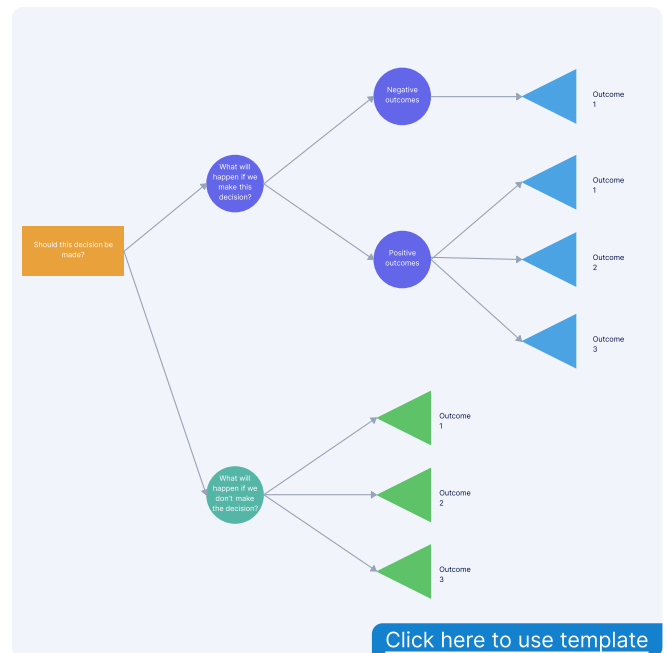
How to Use ⊠

1. Clearly outline the decision you need to make. Is it a business strategy, project path, or personal choice? It helps to lay the foundation for an effective decision-making process.

2. List the viable options at hand. These are the potential branches of your decision tree, representing different pathways to consider.

3. For each option, assess the potential outcomes and consequences. Use data, research, and expert insights to weigh the pros and cons, allowing you to make an informed choice.

4. Once you've evaluated all options, follow the branches to their logical conclusions. The Decision Tree Template will lead you to the optimal choice, backed by an analysis of potential outcomes.

Creately Resources

⊠ 13 Decision-Making Techniques and Tools for Business

⊠ Decision Tree Examples

Mind Map

A mind map is a visual representation of information that helps organize thoughts, ideas, concepts, or tasks around a central topic or theme. It typically starts with a central idea or keyword, which branches out into related subtopics, creating a tree-like structure. Each subtopic can further branch out into more specific details. Mind maps use keywords, images, colors, and connections to create a visually engaging overview of information.
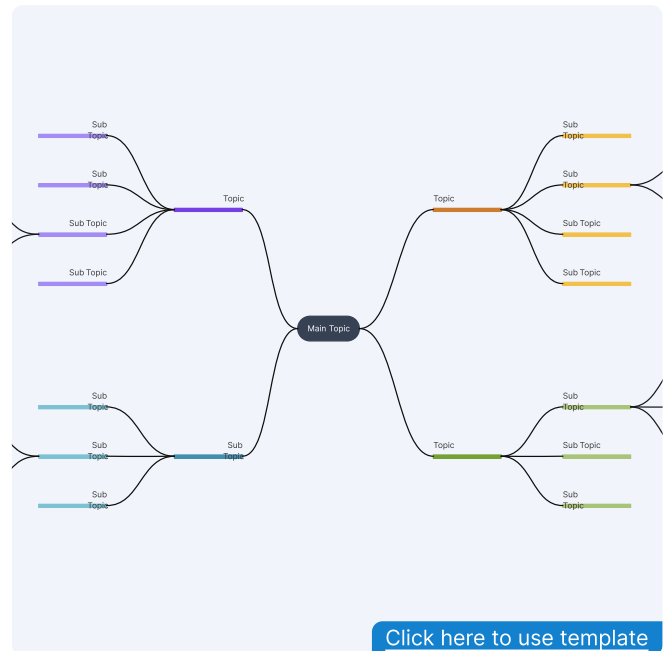
When to Use ⬇

- Brainstorming creatively.
- Planning projects or tasks.
- Visualizing relationships.
- Taking structured notes.
- Problem-solving collaboratively.

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How to Use ⬇

1. Central idea: Start with a central keyword or topic in the middle of the page.

2. Branches: Create main branches radiating from the central idea, each representing a key subtopic or category.

3. Sub-branches: From each main branch, add smaller branches for more specific details or ideas related to the subtopic.

4. Keywords and images: Use concise keywords and images on each branch to represent concepts. Keep text short and visual.

5. Hierarchy: Arrange branches in a hierarchical manner, with main topics closer to the center and subtopics farther out.

6. Connections: Draw lines or arrows to show connections between related branches, indicating relationships or dependencies.

Creately Resources

⬇ Mind Mapping Software

⬇ How to Use Mind Maps for Perfect Elevator Pitch

⬇ How Mind Maps Increase Productivity & Save Time

⬇ Mind Map Examples

⬇ Use Mind Maps Effectively in a Meeting

⬇ Mind Maps for Business Thinking

SCAMPER Template

The SCAMPER template is a brainstorming tool that allows you to generate ideas and transform them into tangible solutions. Each letter in the acronym prompts a specific angle for idea generation:

- **Substitute:** Identify elements that can be replaced to enhance the concept.
- **Combine:** Fuse different ideas to create something entirely new and exciting.
- **Adapt:** Modify aspects to suit a different context or purpose.
- **Modify:** Alter and refine components to boost functionality and appeal.
- **Put to Another Use:** Imagine alternate applications for existing concepts.
- **Eliminate:** Trim unnecessary elements to streamline and refine the idea.
- **Reverse/Rearrange:** Flip perspectives and arrangements for fresh insights.
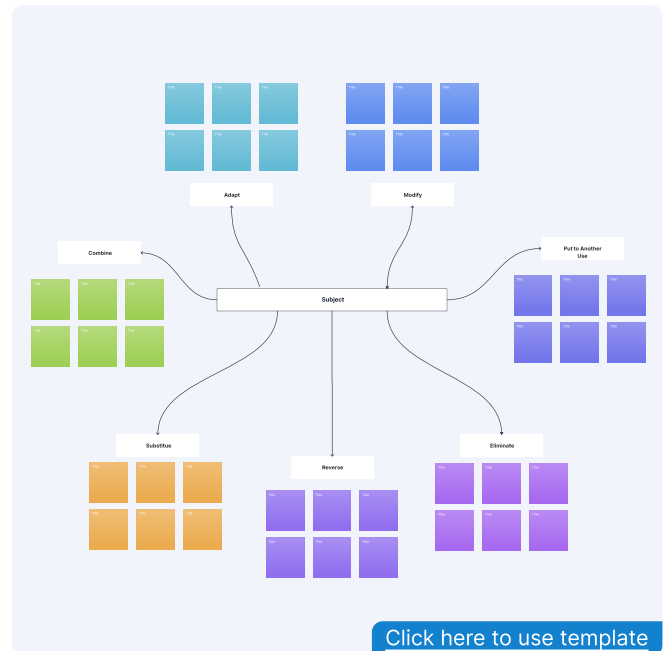
When to Use ⤵

- Generating new ideas or solutions.
- Overcoming creative blocks.
- Innovating existing concepts.
- Reframing problems for fresh perspectives.
- Enhancing products or processes.

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Creately Resources

- ↘ [The Ultimate List of Visual Creative Thinking Techniques for Your Next Great Idea](#)

- ↘ [The Best Ideation Techniques for Remote Teams](#)

- ↘ [SCAMPER Examples](#)

How to Use ⤵

1. Identify the concept or idea you want to explore. Frame it as a question or challenge.

2. Apply the SCAMPER principles – Substitute, Combine, Adapt, Modify, Put to another use, Eliminate, and Reverse – to dissect your concept. This sparks inventive ideas by prompting you to view them from various angles.

3. Engage with the generated ideas. Identify the most promising ones and refine them further. Combine different SCAMPER techniques for a synergy of creativity.

4. Organize your ideas visually using the SCAMPER Map template. This clear overview of your innovative pathways helps you choose the best direction forward.
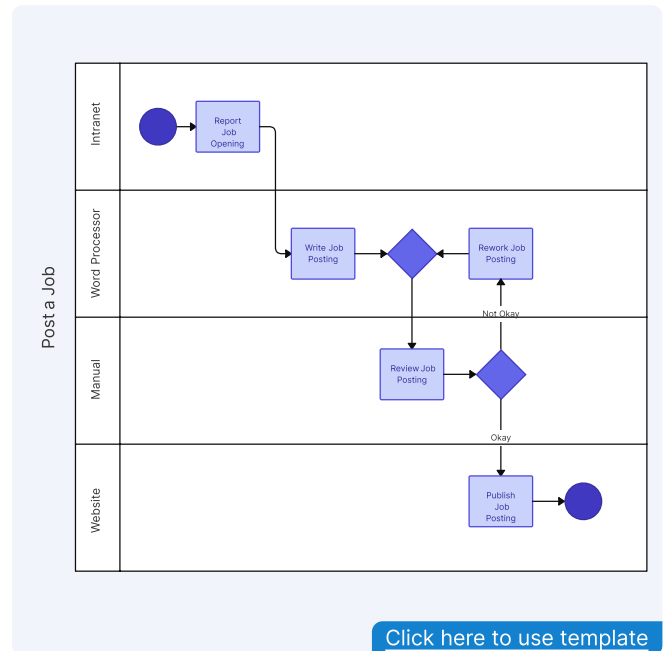
BPMN

Business Process Modeling Notation (BPMN) is a standardized graphical notation used to visualize business processes in a clear and understandable way. It provides a visual representation of various aspects of a business process, including its activities, decisions, events, gateways, and flows, allowing organizations to model, analyze, and communicate their processes effectively.

When to Use ⟱

- Documenting business processes.
- Representing workflow logic.
- Analyzing process efficiency.
- Standardizing process documentation.

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How to Use ⟱

1. Identify the process: Choose the specific business process you want to model.
2. List process steps: Break down the process into individual steps, from start to finish.
3. Draw the BPMN diagram: Using the correct notations, draw the BPMN diagram.
4. Connect symbols: Use arrows to connect the symbols in the sequence they occur.
5. Add information: Inside the symbols, add details like task names, who's responsible, and any important data. This provides clarity and context.
6. Use swimlanes: If different teams or roles are involved, use swimlanes to show responsibilities.

Creately Resources

⟱ BPMN Software

⟱ BPMN Templates to Model Business Processes

⟱ Business Process Modeling Techniques

⟱ 5 Tips to Master Business Process Modeling

⟱ What is Business Process Modeling

⟱ Importance of Business Process Modeling

Employee Journey Map

The employee journey map is a tool that helps visualize an employee's progression within an organization, from hire to exit. It aims to add value to the employee by identifying his/her skills, areas of expertise and improvement to create growth opportunities accordingly. It gives employees a clear picture of what their journey will be like in the company.

When to Use ⤵

- Analyzing employee experiences.
- Visualizing the employee lifecycle.
- Identifying pain points and opportunities.
- Improving employee engagement.
- Mapping touchpoints and interactions.

		Candidacy	Onboarding	Performance	Growth		Exit	Post - Exit
Objective		Find a job	Understand organization, role and goals	Achieve goals, contribute, and receive recognition	Learn, grow and achieve personal satisfaction		Depart organization	Refer and/or return to organization
Employee Experience		Submit resume	Meet and greet	Add text	Add text	Add text	Add text	Add text
		Offer/ rejection	Add text	Add text	Add text	Add text	Add text	Add text
		Interviews	Add text	Add text	Add text		Add text	

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How to Use ⤵

1. Assemble key stakeholders to pool insights, ensuring a holistic perspective.

2. Identify employee personas to empathize with distinct experiences.

3. Plot employee interactions, pain points, and delights within each phase.

4. Continuously refine by analyzing feedback, adapting strategies, and nurturing ongoing improvements.

Creately Resources

⤵ Train and Mentor New Employees Remotely to Build a Productive Workforce

⤵ The Easy Guide to Employee Performance Planning

⤵ A Step By Step Guide to Set KPIs for Team Members

⤵ How to Train Remote Employees | Best Practices and Tools

⤵ Ease the New Employees Onboarding with Editable Onboarding Templates

Organizational Chart

An organizational chart, also known as an org chart or hierarchy chart, is a visual representation of a company's structure that highlights the relationships between different roles, positions, and departments within the organization.

When to Use ⬇

- Showing reporting relationships.
- Communicating team structures.
- Illustrating departmental divisions.
- Understanding roles and positions.
- Onboarding new employees.
- Planning for growth or restructuring.

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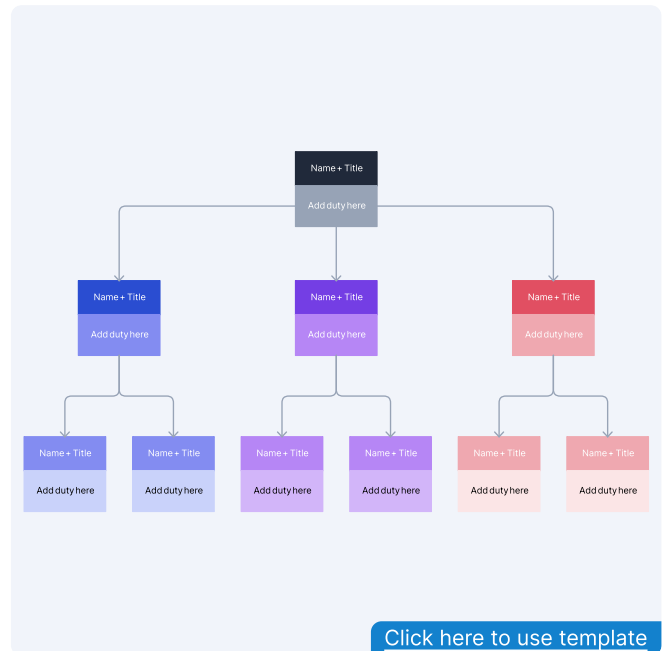
How to Use ⬇

1. Identify roles and departments: List all key roles and departments within the organization, from top-level executives to lower-level positions.

2. Hierarchy arrangement: Determine the hierarchy of positions, including reporting relationships. Place higher-ranking roles at the top and follow down with subordinates..

3. Chart format: Choose a suitable format, such as a hierarchical structure with boxes and lines, for your chart.

4. Add positions: Use boxes for each role and connect them with lines to indicate reporting relationships. Align boxes to show hierarchy levels clearly.

5. Position details: Include job titles, names (if applicable), and a brief description of each role within the boxes.

6. Review and refine: Double-check the chart for accuracy, clarity, and alignment with the organization's structure. Make adjustments as needed, ensuring the chart clearly reflects the current hierarchy and roles.

Creately Resources

⬇ Org Chart Software   ⬇ Org Chart Examples   ⬇ Project Organizational Chart Template

⬇ 7 Types of Organizational Structures for Companies   ⬇ Organizational Chart Best Practices for Meaningful Org Charts   ⬇ Advantages and Disadvantages of Organizational Charts Structures

⬇ Manage your Project better with Organization Charts   ⬇ How Organizational Charts can Help Flat Organizations

Service Blueprint

A service blueprint is a diagram that illustrates the end-to-end customer service experience, along with the internal processes, interactions, and touchpoints that support it. It provides a comprehensive view of how a service is delivered, highlighting the customer's journey, the roles of various stakeholders, and the behind-the-scenes activities required to deliver the service effectively.

When to Use ⬇

- Analyzing service delivery gaps.
- Enhancing service quality and efficiency.
- Enhancing customer experiences.
- Collaborating on service design.
- Designing or improving services.

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How to Use ⬇

1. Define the service: Clearly identify the specific service you want to blueprint, specifying its scope and purpose.

2. Map the customer journey: Outline the steps a customer takes when interacting with the service, including touchpoints and key actions.

3. Identify internal processes: Map out the internal activities and processes that support each customer touchpoint, showing how the service is delivered behind the scenes.

4. Add backstage & support processes: Show the backstage processes, such as employee training, resource allocation, quality control, etc. required to deliver the service.

5. Validate and refine: Share the blueprint with stakeholders, including team members and customer representatives, to ensure its accuracy and gather feedback for refinement.

Creately Resources

⬇ Service Blueprint Template

⬇ What is a Service Blueprint

SIPOC Diagram

A SIPOC diagram is used in business process improvement to outline the high-level components of a process. The acronym SIPOC stands for Suppliers, Inputs, Process, Outputs, and Customers. Each element in the SIPOC diagram provides a clear overview of the process and its relationships to help teams understand and analyze a process in a structured manner.

When to Use ⬊

- Defining process scope.
- Identifying key process elements.
- Communicating process overview.
- Analyzing process components.
- Streamlining process understanding.

SUPPLIER	INPUT	PROCESS	OUTPUT	CUSTOMER
Add textyear	Add textyear	Start	Add textyear	Add textyear
Add textyear	Add textyear	Process	Add textyear	Add textyear
Add textyear	Add textyear	Process	Add textyear	Add textyear
Add textyear	Add textyear	Process	Add textyear	Add textyear
Add textyear	Add textyear	Start		

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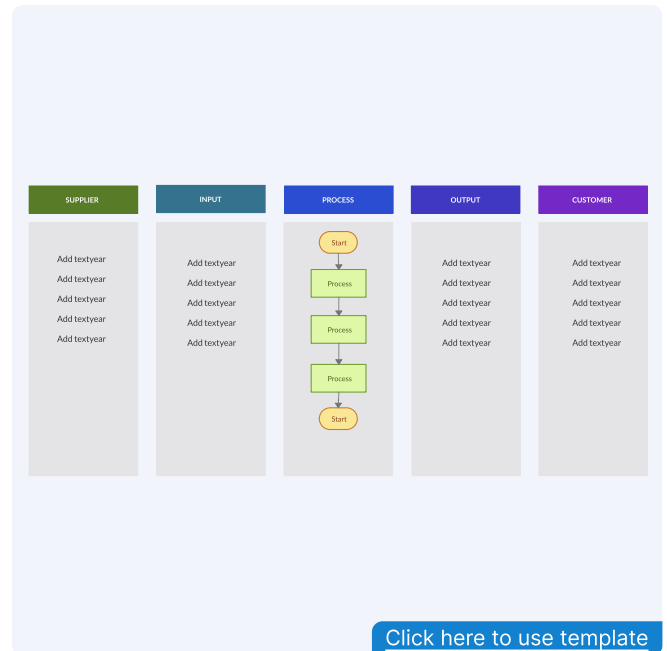
How to Use ⬊

① Define the process: Choose the specific process you want to map.

② Identify suppliers: List the entities or sources that provide essential inputs or resources to initiate the process.

③ List inputs: Specify the materials, information, or resources required from the suppliers to start and execute the process.

④ Outline the process: Define the key steps involved in the process, highlighting the sequence of actions.

⑤ List outputs: Identify the end results or deliverables produced by the process, ensuring they meet the needs of the customers.

⑥ Identify customers: Determine who receives the outputs and understand their requirements or expectations from the process.

Creately Resources

⬊ SIPOC Templates

Documentation

Value Stream Map

A value stream map (VSM) is a diagram that visualizes the entire process of how a product or service is produced or delivered, from the raw materials or inputs to the end customer. It provides a comprehensive overview of the flow of materials, information, and activities within a process or system. Value stream mapping is often used in Lean and Six Sigma methodologies to identify inefficiencies, eliminate waste, and optimize processes.

When to Use ⤵

- Analyzing process efficiency.
- Identifying bottlenecks and waste.
- Improving workflow and cycle time.
- Visualizing end-to-end processes.
- Streamlining operations.

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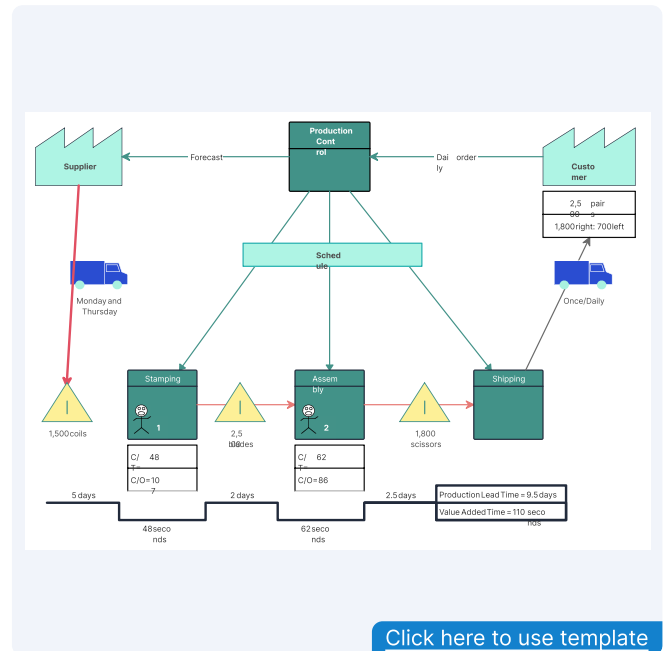
How to Use ⤵

1. Select the process: Choose the process or system you want to map-production process, service delivery, etc..

2. Gather information: Collect data on process steps, times, inventory, and metrics.

3. Draw current map: Visualize the current process steps and flow using the value stream map symbols.

4. Differentiate steps: Identify which steps add value and which don't, marking non-value-adding ones.

5. Map inventory & identify bottlenecks: Show where materials pile up and where work is in progress. Highlight parts causing slowdowns or problems.

6. Calculate metrics: Add details like how long each step takes and how much time passes between steps.

7. Draw the future state map : Create a future state map that depicts the improved process, incorporating changes and optimizations.

Creately Resources

⤵ Value Stream Mapping Software

⤵ What is Value Stream Mapping?

⤵ Value Stream Mapping Templates

Retrospective Meeting Template

A retrospective meeting template is a structured format used to conduct retrospective meetings, also known as "retros" or "post-mortems." They are effective team gatherings held at the end of a project, sprint, or time period, where participants reflect on what went well, what could be improved, and how to improve future processes.

When to Use ⬂

- Reviewing past project phases.
- Reflecting on team performance.
- Discussing lessons learned.
- Improving teamwork and processes.
- Planning actionable improvements.

Team:		Date:	
What Went Well	What Could Be Better	Action Items	Retrospective Goals

Click here to use template

How to Use ⬂

1 Set the stage: Begin by introducing the purpose of the retrospective and the context, such as the project, sprint, or time period being reviewed.

2 Gather data: Collect information and metrics related to the project's performance, including successes, challenges, and relevant user feedback.

3 Review: Facilitate a discussion where team members share what went well and what didn't go as planned, ensuring a balanced perspective.

4 Brainstorm solutions: Encourage the team to brainstorm potential improvements and solutions for the identified challenges. Focus on actionable items that can be implemented in the future.

5 Prioritize action items: Collaboratively prioritize the suggested solutions based on their impact and feasibility, selecting a few key action items for the team to work on.

Creately Resources

⬂ [Retro Software](#)

⬂ [The Ultimate Guide to Retrospectives](#)

⬂ [10 Common Mistakes to Avoid During Retrospectives](#)

⬂ [Guide to Running Retrospectives Remotely](#)

⬂ [Fun Retrospective Ideas for Hybrid Teams](#)

⬂ [54 Retrospective Questions](#)

Action Plan

An action plan is a detailed document that outlines the specific steps, tasks, resources, timelines, and responsibilities required to achieve a particular goal or objective. It serves as a roadmap, guiding individuals or teams through the implementation of strategies, projects, or initiatives.

When to Use ⬊

- Breaking down goals into steps.
- Tracking progress and completion.
- Organizing complex projects.
- Ensuring accountability.
- Facilitating effective execution.

Objectives		Tasks	Success Criteria	Time Frame	Resources
Title	Title				

Click here to use template

How to Use ⬊

1. Set clear objectives: Clearly define the specific goal or objective you want to achieve. Make it measurable, achievable, relevant, and time-bound (SMART).

2. Break it down: Divide the objective into smaller, manageable tasks or steps that contribute to the overall goal. These tasks should be clear and actionable.

3. Assign responsibilities: Identify who is responsible for each task. Assign roles to individuals or teams based on their expertise and availability.

4. Set timelines: Determine realistic deadlines for each task. Ensure the timeline aligns with the overall objective and consider any dependencies between tasks.

5. Allocate resources: Identify the resources required to complete each task, such as personnel, budget, materials, or tools.

Creately Resources

⬊ How to Create an Action Plan

⬊ Action Plan Examples

⬊ Corrective Action Plan

⬊ Employee Engagement Action Plan

Communications Plan

A communications plan is a document that outlines how you will communicate with potential customers. It should include information about your goals for communication, target audience, key messages, timeline of communications, communications budget, channels that you will use to communicate and KPIs to measure success of your communications.

When to Use ↘

- Launching a new product or service.
- Managing project or campaign communication.
- Defining target audiences and stakeholders.
- Outlining communication objectives and goals.
- Establishing timelines and responsibilities.
- Aligning communication efforts with strategy.

Shareholder	Objective	MessageContent	DeliveryMethod	Due Date

Click here to use template

How to Use ↘

1. Clearly mention your goals. Whether it's brand promotion, event awareness, or crisis management, this sets the tone.

2. Understand your audience. What drives them? How can your message create impact?

3. Craft messages that caters to each audience segment. Choose the optimal channels for maximum reach and engagement.

4. Set a realistic timeline, coordinate teams, and execute with precision.

Creately Resources

↘ How to Write a Communication Plan in 6 Steps

↘ Communications Plan Template

Lessons Learned Template

A lessons learned template is a document that helps project teams document the knowledge obtained from executing a project. It includes both positive and negative experiences that occurred throughout the project. The template typically covers the following topics: what went well, what went wrong, what could have been done better, and any valuable lessons that can be taken away.

When to Use ⬂

- Capturing successes and challenges.
- Identifying what went well and what didn't.
- Documenting best practices and pitfalls.
- Improving future project planning.
- Sharing knowledge within the organization.

ProjectName			**Lessons Learned Report**		
ProjectDescription					
ProjectManager					
Date	EnteredBy	Subject	Situation	Recommendation& Comments	Follow Up

Click here to use template

How to Use ⬂

1. Engage stakeholders in candid post-project assessments. Encourage open dialogue about successes, failures, and unexpected outcomes. Gather perspectives from all involved parties.

2. Organize findings into concise categories. Articulate key takeaways, emphasizing actionable insights. Craft a narrative that not only acknowledges challenges but transforms them into opportunities.

3. Integrate lessons into future plans. Align new initiatives with these insights to ensure history informs future action. Encourage a culture that embraces learning and growth.

4. Regular Reassessment: Periodically revisit the template. As landscapes evolve, so does wisdom. Continuously refine the template to remain relevant and potent.

Creately Resources

⬂ How to Use Lessons Learned Effectively to Avoid Project Failure

⬂ Key Project Documents Every Project Manager Needs

⬂ Lessons Learned Template

Cause and Effect Diagram

A cause and effect diagram, also known as a fishbone diagram or Ishikawa diagram, is a visual tool used to analyze and identify the potential causes of a specific problem or effect. The diagram takes its name from its shape, which resembles the skeleton of a fish. It is a structured way to brainstorm and organize the various factors that could contribute to an issue, making it easier to understand the root causes.
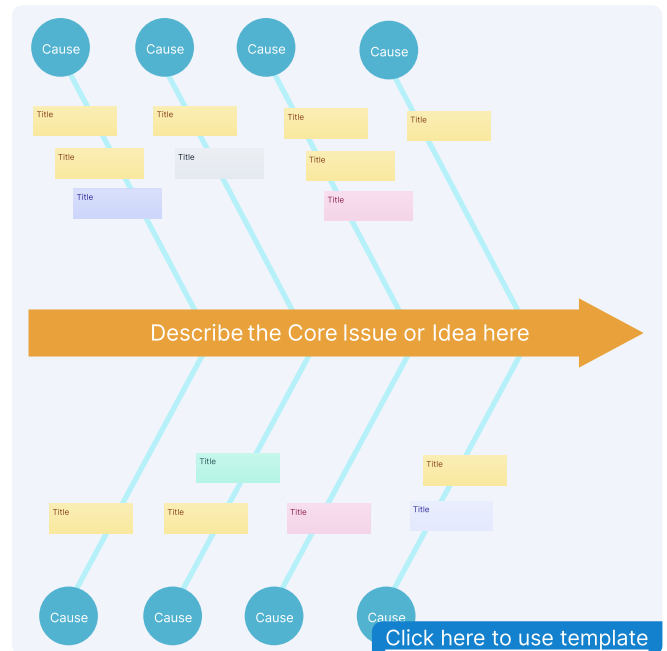
When to Use ⤵

- Investigating complex problems.
- Engaging team collaboration.
- Analyzing process inefficiencies.
- Solving quality-related issues.
- Visualizing cause-effect relationships.

Describe the Core Issue or Idea here

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How to Use ⤵

1. Define the problem: Clearly identify the problem or effect you want to analyze. Write it down at the head of the diagram.

2. Identify categories: Determine the main categories of factors that could contribute to the problem.

3. Brainstorm potential causes: Brainstorm possible factors and sub-causes that might be causing the problem. Write these factors as smaller lines branching off from the respective categories.

4. Analyze and evaluate: Discuss each potential cause and its relevance to the problem.

5. Identify root causes: Look for causes that have a significant impact and are likely to be central to the problem. These are your potential root causes.

6. Prioritize and verify: Prioritize the most likely root causes and verify them through data analysis, observations, or further investigation.

Creately Resources

⤵ Fishbone Diagram Maker

⤵ Fishbone Diagram Templates

⤵ The Ultimate Guide to Fishbone Diagrams

⤵ How to Use Cause and Effect Analysis to Solve Business Problems

Competitor Analysis

A competitive analysis (competitor analysis) is a strategic assessment process used by businesses to evaluate and understand the strengths and weaknesses of their competitors within the same industry or market segment. It involves gathering information about the products, services, marketing strategies, financial performance, and overall positioning of rival companies.

When to Use ⬊

- Understanding market dynamics.
- Developing competitive strategies.
- Benchmarking against rivals.
- Making informed business decisions.
- Planning for market differentiation.

	My Business	Competitor 1	Competitor 2	Competitor 3	Competitor 5
Products					
Price					
Quality					
Distribution Channels					
Service					
Stability					
Reliability					
Expertise					
Reputation					
Location					
Appearance					
Marketing Strategy					
Sales Method					
Trends					

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How to Use ⬊

1. Identify competitors: List direct and indirect competitors operating in the same market or industry.

2. Gather information: Collect data on competitors' products, services, pricing, distribution, marketing, and customer feedback.

3. Analyze SWOT: Evaluate each competitor's strengths, weaknesses, opportunities, and threats to identify areas of advantage and vulnerability.

4. Compare offerings: Compare your offerings to competitors', highlighting differences and potential unique selling points.

5. Market positioning: Determine where competitors stand in terms of market share, reputation, and customer perception.

   Strategic insights: Based on the analysis, develop strategies to capitalize on competitors' weaknesses, differentiate your offerings, and position your business effectively.

Creately Resources

⬊ How to do a Competitive Analysis   ⬊ Competitive Analysis Template

Customer Journey Map

A customer journey map is a visual tool that businesses use to understand the complete experience a customer goes through when dealing with them. It shows the various steps, interactions, and emotions the customer encounters from first learning about the business to becoming a loyal customer.

When to Use ⬂

- Visualizing touchpoints and interactions.
- Identifying pain points and gaps.
- Improving customer satisfaction.
- Improving teamwork and processes.
- Enhancing product/service delivery.

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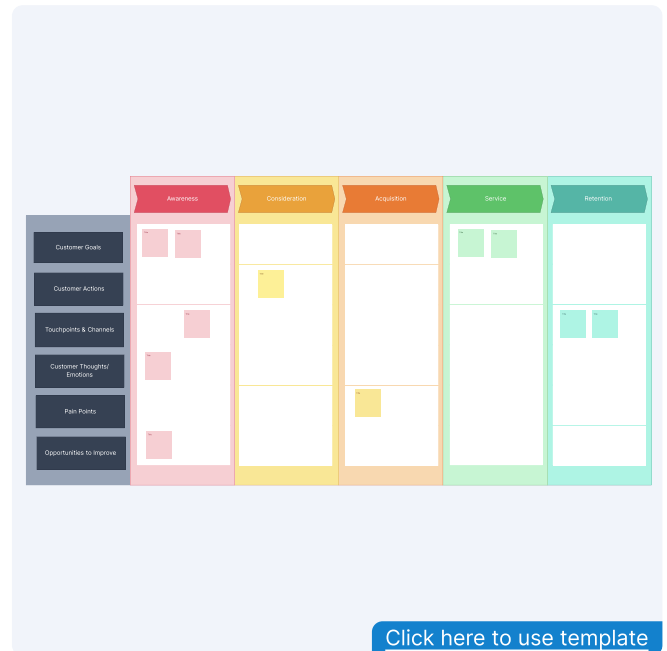
How to Use ⬂

1. Define customer persona: Start by understanding your typical customer. Define a detailed customer persona, including demographics, preferences, goals, etc.

2. Identify customer touch points: List all the interactions or touchpoints a customer has with your business.

3. Map stages: Divide the customer's journey into key stages, such as Awareness, Consideration, Purchase, Use, and Advocacy.

4. Plot emotions and actions: For each stage and touchpoint, map out the customer's emotional state, actions, goals, and pain points.

5. Analyze and improve: Identify areas where the customer experience can be improved. Develop solutions to improve the overall journey.

Creately Resources

⬂ Customer Journey Map Templates

⬂ Customer Journey Map Tool

⬂ Learn How to Create Customer Journey Maps

Empathy Map

An empathy map is a visual tool that helps teams gain a better understanding of their users. It is divided into four quadrants: Says, Does, Thinks, and Feels. The 'Says' quadrant captures what the user says. The 'Does' quadrant captures what the user does, both physically and digitally. The 'Thinks' quadrant captures what the user is thinking. The Feels quadrant captures how the user is feeling, both emotionally and physically.

When to Use ⤵

- Understanding user or customer perspectives.
- Developing user-centered products or services.
- Identifying pain points and needs.
- Creating targeted marketing strategies.

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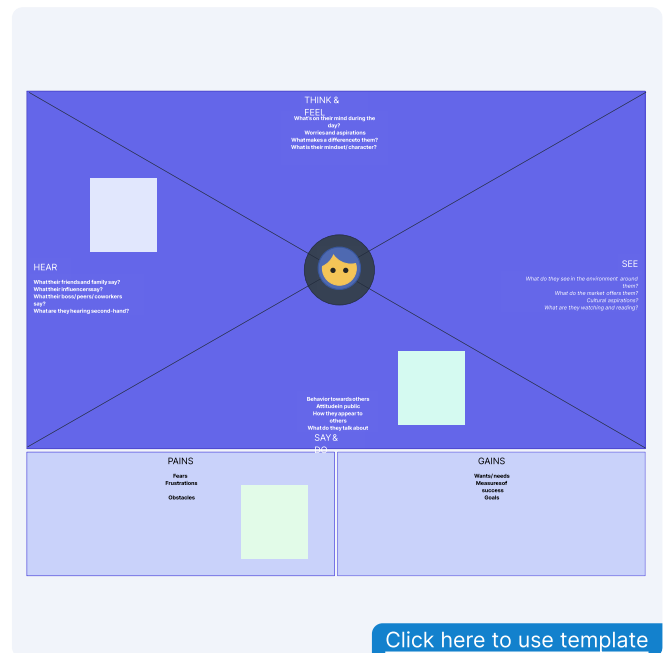
How to Use ⤵

1. Assemble a diverse team to bring different perspectives to the table.
2. Select a specific persona or target group to empathize with.
3. Engage in thoughtful discussions and research to populate each quadrant.
4. Identify patterns and revelations to illuminate new avenues for innovation.

Creately Resources

⤵ How to Visualize A Customer-Centric Strategy

⤵ Empathy Map Template

⤵ The Ultimate List Of Visual User Research Methods

Force Field Analysis

A force field analysis is a decision-making and problem-solving technique used to assess the driving and restraining forces that influence a proposed change or decision within an organization or situation. It was developed by Kurt Lewin, a social psychologist.

When to Use ⬂

- Assessing change or decision impact.
- Planning change management strategies.
- Gaining insights into resistance and support.
- Facilitating informed decision-making.

Driving Forces	Score

Change Proposal & Goals

Restraining Forces	Score

Total	

Total	

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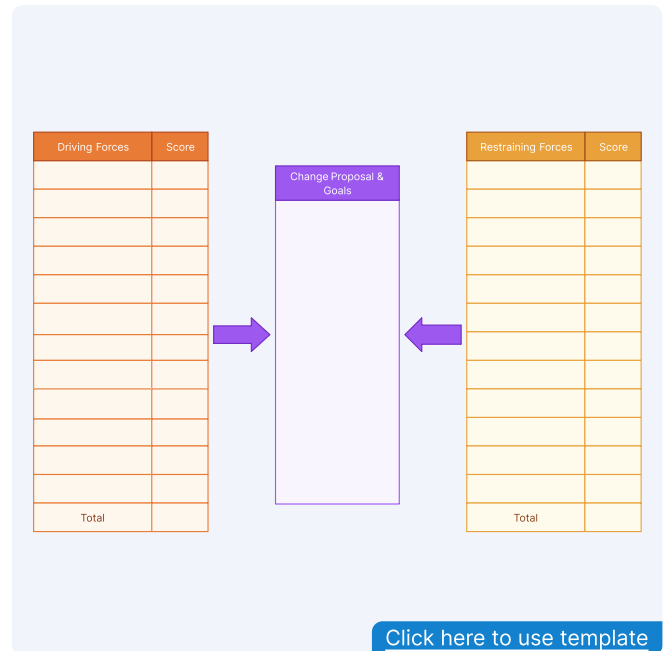
How to Use ⬂

1 Define the change: Clearly define the change or decision you're analyzing, and articulate its goals and expected outcomes.

2 Identify driving forces: List all factors that encourage or support the change. These could be market trends, customer demands, competitive pressures, etc.

3 Identify restraining forces: List factors that oppose the change, such as resistance from employees, financial constraints, cultural barriers, etc.

4 Assign weight and score: Give a numerical value or score to each force to represent its strength or influence, typically on a scale of 1 to 5.

5 Visualize the forces: Create a visual representation with arrows indicating the direction and strength of each force. Driving forces push for change, while restraining forces counteract it.

6 Analyze and decide: Assess the balance between driving and restraining forces. Develop strategies to enhance driving forces, address restraining forces, or find ways to minimize their impact to ensure successful change implementation.

Creately Resources

⬂ Force Field Analysis

⬂ Guide to Understanding the Force Field Analysis

⬂ Change Management Tools to Drive Change

User Persona Diagram

A user persona diagram is a fictional representation of a specific type of user or customer that a product or service is designed for. User personas encompass various characteristics, behaviors, goals, needs, and preferences of a typical user within a specific demographic or user group.

When to Use ⤵

- Understanding user behaviors.
- Identifying user needs and goals.
- Designing user-centered products/services.
- Guiding product development decisions.
- Personalizing marketing strategies.
- Improving user experience.

Goals:	Pain Points:
Age: Gender: Marital Status: Location:	Motivations:
	Channel:
Education: Occupation: Annual Income:	Devices:
Name:	Key Strategies:
Behavior:	

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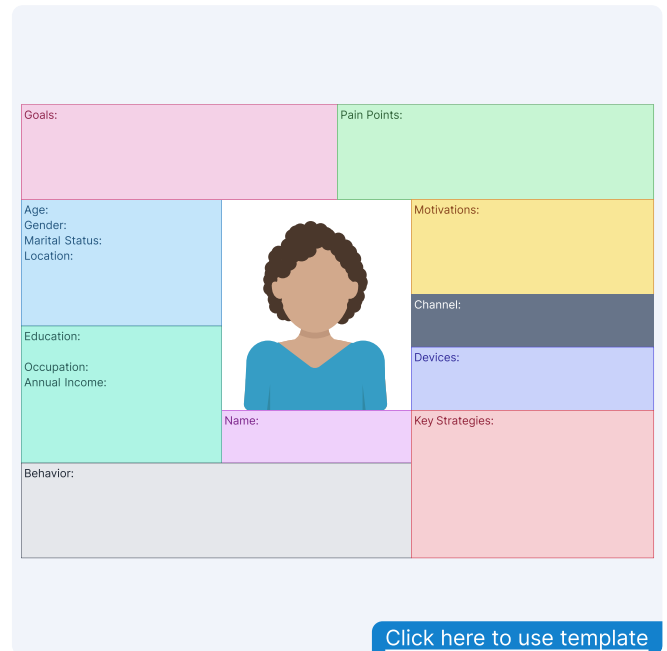
How to Use ⤵

1. Gather data: Collect insights from user research, surveys, interviews, and analytics to understand user behaviors, preferences, needs, and goals.

2. Identify patterns: Analyze the collected data to identify common trends, behaviors, and pain points among users, and group them based on shared characteristics.

3. Segmentation: Create distinct user segments, each representing a specific group with similar demographics, behaviors, and objectives.

4. Create the user persona: Develop personas for each user segment by giving them a name, photo, and detailed attributes, including job role, age, goals, challenges, etc.

Creately Resources

↘ User Persona Creator

↘ How to Create a Buyer Persona

↘ UX Research Methods

↘ Visual User Research Methods

↘ UX Research Plan

ADL Matrix

The ADL matrix is a tool that can be used to understand the life cycle of an industry (from growth to decline) and then compare it with the market position, which helps businesses manage their portfolio. The ADL matrix helps businesses to make critical decisions,by providing insights on where to invest, what strategies to employ and how to stay ahead of the competition.

When to Use ⤵

- Analyzing business portfolio.
- Evaluating strategic business units (SBUs).
- Assessing market growth and relative market share.
- Making resource allocation decisions.
- Developing growth strategies.

		Industrial Maturity			
		Embryonic Stage	Growth Stage	Mature Stage	Aging Stage
Competitive Position	Dominant	All out push for share. Hold position.	Hold position. Hold share.	Hold position. Grow with industry.	Hold position.
	Strong	Attempt to improve position. All out push for share.	Attempt to improve position. Push for share.	Hold position. Grow with industry.	Hold position or harvest.
	Favorable	Selective or all out push for share. Selectively attempt to improve position.	Attempt to improve position. Push for share.	Custodial or maintenance. Find niche and attempt to protect it.	Harvest or phase out withdrawal.
	Tenable	Selectively push for position.	Find niche and protect it.	Find niche and hang on, phased out withdrawal.	Phased out withdrawal or abandon.
	Weak	Up or out.	Turnaround or abandon.	Turnaround, or phanedout withdrawal.	Abandon.

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How to Use ⤵

1. Compile data on market trends and competitive forces to rate Industry Attractiveness and Competitive Advantage on a scale.

2. Plot your business units, products, or services on the matrix based on their scores in the two dimensions.

3. Identify growth opportunities by pinpointing segments where Industry Attractiveness surpasses Competitive Advantage, prompting innovation or partnerships.

4. Make informed resource allocation decisions by focusing efforts where your Competitive Advantage aligns with Industry Attractiveness.
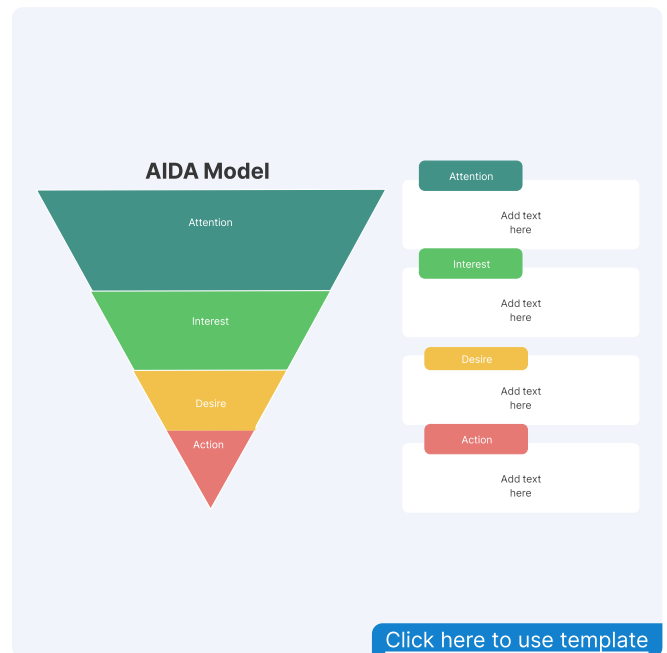
Creately Resources

⤵ ADL Matrix

AIDA Model

The AIDA (Attention, Interest, Desire and Action) model explains the four phases that a consumer goes through, before making a purchase decision. This framework helps content marketers better understand their target audience and create persuasive content that helps grab attention to their products, sparks interest, create a desire to attain them and ultimately drive action to purchase.

When to Use ⬊

- Creating marketing or advertising content.
- Guiding customer engagement.
- Designing persuasive communication.
- Building awareness of a product or service.

AIDA Model

Attention

Interest

Desire

Action

Attention

Add text here

Interest

Add text here

Desire

Add text here

Action

Add text here

Click here to use template

How to Use ⬊

1. Grab your audience's focus with a powerful hook. Pose a question, share a startling statistic, or craft a compelling headline that stops them in their tracks.

2. Once you have their attention, unveil a problem they can relate to, and then offer a solution that captivates their interest. Showcase benefits and unique selling points to keep them engaged.

3. Present the value of your product or idea. Appeal to emotions, show how it fulfills their needs, and paint a vivid picture of the positive outcomes it brings.

4. Seal the deal with a clear and compelling call to action. Whether it's to buy, sign up, or simply learn more, guide your audience towards the next steps they need to take.

Creately Resources

⬊ AIDA Model

⬊ How to Develop and Effective Marketing Mix

Ansoff Matrix

A user persona diagram is a fictional representation of a specific type of user or customer that a product or service is designed for. User personas encompass various characteristics, behaviors, goals, needs, and preferences of a typical user within a specific demographic or user group.

When to Use ⬊

- Understanding user behaviors.
- Identifying user needs and goals.
- Designing user-centered products/services.
- Guiding product development decisions.
- Personalizing marketing strategies.
- Improving user experience.

Existing New

Existing

Market Penetration Strategy

Product Development Strategy

New

Market Development Strategy

Diversification Strategy

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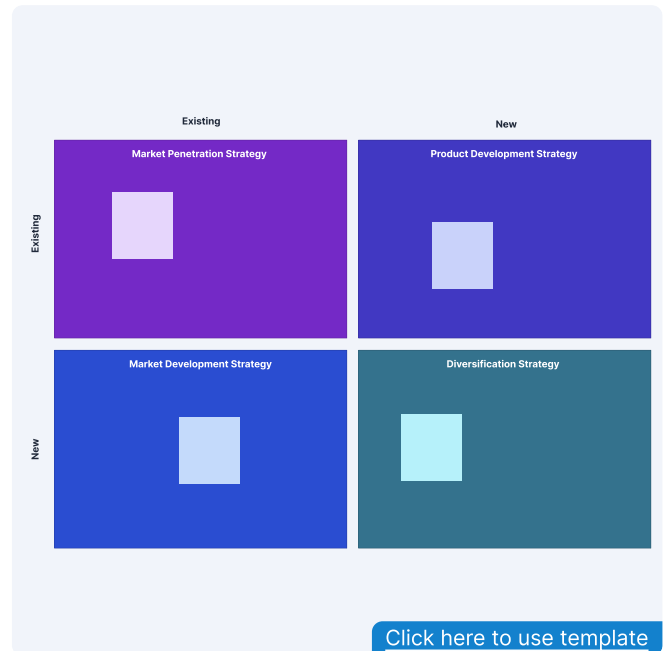
How to Use ⬊

1. Define your objective: Clearly state your growth goal, such as increasing market share, expanding into new markets, launching new products, or diversifying your business.

2. Assess your current position: Understand your current products, target markets, and competitive landscape. Identify where you are on the matrix (existing products/markets or new products/markets).

3. Choose the relevant strategy: Select the growth strategy that aligns with your objective and current position.

4. Develop an action plan: Create a detailed plan for implementing the chosen strategy. Specify the tactics, resources, and timeline required to execute the plan effectively.

5. Monitor and adjust: Continuously track the progress of your chosen strategy, analyzing the results against your objective.

Creately Resources

⬊ Ansoff Matrix Examples

⬊ Marketing Strategy Planning Tools

BCG Matrix

Devised by Boston Consulting Group, this matrix helps categorize your products or services and make informed decisions about resource allocation. The categorization is done based on four quadrants.

- Cash cows: Products with a high market share in a low-growth market. They generate a lot of cash, but they don't require a lot of investment.
- Dogs: Products with a low market share in a low-growth market. They are not profitable and may be candidates for divestment.
- Stars: Products with a high market share in a high-growth market. They require a lot of investment, but have the potential to be very profitable.
- Question marks: Products with a low market share in a high-growth market. They are not yet profitable, but they have the potential to become stars if they receive enough investment.

	HIGH	LOW
HIGH	High market growth rate High relative market share ★	High market growth rate Low relative market share ?
LOW	Low market growth rate High relative market share	Low market growth rate Low relative market share

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When to Use ⬂

- Analyzing a business's product portfolio.
- Evaluating market growth and market share.
- Identifying strategic priorities for different products.
- Developing growth and divestment strategies.
- Planning for future product development.

Creately Resources

⬂ BCG Matrix Template

⬂ The Ultimate List of Marketing Strategy Planning Tools

How to Use ⬂

1. Gather data on market growth rate and relative market share for each product.

2. Position products on the matrix based on their growth and share values.

3. Identify Stars for growth investment, Cash Cows for steady income generation, Question Marks for potential, and Dogs for reassessment.

4. Devise strategies tailored to each quadrant. Nurture Stars, optimize Cash Cows, decide on Question Marks' fate, and consider divestment or revitalization for Dogs.

Business Capability Map

A business capability map provides a snapshot of a business's inner workings. It captures the fundamental abilities, processes, technologies, and resources that facilitate your operations. This framework serves as a strategic tool, enabling leaders, managers, and stakeholders to align their vision, make informed decisions, and drive growth.
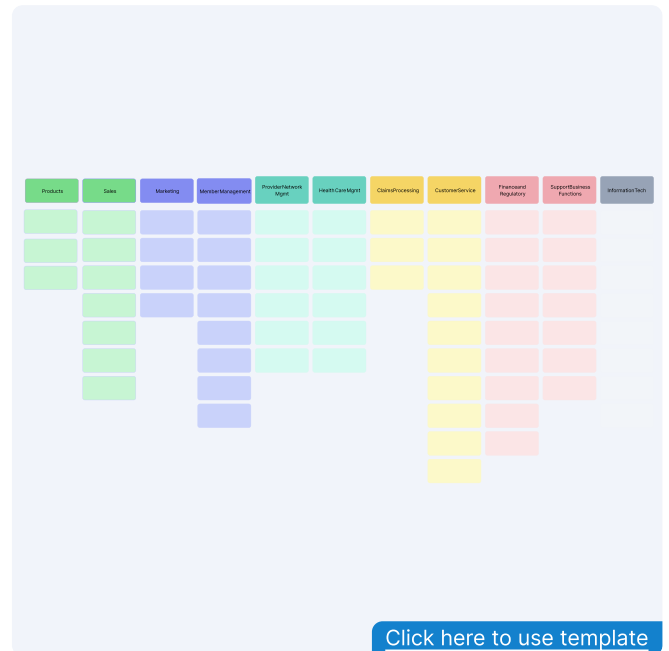
When to Use ⤵

- Analyzing an organization's core capabilities.
- Identifying strengths and weaknesses within operations.
- Planning for growth or transformation.
- Improving resource allocation decisions.
- Communicating complex business structures clearly.

Click here to use template

How to Use ⤵

1. Identify and document key capabilities across departments. What sets you apart? What's your secret sauce?

2. Visualize the relationships between capabilities, revealing insights that fuel innovation and synergies.

3. Map current and future states. Chart your growth path, highlighting gaps and opportunities for investment and improvement.

4. With a clear map, empower your teams to deliver results, aligning efforts with overarching objectives.

Creately Resources

⟲ Business Capability Map

Business Model Canvas

The Business Model Canvas is a strategic tool that provides a structured framework for developing, describing, and analyzing a business model. The canvas consists of nine key blocks that cover the essential aspects of a business: customer segments, value propositions, channels, customer relationships, revenue streams, key resources, key activities, key partnerships, and cost structure.
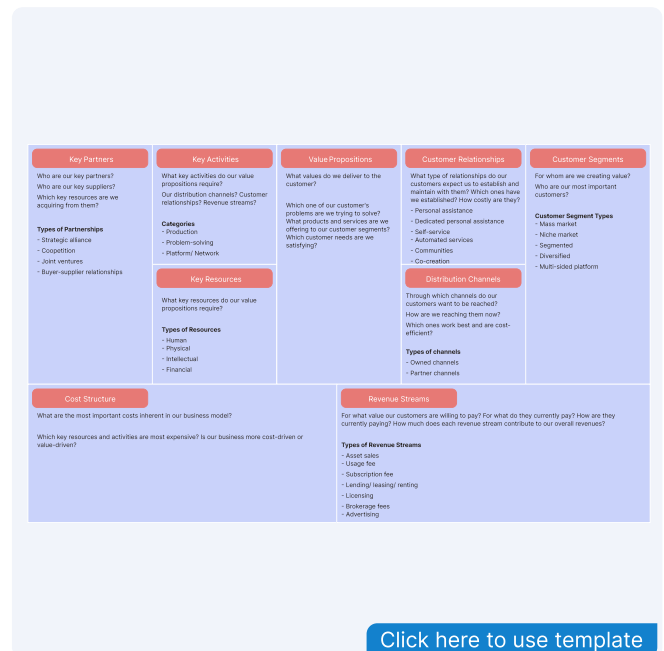
When to Use ⬊

- Communicating business concepts succinctly.
- Developing or refining a business idea.
- Designing a new business model.

Click here to use template

How to Use ⬊

1. Start with a clear focus: Begin by identifying a specific business or project for which you want to design or analyze the business model. Define the purpose, objectives, and scope of the canvas.

2. Fill in each block: Work through each of the nine blocks of the canvas, filling in the details related to your business or project.

3. Visualize the interactions: Focus on how each block interacts with the others.

4. Identify gaps and opportunities: Evaluate your canvas to identify areas of strength, weaknesses, gaps, or opportunities. Look for potential innovations, cost-saving measures, and ways to improve value delivery to customers.

5. Communicate and collaborate: Use the canvas as a visual communication tool within your team, with stakeholders, or when seeking investments or partnerships.

Creately Resources

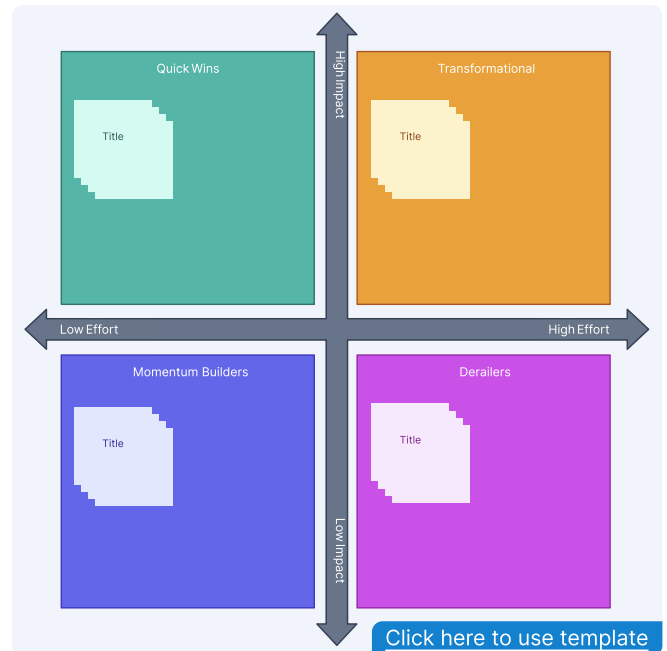⬊ Business Model Canvas Template

⬊ What is a Business Model Canvas

Impact Effort Matrix

The Impact Effort Matrix helps you to discover high-impact opportunities by evaluating tasks or ideas based on their potential impact and required effort. It helps guide your business decisions with clarity and precision. Whether you're a leader, project manager, or an individual aiming to maximize efficiency, this template empowers you to prioritize wisely. Use the impact effort matrix to channel resources efficiently, and align efforts towards achieving organizational goals.

When to Use ⬊

- Assessing potential initiatives based on impact and effort.
- Making decisions on resource allocation.
- Identifying quick wins and high-impact opportunities.
- Focusing on projects that deliver the most value.

High Impact

Quick Wins	Transformational
Title	Title

Low Effort   High Effort

Momentum Builders	Derailers
Title	Title

Low Impact

Click here to use template

How to Use ⬊

1. List your projects on the horizontal axis, from game-changing innovations to routine tasks

2. Vertically, gauge the potential impact of each project – high, medium, or low.

3. Assign an effort level to each project – simple, moderate, or complex.

4. Plot your projects on the matrix. Instantly, you'll see the high-impact, low-effort gems, and the complex tasks that might demand more resources.

Creately Resources

⬊ Impact Effort Matrix Template

⬊ Visual Guide to Feature Prioritization

Lean Canvas

The Lean Canvas template is a business planning tool that helps entrepreneurs visualize and test business ideas. It is divided into nine sections, including problem, solution, key metrics, and cost structure. The Lean Canvas template can be used to validate assumptions, identify risks, and iterate on your business model. Here are the nine sections of the Lean Canvas template

- Problem: What problem are you solving?
- Solution: How are you solving the problem?
- Customer Segments: Who are your target customers?
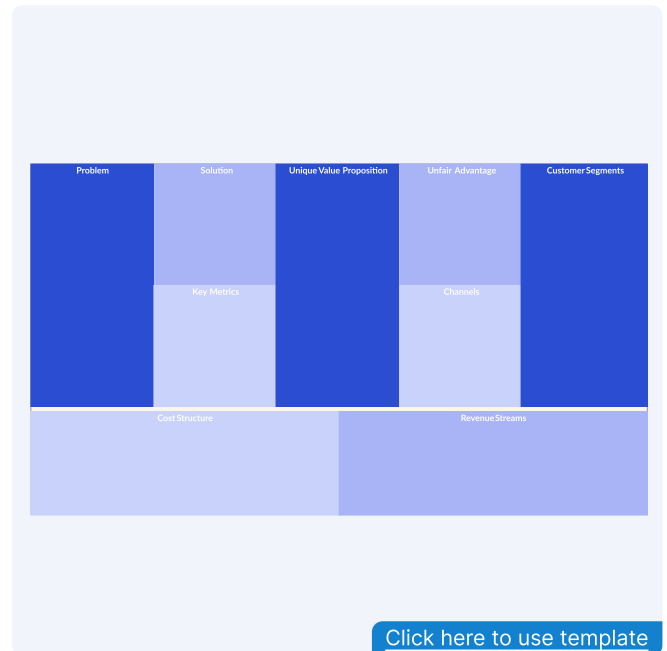- Channels: How will you reach your customers?
- Customer Relationships: How will you interact with your customers?
- Revenue Streams: How will you make money?
- Key Activities: What are the most important things you need to do to run your business?
- Key Resources: What resources do you need to succeed?
- Key Partnerships: Who can help you achieve your goals?

Problem	Solution	Unique Value Proposition	Unfair Advantage	Customer Segments
	Key Metrics		Channels	
Cost Structure		Revenue Streams		

Click here to use template

When to Use ⤵

- Developing a new business idea.
- Evaluating a business model quickly.
- Testing assumptions and hypotheses.
- Focusing on problem-solving and solutions.
- Iterating and adapting the business concept.

How to Use ⤵

1. Start by clearly defining the problem you're addressing. What pain point are you solving?

2. Articulate your solution succinctly. How does your product/service resolve the identified problem?

3. Identify your ideal customers. Who will benefit most from your solution?

4. Outline how your business generates income. What pricing model works best for your solution?

Creately Resources

⤵ Top 6 Methods of Innovation to Come up with Unique Product Ideas

⤵ Lean Canvas Template

OKR Goal Setting Template

The OKR goal setting template is a framework for setting and tracking goals. It stands for Objectives and Key Results. Objectives are ambitious but achievable. They should be specific, measurable, attainable, relevant, and time-bound. Key Results are measurable steps that will help you achieve your objectives. They should be specific, quantifiable, and trackable.

OKRs are set quarterly. This allows teams to regularly review and adjust their goals. OKRs are transparent. Everyone in the organization should know what the goals are and how they are being measured.

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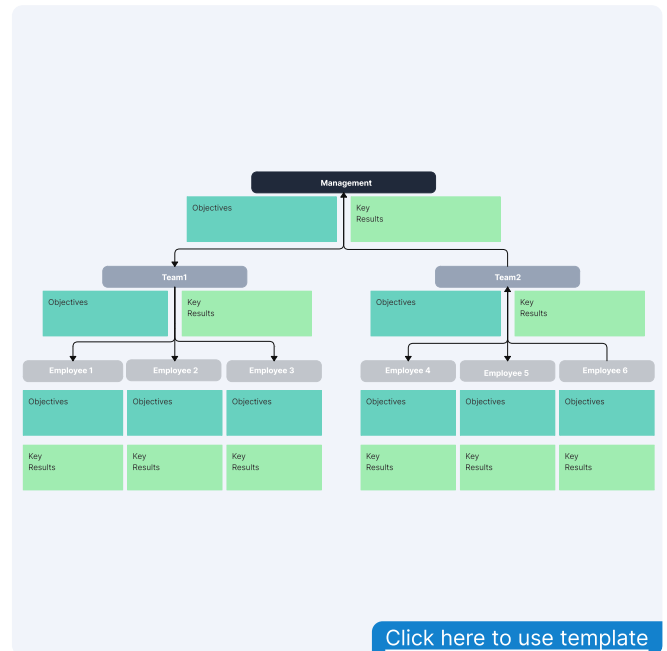
When to Use ⬂

- Setting and tracking goals.
- Measure the success of new projects and initiatives.
- Performance measurement.

How to Use ⬂

1. Outline specific and achievable objectives.

2. Set measurable key results that reflect tangible milestones towards your objectives.

3. Assign responsibilities for each key result, ensuring a clear chain of accountability.

4. Consistently track your progress and adapt your OKRs as needed.

Creately Resources

⬂ OKR Template

⬂ The Easy Guide to the Goal Setting Process

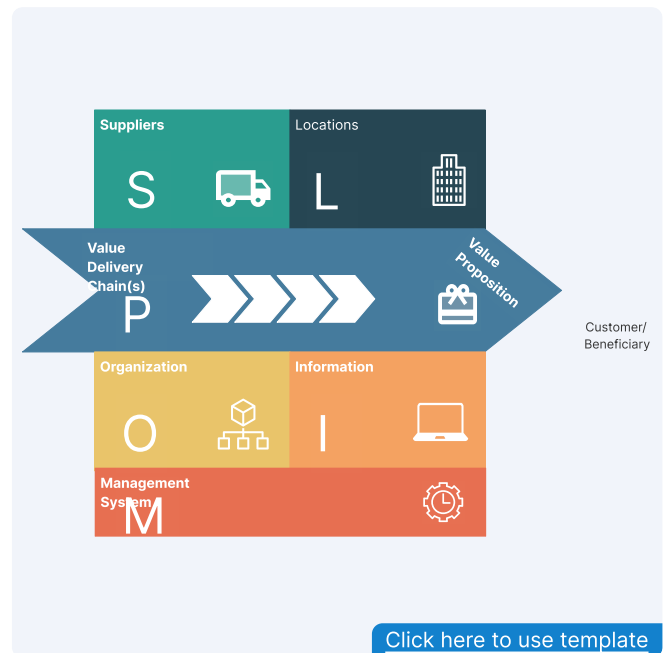# Operating Model Canvas

The Operating Model Canvas - developed by Andrew Campbell, Mikel Gutierrez, and Mark Lancelott - is a visualization of how your business delivers value to customers. It is also a representation of how an organization operates. The operating model canvas template includes the following components:

- Processes – the work that should be done to deliver the value proposition
- Organization – how the people who are responsible to do the work is organized
- Locations – where the work is done (what buildings and assets are needed in these locations)
- Information – what information is needed to get the work done
- Suppliers – who provides inputs to the work and stakeholder relationships
- Management systems – Processes that are used to manage business operations such as planning, budgeting, etc

Suppliers S

Locations L

Value Delivery Chain(s) P

Value Proposition

Customer/ Beneficiary

Organization O

Information I

Management System M

Click here to use template

When to Use ⤵

- Designing or refining an organization's operating model.
- Identifying areas for improvement and innovation.
- Aligning business operations with strategic goals.
- Communicating the organization's structure and operations.

How to Use ⤵

1 Assemble your team. Collaborate to discover insights and perspectives on each of the above components.

2 Brainstorm with your team members and gather their feedback to refine your understanding.

3 Pivot, iterate, and uncover opportunities. The Canvas allows you to test, learn, and evolve, ensuring your business stands strong in any market.

4 Revisit the Canvas as you grow, adapting to shifting market trends.

Creately Resources ⤵ Operating Model Canvas Template

Perceptual Map

A perceptual map template is a tool that marketers use to understand how consumers perceive their products or brands relative to the competition. The template typically plots two or more key attributes of the products or brands on a two-dimensional axis, such as price and quality. The relative positions of the products or brands on the map indicate how consumers perceive them based on those attributes. Perceptual maps can be used to identify opportunities for product differentiation, to target marketing campaigns, and to track changes in consumer perceptions over time.

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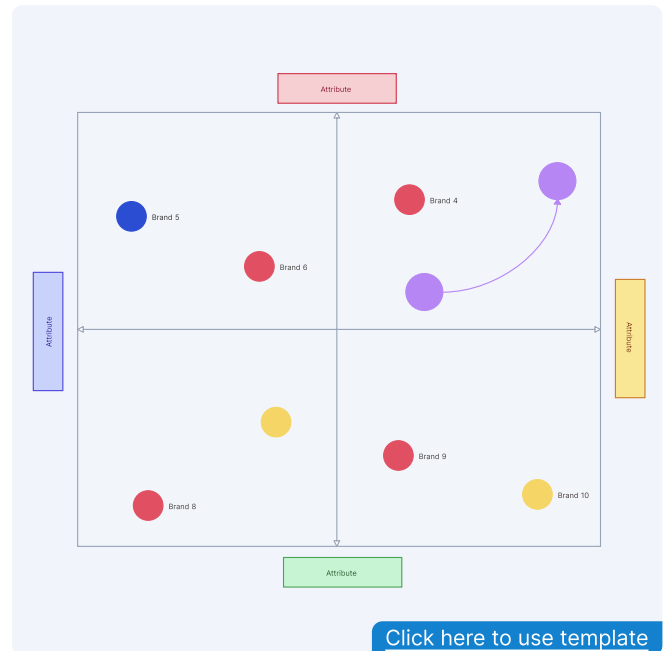
When to Use ⤵

- Analyzing market positioning.
- Visualizing consumer perceptions.
- Identifying competitive gaps.
- Assessing brand attributes.
- Understanding market trends.

How to Use ⤵

1. Pinpoint the crucial attributes that define your market, such as price, quality, or features.

2. Place competing products on the map relative to these attributes.

3. Plot your product, pinpointing its current market position.

4. Analyze the map to devise effective strategies for repositioning, differentiating, or targeting specific customer segments.

Creately Resources

⤵ Implement a Successful Marketing Intelligence Strategy
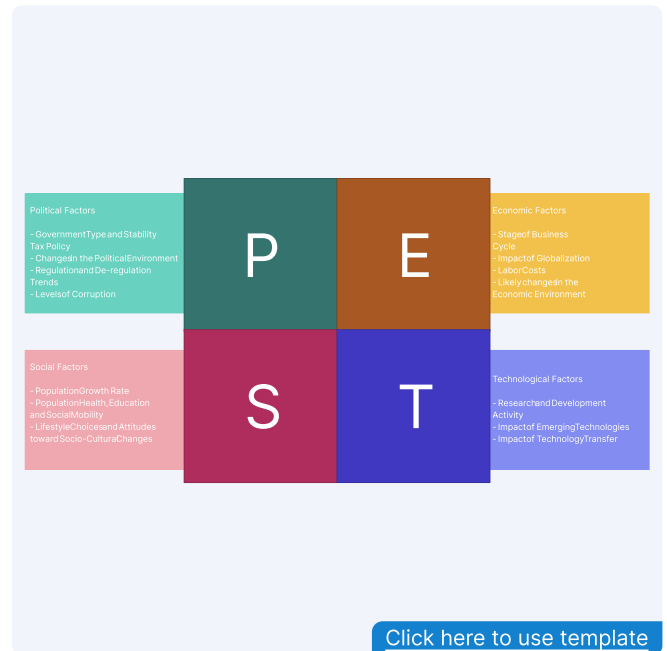
⤵ Guide to Building an Effective Go-to-Market Strategy

PEST Analysis

A PEST analysis is a strategic framework used by businesses to assess the external macro-environmental factors that can impact their operations: Political, Economic, Social, and Technological.

When to Use ⤵

- Analyzing macro-environmental influences.
- Evaluating business strategy impact.
- Identifying potential opportunities and threats.
- Considering market and industry trends.
- Making informed strategic decisions.
- Planning for market entry or expansion.

Political Factors

- Government Type and Stability
- Tax Policy
- Change in the Political Environment
- Regulation and De-regulation Trends
- Levels of Corruption

P

Economic Factors

- Stage of Business Cycle
- Impact of Globalization
- Labor Costs
- Likely change in the Economic Environment

E

Social Factors

- Population Growth Rate
- Population Health, Education and Social Mobility
- Lifestyle Choices and Attitudes toward Socio-Cultural Changes

S

Technological Factors

- Research and Development Activity
- Impact of Emerging Technologies
- Impact of Technology Transfer

T

Click here to use template

How to Use ⤵

1. Identify categories: Divide the analysis into four categories: Political, Economic, Social, and Technological.

2. Political factors: Examine political influences such as regulations, government stability, trade policies, and legal considerations that could impact the business.

3. Economic factors: Evaluate economic indicators like GDP growth, inflation rates, exchange rates, and market trends that affect the business's financial stability and growth potential.

4. Social factors: Explore societal trends, demographics, cultural shifts, consumer behavior, and attitudes that could influence demand, preferences, and marketing strategies.

5. Technological factors: Consider technological advancements, innovation, automation, and disruptions that may impact operations, products, or services.

6. Assessment and action: Analyze the collected data in each category to identify opportunities and threats. Develop strategies to capitalize on favorable factors and mitigate risks posed by unfavorable factors, aligning the business with the changing external environment.

Creately Resources

⬊ PEST Analysis Tool

⬊ SWOT Analysis and PEST Analysis – When to Use Them

⬊ PEST Analysis Templates

P

A

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Strategy & Planning

Porter's Five Forces

Porter's five forces analysis template is a strategic management tool that helps businesses assess the competitive landscape of an industry. The five forces are:

- **The threat of new entrants:** How easy is it for new businesses to enter the market?
- **Bargaining power of suppliers:** How much power do suppliers have over prices?
- **Bargaining power of buyers:** How much power do buyers have over prices?
- **The threat of substitute products or services:** How easy is it for customers to switch to alternative products or services?
- **Rivalry among existing competitors:** How intense is the competition between existing businesses in the industry?
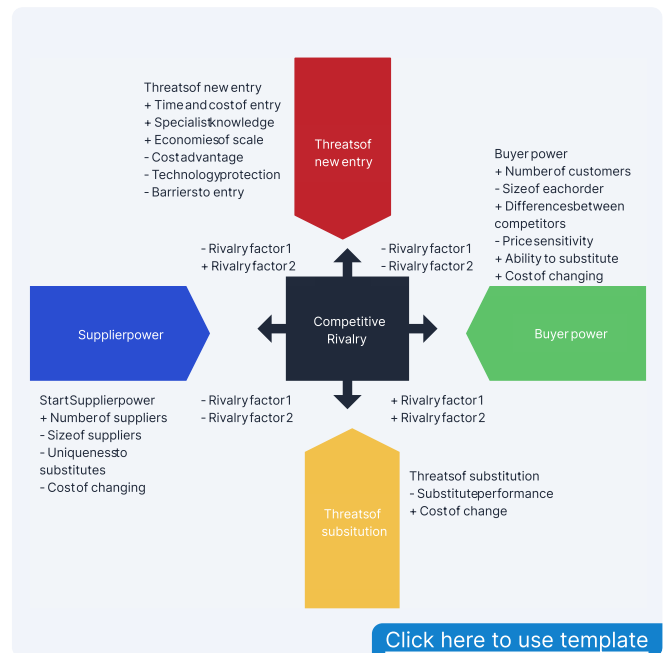
By understanding these forces, businesses can develop strategies to improve their competitive position and profitability.

When to Use ⬊

- Entering new markets.
- Product launches.
- Introducing new pricing strategies.
- Entering into strategic partnerships.
- Market expansion.

Threats of new entry
+ Time and cost of entry
+ Specialist knowledge
+ Economies of scale
- Cost advantage
- Technology protection
- Barriers to entry

Threats of new entry

Buyer power
+ Number of customers
- Size of each order
+ Differences between competitors
- Price sensitivity
+ Ability to substitute
+ Cost of changing

- Rivalry factor 1
+ Rivalry factor 2

- Rivalry factor 1
- Rivalry factor 2

Supplier power

Competitive Rivalry

Buyer power

Start Supplier power
+ Number of suppliers
- Size of suppliers
- Uniqueness to substitutes
- Cost of changing

- Rivalry factor 1
- Rivalry factor 2

+ Rivalry factor 1
+ Rivalry factor 2

Threats of subsitution
- Substitute performance
+ Cost of change

Threats of subsitution

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Creately Resources

⬊ [How to Successfully Achieve and Sustain Competitive Advantage](#)

⬊ [The Easy Guide to Performing an Effective Situation Analysis](#)

⬊ [How to Do a Competitive Analysis](#)

How to Use ⬊

1. Collect data on market opportunities, competitor profiles, and industry trends.
2. Evaluate the five forces, grading their impact on your business. Pinpoint vulnerabilities and opportunities.
3. Devise a proactive plan. Evaluate your strengths, mitigate threats, and enhance your competitive advantage.
4. Regularly reassess your analysis to adapt to shifting forces and maintain your edge.

Product Roadmap

A product roadmap is a strategic planning tool used by businesses to outline the vision, goals, and timeline for the development and enhancement of a product. It provides a high-level overview of the product's evolution, including key features, milestones, and planned releases. The product roadmap helps align teams, stakeholders, and resources around a shared product vision, making sure that everyone is on the same page regarding the product's direction.
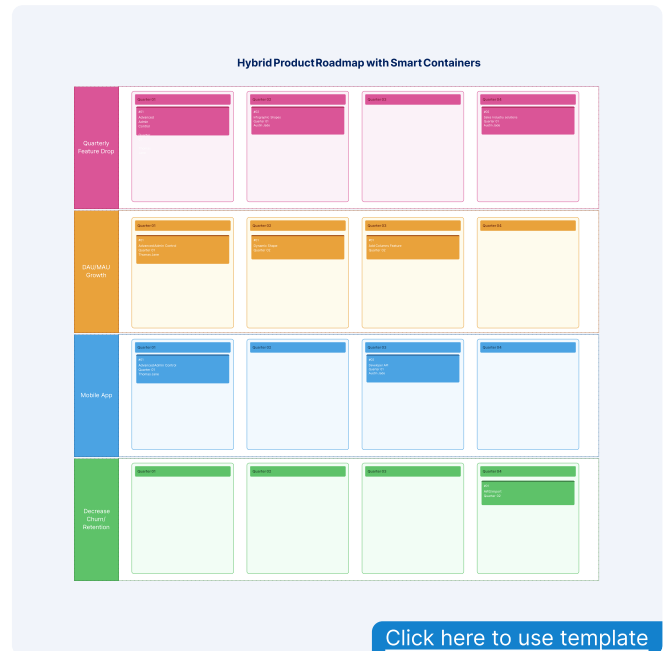
When to Use ⬊

- Planning product development.
- Communicating product strategy.
- Managing product features.
- Prioritizing tasks and releases.
- Tracking product progress.

Hybrid Product Roadmap with Smart Containers

Click here to use template

How to Use ⬊

1. Define vision: Clearly articulate the product's overall vision, goals, and objectives.

2. Identify priorities: Determine the most important features, enhancements, or fixes based on customer needs, market trends, and business goals.

3. Set timeline: Outline key milestones and expected release dates for each prioritized item, creating a timeline for the product's development.

4. Share with teams: Communicate the roadmap to relevant teams, such as product, development, sales, and marketing, ensuring alignment and understanding.

5. Review and adapt: Regularly review the roadmap, assess progress, and adjust priorities based on customer feedback, & changing technology or business requirements.

Creately Resources

⬊ How to Create a Product Roadmap

⬊ Product Roadmapping Software

⬊ Business Roadmap Template

⬊ Online Roadmap Maker

Project Charter

The Project Charter Template is a strategic blueprint that defines the project's scope, objectives, stakeholders, and initial roadmap. It lays the groundwork for seamless collaboration, clear communication, and informed decision-making from the project's inception. Project Charter helps teams to align efforts toward shared goals.

When to Use ⤵

- Initiating a new project.
- Establishing project constraints and assumptions.
- Setting project goals and success criteria.
- Gaining approval and commitment from stakeholders.
- Providing a clear project foundation for teams.

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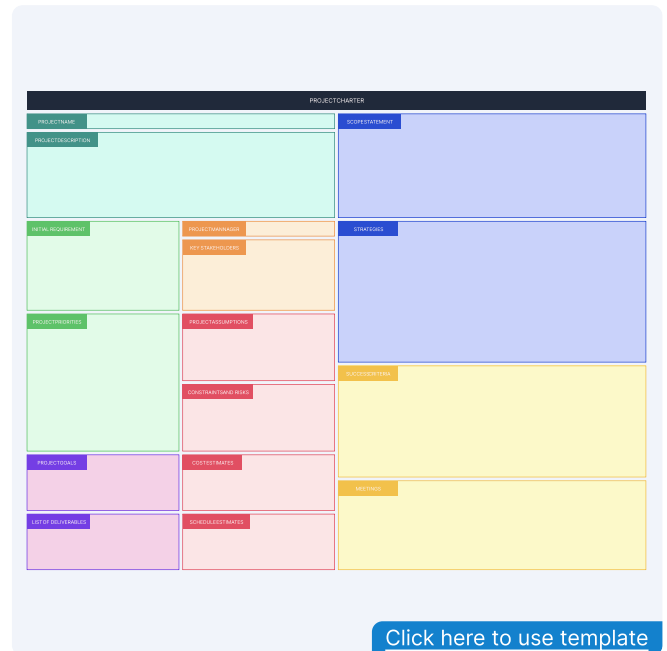
How to Use ⤵

1 Clearly establish the project's purpose, goals, and expected outcomes.

2 Pinpoint the stakeholders, team members, and sponsors. Knowing who's involved ensures smooth communication and accountability.

3 Clearly define the project's boundaries, deliverables, and constraints. This prevents scope creep and keeps the project on track.

4 Present the Charter to stakeholders for buy-in. Their approval solidifies commitment and lays the groundwork for a successful project.

Creately Resources

⬂ How to Create a Winning Project Charter

⬂ Key Project Documents Every Project Manager Needs

Risk Assessment Matrix

The Risk Assessment Matrix is a useful visual tool to foresee and manage potential risks. Streamline decision-making as you identify, evaluate, and prioritize risks that might hinder your goals. This framework allows project managers, entrepreneurs, and safety officers to take proactive action to mitigate vulnerabilities. It brings together quantitative analysis with qualitative insights, revealing vulnerabilities and helping to devise strategies to mitigate them.
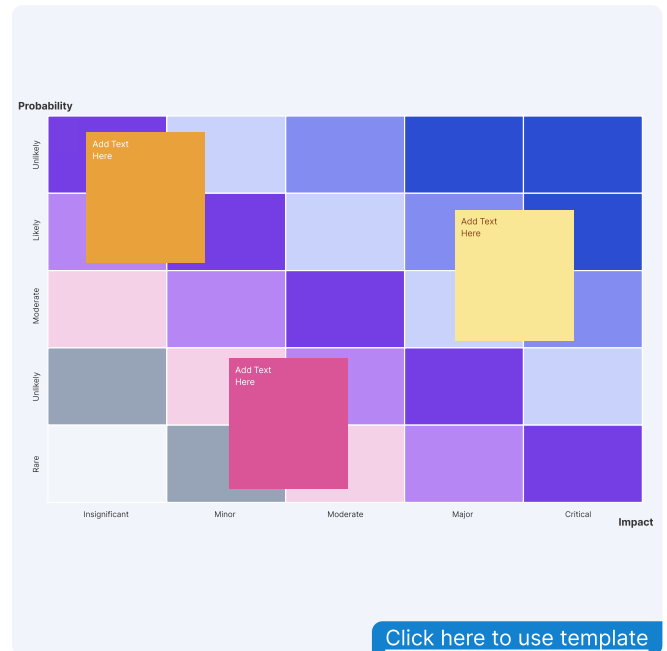
When to Use ⬂

- Developing risk mitigation strategies.
- Communicating risk information to stakeholders.
- Making informed decisions about risk management.
- Identifying areas needing increased attention.

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How to Use ⬂

1. List down potential risks by brainstorming various scenarios that your venture might encounter. These could range from market fluctuations to operational mishaps.

2. Quantify the potential impact and likelihood of each scenario. A sophisticated scoring system aids in prioritizing where attention is paramount.

3. Craft actionable strategies to mitigate each identified risk. With clarity and foresight, you'll be ready to steer clear of obstacles.

4. Markets are dynamic, and risks evolve. Regularly revisit your template to align it with the shifting landscape, ensuring perpetual preparedness.

Creately Resources

⬂ The Ultimate List of Visual Risk Management Techniques

⬂ Risk Matrix Template

SMART Goal Framework

The SMART goal criteria is a structured framework used to create goals that are Specific, Measurable, Achievable, Relevant, and Time-bound. Each component of the SMART acronym helps make sure that the goal is well-defined and has a higher likelihood of being successfully achieved.

When to Use ⬊

- Setting clear objectives.
- Enhancing goal clarity.
- Monitoring progress effectively.
- Focusing on specific outcomes.
- Creating actionable plans.

S	Specific	What do you want to accomplish?
M	Measureable	How will you know when you have accomplished your goal?
A	Attainable	Is it realistic and attainable?
R	Relevant	Is this goal worth working hard for? Explain
T	Time-Specific	By when will the goal be accomplished?

Click here to use template

How to Use ⬊

1. Identify your goal: Start by clearly defining what you want to achieve. Be specific about the outcome you're aiming for.

2. Make it specific: Clearly state the goal's focus. Ask yourself who, what, where, when, and why to make sure the goal is detailed and clear.

3. Quantify measurable metrics: Determine how you'll measure progress and success. Use numbers or percentages to track your goal's achievement.

4. Assess achievability: Consider whether the goal is realistic and attainable within your resources and capabilities. Avoid setting goals that are too easy or too challenging.

5. Ensure relevance: Check if the goal aligns with your overall objectives and priorities. Make sure that achieving the goal contributes meaningfully to your larger plans.

6. Set a Timeline: Define a specific timeframe or deadline by which you aim to accomplish the goal. This creates a sense of urgency and focus.

7. Write down the SMART Goal: Craft a concise statement that incorporates all the SMART elements. Make sure it's clear, measurable, achievable, relevant, and time-bound.

8. Plan your approach: Outline the steps or actions you'll take to reach the goal. Break down the process into manageable tasks.

Creately Resources

⬊ SMART Goals Template

⬊ The SMART Guide to Streamlining Your Project Planning Process

⬊ The Easy Guide to the Goal Setting Process

SOAR Analysis

SOAR, an acronym for Strengths, Opportunities, Aspirations, and Results, serves as a tool for organizations and individuals to identify their capabilities and align those with goals and objectives. This framework explores the strengths of an organization. It also helps discover emerging opportunities. SOAR addresses aspirations and desired outcomes. This emphasis on results helps organizations to take rightful actions that align with their overall goals.

Business leaders leverage SOAR to refine corporate strategies, educators incorporate it to guide academic institutions, and individuals adopt it to shape personal trajectories.

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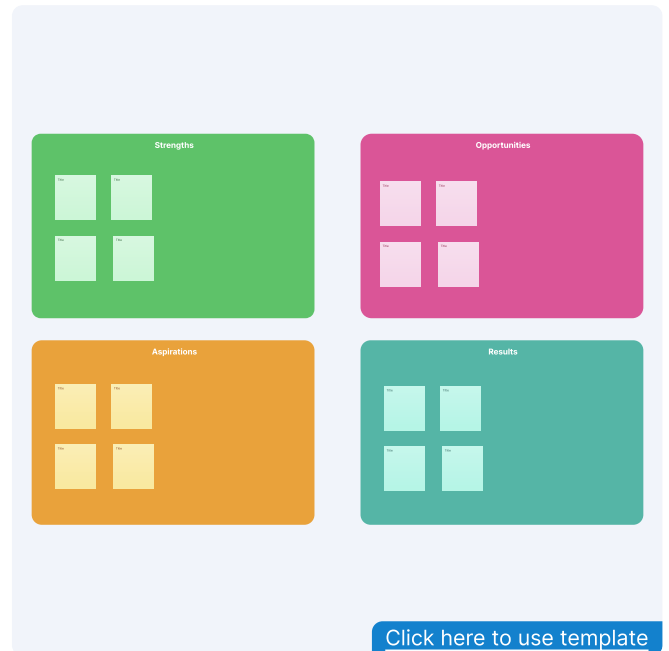
When to Use ⬂

- Identifying areas for growth and improvement.
- Building on existing assets and resources.
- Encouraging innovation and creativity.
- Developing future-oriented strategies.
- Promoting positive organizational change.

How to Use ⬂

1 Begin by identifying your organization's core strengths, encompassing talents, expertise, and unique resources. Unveil what sets you apart in the market.

2 Explore external opportunities within your industry, market trends, and evolving customer needs. Uncover potential avenues for growth and innovation.

3 Envision your desired future. Craft ambitious yet achievable goals that resonate with your organization's mission and values. Create a roadmap for progress.

4 Develop actionable strategies based on strengths and opportunities. Execute your plans diligently, tracking measurable results. Adapt as needed to ensure consistent advancement

Creately Resources

⬂ Visual Guide to Improving Organizational Performance   ⬂ SOAR Analysis
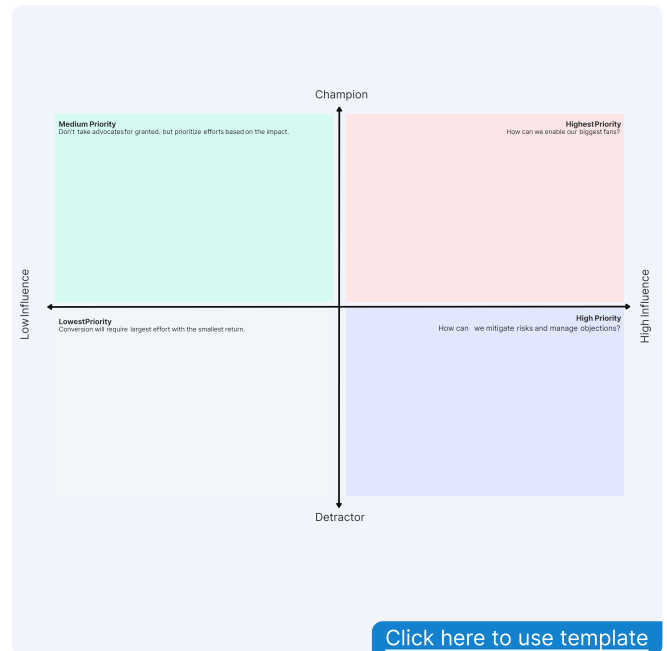
Stakeholder Map

A stakeholder map, also known as a stakeholder analysis or stakeholder matrix, is a visual tool used by businesses and organizations to identify and categorize individuals, groups, or entities that have an interest or stake in a particular project, decision, or initiative. The map helps to identify stakeholders, depict the relationships between them and the level of influence they hold over the outcome.

When to Use ⬊

- Visualizing stakeholder relationships.
- Analyzing their influence and interest.
- Prioritizing engagement efforts.
- Planning communication strategies.
- Managing stakeholder expectations.

Champion

Medium Priority
Don't take advocates for granted, but prioritize efforts based on the impact.

Highest Priority
How can we enable our biggest fans?

Low Influence

High Influence

Lowest Priority
Conversion will require largest effort with the smallest return.

High Priority
How can we mitigate risks and manage objections?

Detractor

Click here to use template

How to Use ⬊

1. Identify stakeholders: List all individuals, groups, or organizations that have an interest or influence in your project or decision.

2. Determine interest and influence: For each stakeholder, assess their level of interest in the project and their degree of influence over its outcome.

3. Categorize stakeholders: Plot each stakeholder on a grid with interest on one axis and influence on the other. This categorizes them into quadrants: High Interest/High Influence, High Interest/Low Influence, Low Interest/High Influence, and Low Interest/Low Influence.

4. Analyze priorities: Focus your attention on stakeholders in the High Interest/High Influence quadrant. Tailor your communication and engagement strategies based on the priorities of each quadrant.

5.

6. Document details: Add relevant information for each stakeholder, including their roles, expectations, concerns, and preferred communication methods.

Creately Resources

⬊ Stakeholder Analysis Example

⬊ Stakeholder Register Template

⬊ Guide to Stakeholder Management

⬊ Stakeholder Management Plan Templates

⬊ Stakeholder Engagement Plan

STEEPLE Analysis

The STEEPLE Analysis template helps organizations make decisions by evaluating the external forces shaping their environment. STEEPLE is an acronym for Social, Technological, Economic, Environmental, Political, Legal, and Ethical factors. Social aspects delve into cultural trends and societal shifts, while the Technological dimension explores innovations driving change. Economic factors focus on financial impacts, while Environmental and Ethical factors gauge sustainability and morality. Political and Legal components consider governmental influences and regulatory changes.

SOCIAL	TECHNOLOGY	ECONOMIC	ENVIRONMENTAL	POLITICAL	LEGAL	ETHICAL
EnterText	EnterText	EnterText	EnterText	EnterText	EnterText	EnterText
EnterText	EnterText	EnterText	EnterText	EnterText	EnterText	EnterText
EnterText	EnterText	EnterText	EnterText	EnterText	EnterText	EnterText
EnterText	EnterText	EnterText	EnterText	EnterText	EnterText	EnterText

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When to Use ⤵

- Assessing potential impacts on business.
- Understanding industry trends and changes.
- Planning strategic responses to external influences.
- Enhancing strategic planning and risk management.

How to Use ⤵

1. Collect data on each dimension—social trends, technological advancements, economic indicators, environmental concerns, political landscape, legal regulations, and ethical considerations.

2. Evaluate the collected data to identify trends, opportunities, and challenges within each dimension.

3. Discover intersections and correlations between dimensions. How might political decisions influence technology, for instance?

4. Craft strategies that align with the insights gained, fortifying your business against uncertainties and fostering innovation.

Creately Resources

⤵ STEEPLE Analysis Template

Strategy Map

A strategy map is a visual framework that provides a clear and concise representation of an organization's strategic goals, objectives, and the cause-and-effect relationships between them. It is designed to depict how various components of a business's strategy are interconnected and how they contribute to achieving the organization's mission and vision.

When to Use ⬊

- Visualizing strategic objectives.
- Communicating strategy clearly.
- Depicting cause-and-effect relationships.
- Monitoring progress towards goals.

STRATEGY MAP FOR ABC

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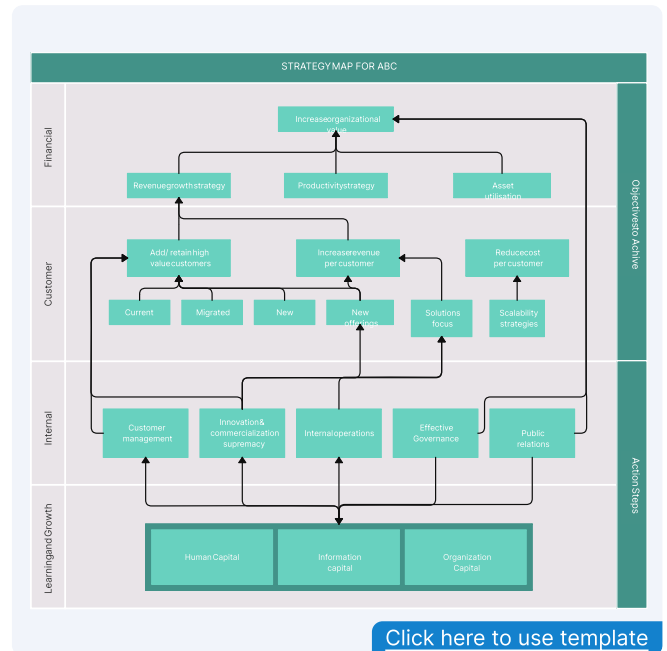
How to Use ⬊

1. Define objectives: Identify the key strategic objectives that support the organization's mission and vision.

2. Categorize perspectives: Group objectives into perspectives such as Financial, Customer, Internal Processes, and Learning & Growth.

3. Establish relationships: Determine how objectives in one perspective contribute to objectives in other perspectives.

4. Arrange hierarchically: Organize objectives within each perspective hierarchically, from high-level goals to more specific objectives.

5. Visual representation: Create a visual diagram using shapes or boxes connected by arrows to depict the relationships between objectives.

6. Review and refine: Make sure the map is coherent, aligned with the organization's strategy, and visually clear. Refine as needed to accurately convey the strategic connections.

Creately Resources

⬊ Strategy Mapping Software   ⬊ What is a Strategy Map?

Strategy Diamond

The Strategy Diamond Template is a tool used by businesses and organizations to crystalize their strategic thinking, align their goals, and drive effective decision-making. This framework, often attributed to management guru Donald Hambrick and James Fredrickson, offers a comprehensive view of a company's strategy by breaking it down into five key elements: Arenas, Vehicles, Differentiators, Staging, and Economic Logic.

When to Use ⬇

- Developing new strategies.
- Reviewing or refining an existing strategy.
- Creating communication strategies.
- Responding to changing market conditions.

Arenas
(Where will the brand have an active presence? This can be both online and offline channels as well as where products will be placed)

Staging
(What will be our speed and sequence of moves?)

Economic Logic
(Explain how returns will be obtained)

Vehicles
(What modes of sales partnerships or methods will we use to get there?)

Differentiation
(How will we win?)

Click here to use template

How to Use ⬇

① Arenas: Start by identifying the broad market spaces or arenas where your organization competes. This could involve geographical locations, product lines, customer segments, or distribution channels. Define the boundaries of your strategic scope.

② Vehicles: Determine the key strategic vehicles your organization will use to compete in the chosen arenas. These could be specific products, services, or technologies. Assess their potential for success and alignment with your overall strategy.

③ Differentiators: Pinpoint the unique attributes and differentiators that set your offerings apart from competitors. This step is crucial for creating a compelling value proposition and building a sustainable competitive advantage.

④ Staging and Economic Logic: Outline the sequence of actions (staging) required to achieve your strategic objectives. Additionally, clarify the underlying economic logic of your strategy, addressing how your chosen vehicles and differentiators will create value for your organization.

Creately Resources

↘ Strategy Diamond

↘ How to Visualize an Organizational Strategy

↘ The Top 7 Tried and Tested Strategy Frameworks for Businesses
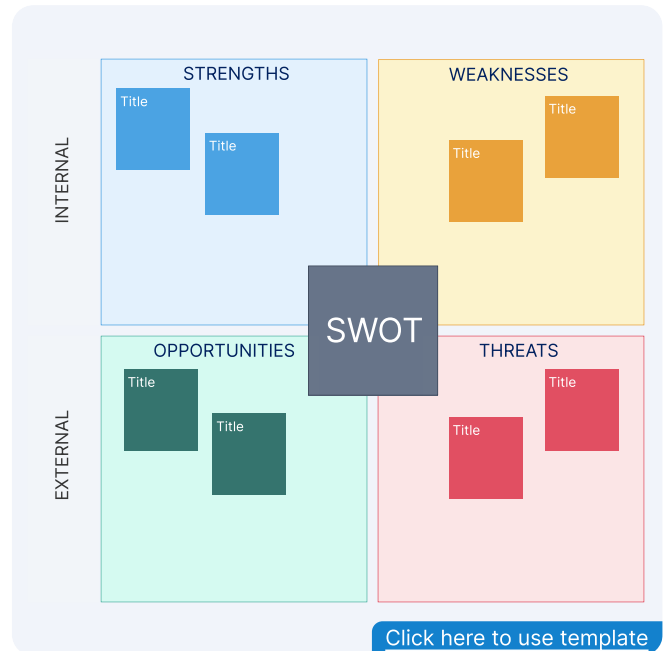
SWOT Analysis

A SWOT analysis is a strategic planning tool used by individuals, teams, or businesses to assess their current situation. SWOT stands for Strengths, Weaknesses, Opportunities, and Threats. SWOT analysis guides businesses in crafting effective strategies, making informed decisions, and adapting to changing environments, ultimately driving success and growth.

When to Use ⤵

- Assessing business strategies.
- Evaluating a project's viability.
- Understanding market positioning.
- Developing action plans.
- Considering new ventures or changes.

INTERNAL

STRENGTHS
Title
Title

WEAKNESSES
Title
Title

SWOT

EXTERNAL

OPPORTUNITIES
Title
Title

THREATS
Title
Title

Click here to use template

How to Use ⤵

1. Gather information: Collect data and insights about your business, project, or situation (i.e. internal assessments, market research, & competitor analysis).

2. Identify strengths and weaknesses: List your internal strengths and weaknesses. These are aspects you have control over and can work on to improve your position.

3. Identify opportunities and threats: List external opportunities and threats that could impact your objectives. These are factors you can't control, but you can prepare for or leverage.

4. Combine insights: Examine the relationships between your internal factors and external factors. For example, how can you use your strengths to seize opportunities, or how can you address weaknesses to mitigate threats?

5. Develop strategies: Based on your analysis, develop strategies that use your strengths to seize opportunities, address weaknesses to minimize threats, and so on.

6. Prioritize and take action: Rank the factors within each category in terms of their importance and impact. Focus on the most critical ones when developing your strategies.

Creately Resources

⤵ SWOT Analysis Tool

⤵ 30+ SWOT Analysis Templates and Examples for Any Situation

⤵ What is SWOT analysis and How to do a SWOT analysis

⤵ Personal SWOT Analysis: Where Talent Meets Opportunity

Value Chain Analysis

A value chain analysis template is a tool that businesses can use to identify and improve the activities that create value for their customers. It is a visual representation of the company's operations, broken down into primary activities (inbound logistics, operations, outbound logistics, marketing and sales, and service) and support activities (procurement, technology development, human resource management, and firm infrastructure).
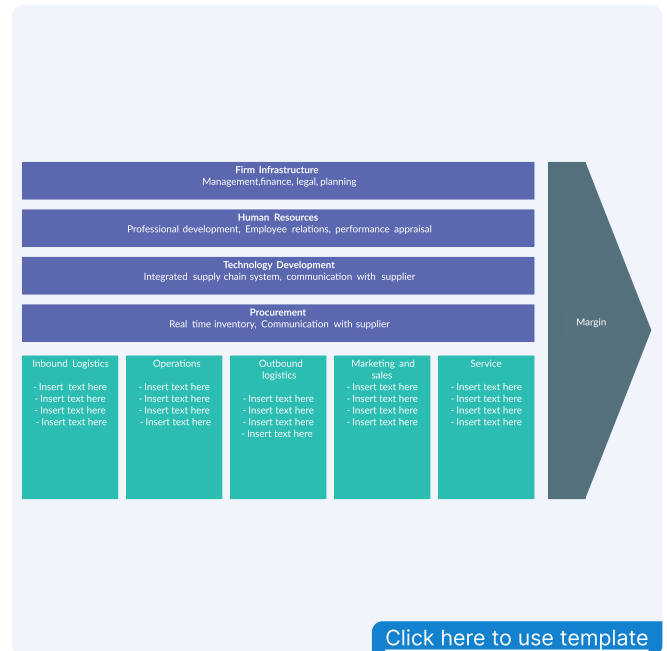
When to Use ⬂

- Analyzing a company's internal activities.
- Identifying opportunities for cost reduction
- Assessing areas for process improvement.
- Evaluating competitive advantage sources.
- Aligning activities with strategic goals

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How to Use ⬂

1. Begin by visualizing your organization's value activities – from inbound logistics to marketing and beyond. This clear bird's-eye view lays the foundation.

2. Pinpoint crucial activities contributing to costs and differentiation. What sets you apart? What can be streamlined?

3. Assess each activity's efficiency. Are there innovative technologies or processes that can boost productivity?

4. Armed with insights, craft strategies that align with your findings. Enhance customer experiences, optimize costs, and cement your market position.

Creately Resources

What is Value Stream Mapping?

How to Successfully Achieve and Sustain Competitive Advantage

The Top 7 Tried and Tested Strategy Frameworks for Businesses

Value Proposition Canvas

The value proposition canvas helps organizations to align their products and services with what the customer values and needs. It is divided into two blocks as follows.

Customer Profile

- Gains: Needs and the benefits that a customer expects. What would delight the customer.
- Pains: Negative emotions that a customer experiences when getting something done.
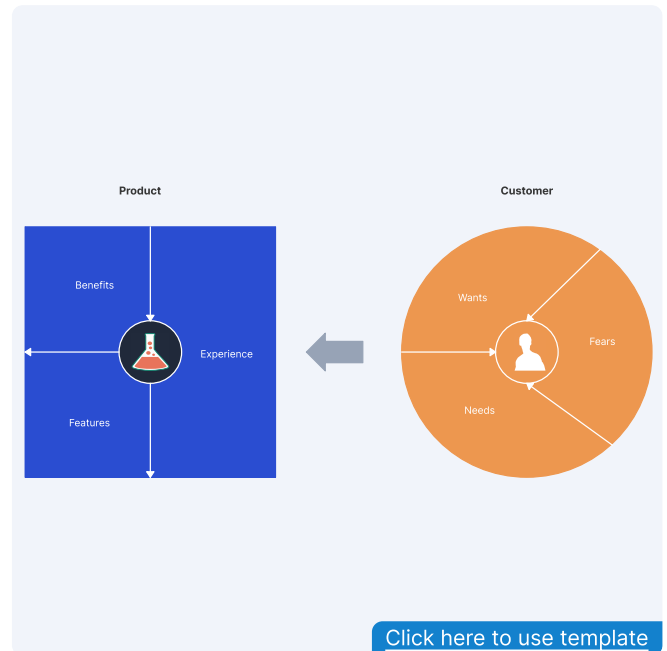- Customer jobs: The needs they are trying to satisfy and the problems they are trying to solve.

Value Map

- Gain creators: How the product adds value to customers and how it creates customer gains.
- Pain relievers: How does the product alleviate customer pains?
- Products and services: The products and services that add value to the customer while creating gains and alleviating pains.

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Creately Resources

↘ Guide to Building an Effective Go-to-Market Strategy

↘ Ultimate List of Business Analysis Models

When to Use ↘

- Assess and optimize resource allocation
- Evaluate competitive advantage
- Identifying competitive weaknesses
- Make market entry Decisions
- R&D and innovation

How to Use ↘

1. Identify your target audience. Define their jobs, pains, and gains they seek.

2. Map your products to customer needs. Highlight how you alleviate their pains and amplify their gains.

3. Analyze what customers crave and how your offerings satisfy those cravings.

4. Continuously enhance your value proposition by refining your canvas based on feedback and insights.

VRIO Analysis

Entrepreneurs, managers and strategists use VRIO analysis to identify competitive advantages within businesses. It helps evaluate organizations' resources based on four dimensions: Value, Rarity, Imitability, and Organization. This method reveals a company's unique strengths, resources and areas for improvement.

VRIO Analysis transforms insights into actionable strategies. Whether you're refining your product's distinctiveness or amplifying your market presence, VRIO helps your business achieve strategic success.

Resources	Is it Valuable?	Is it Rare?	Is it Hard to Imitate?	Are We Organized to Capture Value?	Recommendations
Resource1					
Resource2					
Resource3					
Resource4					
Resource5					
Resource6					

Click here to use template

When to Use ⭧

- Assess and optimize resource allocation
- Evaluate competitive advantage
- Identifying competitive weaknesses
- Make market entry Decisions
- R&D and innovation

How to Use ⭧

1. List your company's key tangible and intangible resources.

2. Determine to what extent they add value and if they're rare in the market.

3. Analyze how easy it is for competitors to replicate these resources.

4. Create an operational structure that will help your organization to effectively leverage these resources.

Creately Resources

⭧ VRIO Analysis

⭧ Top 7 Tried and Tested Strategy Frameworks for Businesses

5 Whys Analysis

Five Whys Analysis is a structured method that helps to uncover the fundamental "whys" behind a problem. By iteratively asking "why" five times, it reveals underlying factors contributing to an issue, which are otherwise obscured on the surface. Whether you're an engineer, manager, or a project leader, the 5 Whys Analysis empowers you to pinpoint the root causes of a problem.

When to Use ⬇

- Investigating root causes of problems.
- Uncovering underlying issues or factors.
- Identifying systemic reasons for failures.
- Promoting deeper understanding of issues.
- Developing effective corrective actions.

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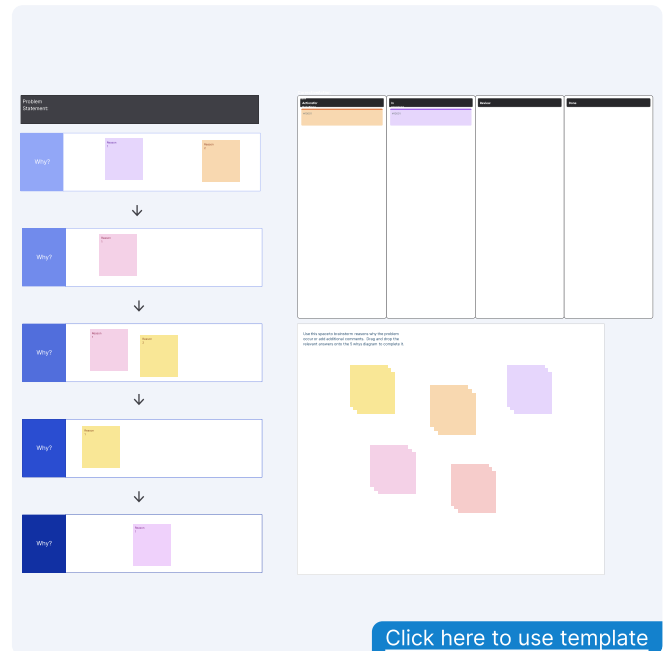
How to Use ⬇

1. Clearly define the problem you're facing, ensuring everyone is on the same page.

2. Probe the initial problem with "Why?" questions. Continuously dig deeper, unraveling the layers of causation. Repeat this step at least five times.

3. Synthesize the "Whys" to pinpoint the root cause. This deep understanding paves the way for targeted solutions.

4. Armed with a precise understanding, enact corrective measures. Monitor outcomes and refine as needed.

Creately Resources

⬇ Effective Problem-Solving Through Root-Cause Analysis

⬇ Guide for Efficient Business Problem-Solving
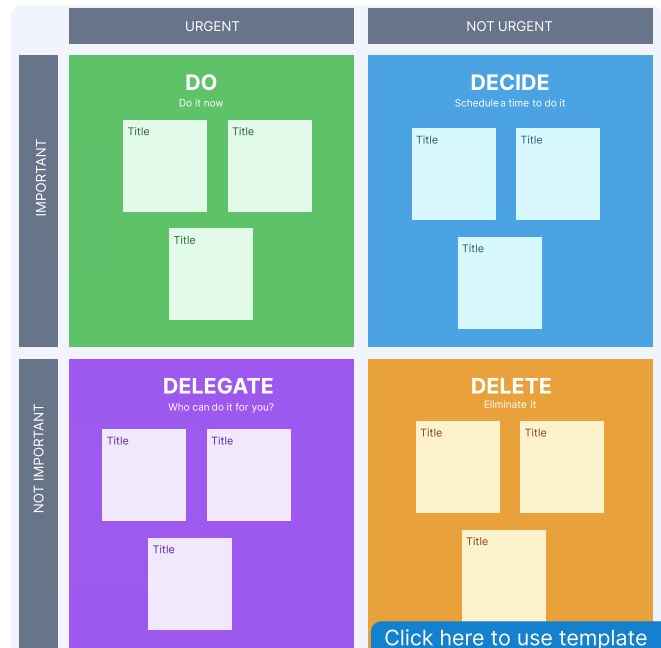
⬇ 13 Decision-Making Techniques and Tools for Business

Eisenhower Matrix

The Eisenhower matrix, also known as the urgent-important matrix, is a simple tool for prioritizing tasks and making effective decisions about how to spend your time. It helps you categorize tasks based on their urgency and importance, allowing you to focus on what matters most. It was popularized by Dwight D. Eisenhower, the 34th President of the United States.

When to Use ⤵

- Prioritizing urgent tasks
- Allocating resources for important goals
- Streamlining delegation & project planning.
- Aligning activities with strategic objectives

	URGENT	NOT URGENT
IMPORTANT	**DO** Do it now	**DECIDE** Schedule a time to do it
NOT IMPORTANT	**DELEGATE** Who can do it for you?	**DELETE** Eliminate it

Click here to use template

How to Use ⤵

1. Create the Eisenhower matrix: Draw a grid with four quadrants or use a pre-made Creately template to get a head start.
   - **Urgent and Important (Quadrant 1)**: Tasks that are both urgent and important go here. These are top priorities and need immediate attention.
   - **Important but Not Urgent (Quadrant 2)**: Tasks that are important but not urgent. These tasks contribute to your long-term goals and should be scheduled to avoid becoming urgent later.
   - **Urgent but Not Important (Quadrant 3)**: Tasks that are urgent but not important are placed here. These tasks can often be delegated or minimized to free up more time for Quadrant 1 and 2 tasks.
   - **Neither Urgent nor Important (Quadrant 4)**: Tasks that are neither urgent nor important. These tasks are distractions and should be minimized or eliminated.

2. Prioritize and act: Start with Quadrant 1 tasks, as they need immediate attention. Move on to Quadrant 2 tasks, as these impact your goals. Delegate or minimize Quadrant 3 tasks, and avoid Quadrant 4 tasks.

3. Regular review: Review regularly +-and update your Eisenhower matrix. Tasks can shift between quadrants as circumstances change.

Creately Resources

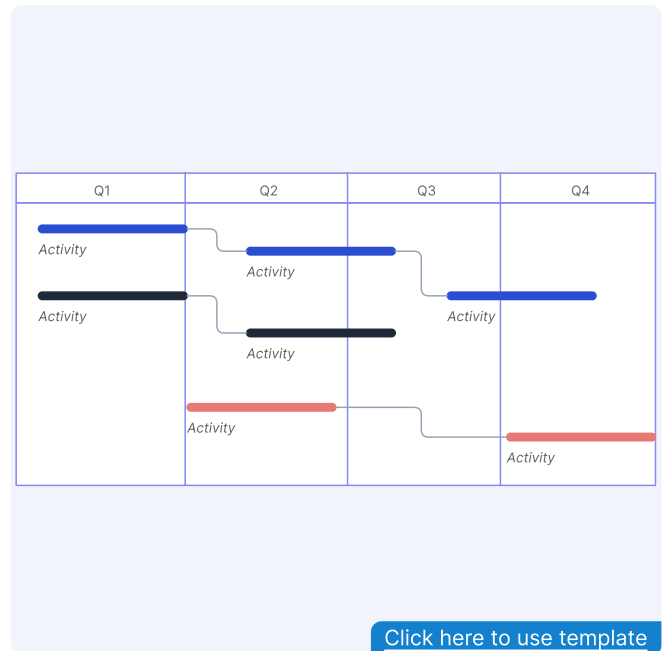⤵ Eisenhower Matrix Template   ⤵ Eisenhower Matrix Examples

Gantt Chart

A Gantt chart is a visual tool used in project management to plan, schedule, and track tasks and activities over a specific period of time. It shows a graphical representation of a project's timeline, highlighting the start and end dates of various tasks or activities, their dependencies, and the overall progress of the project.

When to Use ⤵

- Visualizing task timelines.
- Tracking task dependencies.
- Monitoring progress.
- Allocating resources.
- Managing project timelines.
- Communicating project status.

	Q1	Q2	Q3	Q4
	Activity			
	Activity	Activity		
		Activity	Activity	
		Activity		
		Activity		
				Activity

Click here to use template

How to Use ⤵

1. Identify tasks: List all the tasks and activities required for your project. Break down large tasks into smaller, manageable subtasks.

2. Timeline setup: Create a timeline along the horizontal axis, representing the project's start and end dates. Assign tasks to their respective timeframes by plotting horizontal bars.

3. Identify task dependencies: Identify the tasks that must be completed before others can begin – and connect them on the chart. Make sure the sequence is clear to avoid bottlenecks.

4. Bar length and milestones: Adjust the length of each task's bar to reflect its duration. Add vertical lines to represent significant milestones or deadlines.

5. Allocate resource: Assign responsible team members to each task. Make sure that team members are not overloaded and that dependencies are considered.

6. Monitor and update: Update the Gantt chart regularly to reflect actual progress. As tasks are completed, adjust the bars accordingly, and note any delays.

Creately Resources

⤵ Gantt Chart Maker

⤵ Gantt Chart Templates to Instantly Create Project Timelines

⤵ Draw Gantt Charts Online Easily Using Creately

⤵ Using Gantt Charts and Flowcharts in Project Planning

Workflow Diagram

A workflow diagram is a visual tool that illustrates the sequence of steps, tasks, activities, or processes required to complete a specific project, task, or operation. It provides a clear and concise overview of how work flows from one stage to another, highlighting the relationships and dependencies between different elements of the process.

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When to Use ⤵

- Mapping task sequences.
- Clarifying work procedures.
- Identifying bottlenecks.
- Streamlining operations.
- Communicating workflows.
- Analyzing process efficiency.
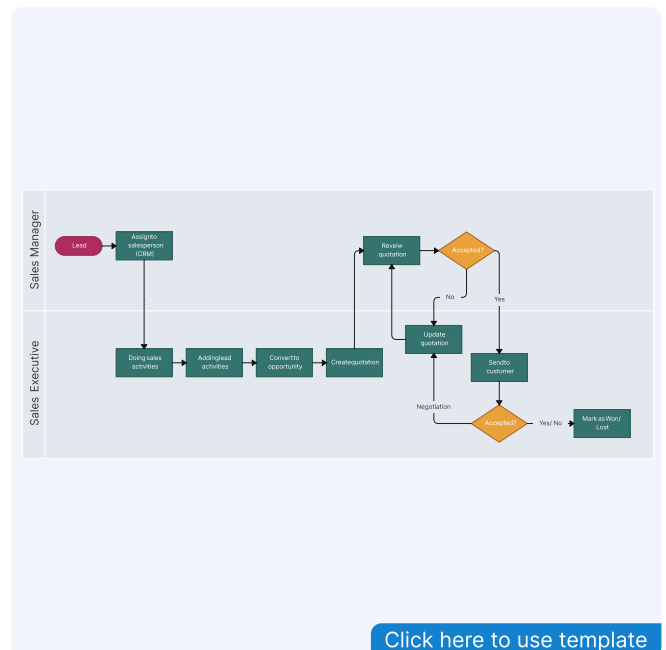
How to Use ⤵

1. Define process and goals: Clearly define the specific process you're diagramming. Understand the objectives of the process and define its starting and ending points.

2. Gather information: Identify all the tasks, activities, and decision points. Gather information about the sequence in which tasks occur, the inputs required for each task, the outputs produced, and any decision-making factors.

3. Draw the diagram: Using the specific workflow diagram shapes, create the diagram to visualize the workflow.

4. Show inputs, outputs, and relationships: Use arrows to show which inputs are needed for each task, entering the respective task shapes. If certain tasks are dependent on others or have specific relationships, show these connections with arrows.

5. Review, refine, share: Review the diagram for accuracy, clarity, and logical sequencing. Make necessary refinements, adjusting shapes, labels, or connections as needed.

Creately Resources

⤵ Workflow Diagram Software   ⤵ What is a Workflow? A Simple Guide with Editable Templates

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