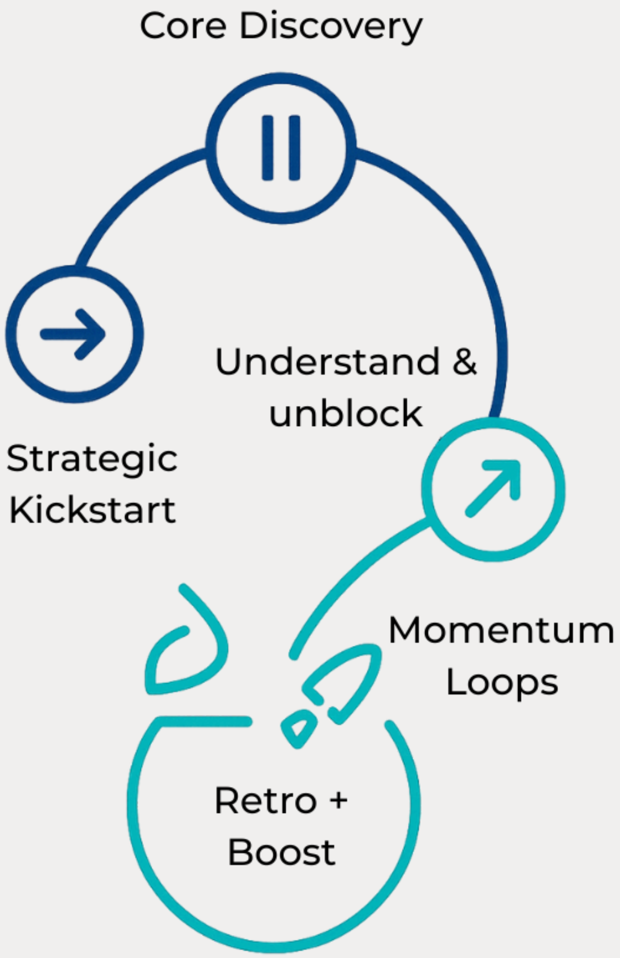
The Fast, Strategic Framework for Results-Driven Teams



The Core Impact Framework Lite™

Created by Maldicore
Empowering Business. Transforming Futures.

Table of Contents

Maldicore Core Impact Framework Lite

In today's fast-paced world, time is everything. **Clients want results yesterday.** Teams are expected to move quickly, adapt constantly, and deliver value fast—without sacrificing quality or clarity. That's where **MCIF Lite** comes in.

MCIF Lite is a streamlined version of the **Maldicore Core Impact Framework™**, carefully designed for rapid, high-impact projects like **websites**, **apps**, **software**, **brand launches**, and **product builds**. It offers just the right balance between strategic thinking and tangible execution—so you get speed without chaos, and structure without bureaucracy.

Developed through r**eal-world trial**, **client feedback**, and **years of cross-industry experience**, MCIF Lite helps teams cut through the noise and focus on what matters most: smart decisions, visible progress, and meaningful outcomes.

Whether you're a startup founder launching your first product, a creative agency building out a brand, or a team tasked with delivering fast transformation—MCIF Lite gives you a practical path from insight to impact in a matter of days, not months.

This guide is your **hands-on walkthrough** of the MCIF Lite process. It uses simple language, zero jargon, and real deliverables to help you and your team collaborate better and move faster—while still doing work you're proud of.

This guide is designed to help you move fast, think clearly, and build with intention. Whether you're using MCIF Lite on your own, with a team, or alongside Maldicore advisors—we hope it brings you clarity, momentum, and results.

So take a deep breath, trust the process, and dive in.

You've got this—and we're rooting for your success.

How to Use This Guide

This guide is designed to help you apply the **Maldicore Core Impact Framework Lite (MCIF Lite)** quickly and effectively—whether you're launching a product, designing a website, or making a strategic business decision.

Step-by-Step Navigation

Move through each of the **five core stages** in order:

1. **Strategic Kickstart**
2. **Understand & Unblock**
3. **Clarity to Concept**
4. **Momentum Loops**
5. **Retro + Boost**

Each section explains:

- What happens
- What you get
- Why it matters
- Tools and examples you can use immediately

Use It Your Way

- Follow the **whole framework** in a sprint, or **jump into the section** that fits your current challenge.
- **Customize** everything to match your project size, speed, and team.
- For client-facing projects, share templates or visuals from the **appendix**.

Need Help?

You're welcome to use MCIF Lite independently—but if you'd like expert guidance, our team is happy to assist with facilitated workshops, tailored strategy sprints, or full implementation.

📩 Contact us: **support@maldicore.com** 🌐 Visit: maldicore.com

Who This Guide Is For

MCIF Lite is for **makers, founders, teams, and advisors** who need **strategic clarity—fast**. Whether you're solo or leading a project, this guide helps you move from ideas to results without overthinking.

Best Suited For:

- **Startup founders** launching MVPs or new offerings
- **Product & UX teams** shaping features or flows
- **Marketing & brand teams** structuring campaigns or rollouts
- **Consultants & advisors** needing a repeatable, light-touch framework
- **Agile teams** who want traction—not long slides
- **Client-facing leads** aligning fast with decision-makers

Use it for: designing websites, building apps, shaping strategy, or running lean sprints.

This Guide Is Not For

MCIF Lite is **not ideal** for complex, enterprise-wide or regulatory-heavy use cases.

Not Recommended If You're:

- Leading **enterprise transformation** across multiple units
- Needing **tech architecture plans** or development specs
- Preparing **financial audits or legal reviews**
- Building **academic research** or long policy reports
- Seeking a **turnkey solution** with zero team input

MCIF Lite is about **speed, structure, and clarity**—not exhaustive planning or heavy governance.

🔍 For deeper strategy or large-scale engagements, contact **support@maldicore.com** to explore the full **Maldicore Core Impact Framework™**.

The 5-Stage MCIF Lite Sprint

MCIF Lite is built around five focused, action-packed stages, each designed to keep momentum high and clarity sharp:

1. Strategic Kickstart (0.5–1 Day)

A lightning-fast discovery sprint to clarify your goals, your users, and your project's launch point.

2. Understand & Unblock (1 Session)

Identify your biggest friction points, surface opportunities, and uncover what's slowing you down.

3. Clarity to Concept (1 Day)

Co-create the roadmap, wireframe, or MVP direction that turns your strategy into something real and buildable.

4. Momentum Loops (Rolling)

Execute in high-speed bursts. Launch landing pages, test features, roll out content—keep delivering week by week.

5. Retro + Boost (1–2 Hours)

Wrap up with a performance review, highlight what worked, and explore your path to scale or phase two.

1. Strategic Kickstart

Duration: 0.5–1 Day

What Happens

The Strategic Kickstart is where momentum begins. It's a lightning-fast discovery sprint designed to get everyone on the same page—clearly, quickly, and confidently.

In this stage:

- We ask a few smart, focused questions about your vision, goals, audience, and challenges.
- You fill out a short pre-discovery form or hop on a 30-minute alignment call—whichever works best for your team.
- We listen, guide, and distill everything into clear, actionable goals, written in plain language with no jargon.
- We identify what "done" looks like, who your users are, and what success means in your context.

This step isn't about overthinking—it's about unlocking clarity so everything that follows moves faster and smarter.

Why It Matters

Many teams jump into execution without truly aligning on purpose, users, and outcomes. This often leads to delays, pivots, or even rebuilding.
The Strategic Kickstart avoids that by surfacing the essentials early—saving time, energy, and money down the line.

> "That 30-minute call saved us three weeks of guessing. We saw our brand differently the moment the brief came back."
> — *Client at a global wellness startup*

What You Get

By the end of the Strategic Kickstart, you'll receive a Launch Readiness Brief:

- A 2–3 slide summary of your goals, user profile, project boundaries, and success signals
- A quick visual of your project's North Star and possible friction points
- A solid foundation to build from, whether it's a website, product, campaign, or service

What We Use

- **Mini Discovery Canvas (Lite)** – to capture mission, value, target, challenge, and vision in one place
- **Quick Stakeholder Map** – to understand who's involved and who should be
- **Business Snapshot Tool** – a single-slide snapshot of how your business works (or will work)

Kickstart Checklist

Before we move to the next phase, we make sure these are done:

- Clear project goals identified and confirmed
- Primary target audience defined
- Success criteria outlined in plain language
- Key stakeholders identified
- Pre-discovery form completed or call held
- Launch Readiness Brief delivered and signed off

2. Understand & Unblock

Duration: 1 session (60–90 minutes)

What Happens

This stage is where we shift from clarity to traction. After getting a clear vision in the Strategic Kickstart, we move straight into surfacing what's in your way—and what can move you forward fastest.

- We run a focused, fast-paced working session with your key team members.
- Together, we map out bottlenecks, friction points, and known risks—across people, tech, process, or decisions.
- We use 80/20 thinking: What's the one thing, if solved or unblocked, that will create the most momentum?
- We identify quick wins you can act on immediately and deprioritize distractions that slow you down.
- Our advisors come prepared with real-world patterns—so even if you're stuck, we help you name it and frame it.

Think of this session like clearing the fog on a mountain trail—you'll still have work ahead, but now you'll know where to place your next step.

Why It Matters

Every project—no matter how simple or complex—faces hidden blockers. These aren't always obvious. They can be buried in slow decision-making, tech overwhelm, unclear roles, or unspoken misalignments.

Left unchecked, these issues quietly drain energy, inflate costs, and delay launch. This stage helps us uncover and address them before they become expensive mistakes.

> "I didn't realize our biggest problem was internal clarity. This 90-minute session unlocked 3 months of confusion."
> *— Founder, digital fashion platform*

What You Get

By the end of the session, you'll receive a clear, visual Action Brief:

- 3 core issues clearly defined
- 1–2 quick wins or workarounds you can apply right away
- A simple prioritization heatmap or action grid
- Any red flags or risks that need escalation or decision

It's not a report—it's a decision-making tool for what to do next, fast.

What We Use

- **KPI Gap Grid** – to quickly assess where performance is breaking down
- **Blocker Radar** – fast visual to rank obstacles by urgency & impact
- **Heatmap Tool** – to show where action is needed most
- **Quick Win Box** – to identify 1–2 changes that deliver high impact with low effort

---

Checklist: Before We Move On

- 3 blockers identified and named
- 1 quick win agreed and assigned
- Top risk or uncertainty acknowledged
- Heatmap or Radar completed
- 1-page Action Brief delivered to client
- Team alignment on next immediate action

3. Clarity to Concept

Duration: *1 Day (or split into 2 half-day sessions)*

What Happens

This is where your idea becomes real.

After identifying what's working and what's holding you back, we now shift into collaborative creation mode. In one focused day, we help you co-create the structure, flow, and core shape of your product, brand, website, app, or solution.

- We turn insights into wireframes, product flows, or brand storyboards in real-time.
- We use visual tools, live whiteboarding, and collaborative design thinking exercises to translate ideas into action.
- The session is not theoretical. You will see your project start to take form in front of you.
- We explore "what to build first," "what to leave out," and "how to show value quickly."

This session feels creative, exciting, and energizing—it's where vision becomes a blueprint.

Why It Matters

Clients and teams often get stuck in the "talking about it" phase. They have goals, some strategy, maybe even a to-do list—but no actual structure to execute.

This stage removes the ambiguity and answers questions like:

- What are we actually building?
- What comes first?
- How should it look, feel, or function?
- Where does the user begin?

Without this phase, teams often build the wrong thing, or build too much, too soon. Clarity to Concept ensures focus and alignment.

> "We left that session with a visual plan, a landing page design, and a to-do list we could act on the same day."
> — *Creative Director, travel platform*

What You Get

You walk away with a Build Blueprint that may include:

- A UX storyboard or product/user journey
- Wireframes or low-fidelity mockups
- MVP features mapped into Must / Should / Could
- Suggested tools, platforms, or design components
- A 7-Day Action Plan to immediately begin execution

Even if you're not a designer or product person, you'll understand your concept—clearly, visually, and confidently.

What We Use

- **Strategy Canvas** + **UX Flowboard** – for aligning vision with user experience
- **Live Wireframe Tools** – Figma, FigJam, or Miro (or whiteboard if offline)
- **MVP Pyramid** – to prioritize features that deliver value fast
- **3 Concept Paths** – a visual voting system to explore design or feature options
- **Naming & Narrative Module** **(if needed)** – for positioning or branding alignment

---

Checklist: Before We Move On

- Key user journeys mapped
- Wireframes or flowcharts created
- MVP features selected and categorized
- 7-Day Action Plan drafted and assigned
- Alignment confirmed on next sprint or delivery milestone
- Blueprint delivered to all stakeholders

4. Momentum Loops

Duration: Ongoing (in 3–7 day bursts or weekly sprints)

What Happens

This is the phase where we shift into execution mode—but not with one big, risky launch. Instead, we move in tight feedback-driven loops that deliver tangible progress in short, repeatable cycles.

- We launch a real deliverable every few days—it might be a live webpage, a clickable prototype, a visual preview, a backend feature, or even a new booking flow.
- Every loop is focused on one meaningful outcome: shipping something useful.
- You get regular updates, usually 5–10 minutes long: *"Here's what's done. Here's what's next."*
- We adapt with speed: each sprint is adjusted based on user feedback, team insight, or metrics.
- These loops keep you in control—and your stakeholders excited.

This phase is all about visible, trackable momentum, not abstract roadmaps or long waits.

Why It Matters

Most teams stall after the planning phase. The “big build” gets bloated, teams lose steam, clients get nervous, and trust erodes.

Momentum Loops flip that model—by delivering in fast, digestible releases:

- Stakeholders stay engaged
- Priorities stay current
- Feedback loops stay alive
- Progress is measurable, not theoretical

> “Every Friday, we had something new to test or show the team. It made the whole process feel alive and moving.”
> — *Head of Product, healthtech startup*

What You Get

- A living, breathing build—your brand, product, or platform evolves in real time.
- Short weekly recaps or demo recordings via Loom, Zoom, or Notion.
- Client-accessible progress board (Trello, Notion, or ClickUp).
- A constantly evolving “What’s Live / What’s Next” dashboard.

Each loop ends with a micro-retro: what’s working, what needs adjustment, and what’s coming next.

What We Use

- **Execution Canvas (Lite)** – to plan & track visible outcomes
- **Kanban or Sprint Boards** – (ClickUp, Trello, Notion, or Jira if needed)
- **Feature & Design Drop Schedule** – mapped and visible to you
- **Loom Updates** – short, human progress updates
- **Usability Test Tracker** – (if testing is in scope)

Momentum Loop Examples

- **Week 1:** Landing page + brand headline test
- **Week 2:** First working prototype of a booking flow
- **Week 3:** Newsletter signup + welcome automation
- **Week 4:** Visual redesign of homepage above-the-fold
- **Week 5:** Onboarding sequence or welcome video

Checklist: What We Confirm in Every Loop

- Deliverable shipped or demo-ready
- Feedback gathered or testing completed
- Stakeholders updated (via call, message, or Loom)
- Next item confirmed and started
- Any blockers flagged and assigned

5. Retro + Boost

Duration: *1–2 Hours*

What Happens

This final stage is where we hit pause—not to slow down, but to zoom out and assess what we've built, how it performed, and what's next.

- We lead a structured retrospective session with your team to reflect on the project journey.
- **We ask:** *What worked well? What could've been smoother? What did we learn that will shape the next move?*
- We run a light audit of your deliverables—the website, app, platform, or brand—and share ways to strengthen, streamline, or scale them.
- You get options: improve what's live, expand into Phase 2, or hand it off to your internal team with clarity.

This stage feels energizing—it's about celebrating progress and unlocking the next level of growth.

Why It Matters

Most projects fizzle out after launch. Teams either jump to the next thing too fast, or lose momentum altogether. Retro + Boost ensures that your success becomes a platform, not a peak.

It's also where teams:

- Identify internal strengths to keep using
- Acknowledge friction to avoid next time
- Spot scaling potential hidden in MVP builds
- Feel a sense of closure, confidence, and clarity

> "The audit gave us more than just fixes—it revealed how to grow. That 1-hour session redefined our roadmap."
> *— Founder, e-learning startup*

What You Get

- A Scalability Snapshot or Optimization Report that outlines:
  - What's performing well (design, tech, UX, data)
  - What needs refining
  - What's ready to scale
- A "Phase 2 Launchpad" with options for:
  - Advanced features
  - Marketing systems
  - Automation and analytics
- Optional handover materials if you're transitioning in-house

You can treat it as a handoff point or a launchpad for your next sprint—it's completely modular.

What We Use

- **Feedback Radar** – collects input from internal team, users, and stakeholders
- **Performance Checklist** – used for quick tech, UX, and brand audits
- **Growth Loop Canvas (Lite)** – for future readiness and scale planning
- **ESG/UX Alignment Tracker** – if sustainability or impact goals are in play

---

Examples of Boost Opportunities

- Your MVP landing page converts well → let's A/B test it
- Your product has early traction → build referral flow or onboarding automation
- Your brand visuals resonated → build your full design system or content kit
- Your team was efficient → assign core elements to internal workflows

---

Checklist: What's Included at Wrap-Up

- Retro session completed with full team or decision-makers
- Performance snapshot reviewed (UX, tech, content, data)
- Key takeaways and growth levers identified
- Optimization or Phase 2 roadmap created (high-level)
- Scalability Snapshot or Optimization Report delivered
- Next steps confirmed or handover completed

Flexibility Built In

MCIF Lite is not rigid. It's built for momentum. You'll notice:

- Obvious or publicly available inputs—like company mission, tagline, or existing user segments—can be pre-filled without client meetings. This saves everyone time and ensures discovery time is focused on real gaps.
- At times, 2–3 successive actions within a stage can be combined or run simultaneously, especially for lean teams or fast projects. For example:
    - Wireframing and naming exploration can be merged in one sprint
    - Execution planning and client feedback can overlap in parallel loops
    - Early analytics and usability testing can run concurrently

Need Help Implementing MCIF Lite?

MCIF Lite is open-source in spirit. It's yours to explore, adapt, and implement—however you like. We designed it that way because we believe better tools should be shared, not hidden behind complexity.

But if you'd like expert support in bringing it to life—whether for a brand launch, a product build, a campaign, or even a digital transformation—we're here to help.

Our Advisors can walk beside your team, adapt MCIF Lite to your workflow, and ensure you get results fast.

- **Email:** support@maldicore.com
- **Web:** maldicore.com

Let's co-create something brilliant—and do it at the speed of clarity.

Appendix: Tools We Use

(MCIF Lite Toolkit)

Welcome to the **Appendix Section** of the MCIF Lite Guide.

While the main guide walks you through the *thinking* and *flow* of each stage, this section gives you the *doing* side of the framework. Inside the appendix, you'll find a curated collection of **practical tools, canvases, templates, and visual aids** used across the MCIF Lite process.

These are the very same tools we use in live projects—adapted to be **actionable, lightweight, and client-friendly**.

What You'll Find Here:

- **Discovery Canvases** for capturing mission, audience, and business models
- **Mapping Tools** for stakeholders, KPIs, blockers, and opportunity heatmaps
- **Planning Frameworks** like the MVP Pyramid and Execution Canvas
- **Retro Tools** for usability testing, performance audits, and feedback loops
- **Growth Planning Templates** to guide next steps and strategic expansion

Each tool includes:

- What it is
- Why we use it
- When and how to apply it
- Examples and tips
- Editable versions (inhouse version)

You can use these as-is or customize them to your team's needs. They're designed to be simple, visual, and highly adaptable for fast-moving environments—just like MCIF Lite.

Let's dive into the toolkit.

Mini Discovery Canvas (Lite)

Stage: *Strategic Kickstart*

What It Is

The Mini Discovery Canvas (Lite) is a single-page, high-clarity framework designed to surface the most essential elements of a project—quickly and visually. It distills the strategy, scope, and context into a snapshot, helping teams align in under 30 minutes.

It covers:

- **Mission** – Why this exists
- **Value** – What outcome it promises
- **Target** – Who it's for
- **Challenge** – What problem it solves
- **Vision** – What success looks like in the long run

Why We Use It

In the early stages of any fast-paced project, teams often lack alignment on fundamentals. The Mini Discovery Canvas helps:

- Bring all voices to the table early
- Eliminate ambiguity about purpose
- Anchor decisions in shared understanding
- Replace long kickoff meetings with visual clarity

It's particularly useful when:

- Time is tight
- Teams are cross-functional or remote
- The client doesn't yet have a strategic document

How It's Used

1. **Facilitation:** Run a short 30–45 min workshop or call using this canvas.
2. **Co-Creation:** Guide stakeholders through each box—live or asynchronously.
3. **Summarization:** Refine and share the completed canvas as a reference doc.
4. **Conversion:** Use it to shape the Launch Readiness Brief or Discovery Summary.

Sample Use Case

Project: New booking platform for eco-conscious travelers

- **Mission:** Make sustainable travel more accessible and visible
- **Value:** Save time, reduce decision fatigue, and discover certified eco-stays
- **Target:** Millennials and Gen Z travelers (ages 22–38)
- **Challenge:** Overwhelm and greenwashing in current booking options
- **Vision:** A trusted ecosystem of curated, vetted, bookable green properties

This snapshot then fuels the roadmap, content voice, branding, and feature set.

Template (Visual Layout)

MISSION Why does this project exist? What problem does it solve at its core?	**VALUE** What is the key benefit or transformation we provide the user?
TARGET Who is this for? Who benefits or uses it?	**CHALLENGE** What's broken, missing, hard, or confusing?
VISION What does success look like if this works perfectly? What future are we creating or enabling?	

Pro Tips

- Print it on A3 for in-person sessions.
- Use sticky notes or Miro/Notion boards for remote teams.
- Have each stakeholder fill one version before consolidating.
- Revisit it at the end of the project—it often holds the *original why* when things get messy.

Quick Stakeholder Map

Stage: Strategic Kickstart

What It Is

The Quick Stakeholder Map is a fast, visual tool used to identify all relevant people connected to a project—from decision-makers to end users—and classify their influence, interest, and involvement. It prevents miscommunication, decision bottlenecks, and "invisible resistance" later on.

It helps you define:

- Decision-Makers – People with the final say
- Influencers – Those who shape direction or opinion
- Blockers – People who may delay, resist, or hold power silently
- Executors – The doers responsible for delivery and outcomes

---

Why We Use It

Most project delays or failures stem from people misalignment. When the wrong people are ignored—or the right people are missing—it results in rework, politics, or stalled progress.

This tool ensures:

- You know who's really in charge
- You anticipate roadblocks early
- Everyone knows their role and stake in the project
- Communication is targeted and purposeful

How It's Used

1. During Strategic Kickstart, use this after the Mini Discovery Canvas.
2. Ask the client: *"Who needs to be in the loop? Who can stop this? Who makes the final call?"*
3. Populate the map live during a call or workshop (use post-its, Miro, or printed sheets).
4. Keep it fluid—stakeholders change! Update it weekly or after major decisions.

Sample Use Case

Client: Boutique resort group building a new booking engine

- **Decision-Maker:** Resort Director (budget holder)
- **Influencer:** Marketing Manager (brand tone, copy approval)
- **Blocker:** IT Consultant (concerned about system integrations)
- **Executor:** In-house Developer (building the frontend with Maldicore's guidance)

This clarity allowed Maldicore to manage sign-offs better, adjust project pacing, and avoid surprises.

Template (Matrix View)

ROLE	NAME/TITLE	NOTES
Decision-Maker		Budget, final say
Influencer		Shapes direction
Blocker		Watch for friction
Executor		Day-to-day delivery

Alternate Visual (Interest vs. Power Grid)

This grid helps map influence and involvement:

```
High Power

  ▲
  |
  |  [Keep Satisfied]          [Manage Closely]
  |
  |
  |  [Monitor (Low Effort)]    [Keep Informed]
  └──────────────────────────────────────────► Interest
```

Pro Tips

- Always list actual names, not just roles.
- If someone seems quiet but influential, flag them early—they're often the true blockers.
- Ask: *"If this fails or succeeds, who will care the most?"*
- Use color coding: green (ally), yellow (neutral), red (watch carefully).

Business Snapshot Tool

Stage: Strategic Kickstart

What It Is

The Business Snapshot Tool is a one-slide visual summary that outlines how a business or project works (or will work). It's like a compact X-ray of the operation—showing what's being offered, to whom, how it reaches them, and how value flows in and out.

It's fast to create, easy to understand, and highly reusable across internal teams, external collaborators, investors, or agency partners.

Think of it as your strategic cheat sheet.

Why We Use It

In early-phase projects, people often make assumptions about how a business operates. This tool makes those assumptions visible and aligned—quickly.

It helps:

- Eliminate confusion between vision and reality
- Align team members and stakeholders with a single, unified model
- Speed up onboarding of new collaborators
- Connect business logic to project outcomes

It's also great for teams who say:

- “We know what we're doing, but it's hard to explain.”
- “We're trying to simplify our model.”
- “We need to align marketing and ops with our actual workflow.”

How It's Used

1. Use it as a co-creation tool during the Kickstart session or just after the Discovery Canvas.
2. Start by filling in Offer + Audience, then Revenue + Channels, and finish with Key Flows.
3. Encourage *"right now"* answers—not ideal versions. Capture the real model, not the aspirational one (yet).
4. Revisit and revise it during each future MCIF stage if needed.

Sample Use Case

Client: Subscription-based mental wellness platform

- **Offer:** Guided audio meditations + therapy journals
- **Audience:** Young adults aged 18–35 in urban areas
- **Revenue:** Monthly/annual subscription, freemium upsells
- **Channels:** Instagram, podcast ads, affiliate partners
- **Key Flows:** Ad click → Signup → Trial → Subscription → Community

This snapshot was used by design, tech, and content teams across 3 agencies for cohesion.

Template (Slide Layout)

Here's a sample layout structure:

OFFER	**AUDIENCE**
What we sell / deliver Value proposition	Who we serve (segments) Primary user/customer
REVENUE STREAMS	**CHANNELS**
How we make money/fund Pricing models	How we reach the audience Distribution/touchpoints
KEY FLOWS (Optional)	
Core journey: How value moves from us to the client Example: Discover → Book → Pay → Experience → Share	

Pro Tips

- Keep text short—this should fit on one slide
- Use icons or infographics to make it presentation-ready
- Treat it as a living document—revise it after execution loops or feedback
- If the model is new or uncertain, add a "What We're Testing" row

---

Common Add-Ons

- Cost Structure Overview
- Value Chain Sketch
- SWOT (if strategic clarity is needed)
- Competitor Snapshot (next to it)

Clarity Questions Deck

Stage: Strategic Kickstart

What It Is

Clarity Questions Deck is a set of five high-impact, conversation-starting prompts designed to cut through noise and surface the core strategic essence of a project.

They're not long, complicated, or abstract. In fact, their simplicity is their superpower. They can be answered verbally or in writing and are especially useful when projects feel overwhelming, ambiguous, or scattered.

Think of this as a diagnostic flashlight: a fast way to reveal what's clear and not.

Why We Use It

In almost every kickoff, teams are:

- Misaligned on *why* something is being done
- Focused on features instead of value
- Thinking in execution terms before strategic terms
- Using unclear or buzzword-heavy language

The Clarity Questions Deck resets the room by asking:

- What are we really trying to do?
- Who are we really doing it for?
- What does success really look like?

It helps:

- Bring focus to fuzzy ideas
- Surface assumptions before they become issues
- Create immediate alignment between client and team
- Anchor future decisions to real, grounded answers

How It's Used

Format: Verbally in a session, via a worksheet, on a whiteboard, or asynchronously in a shared doc.

Facilitator Tip: Read each question slowly and let silence hang. Often, the *second answer* is more insightful than the first.

Use early in the Strategic Kickstart, right after the Discovery Canvas or as a warm-up before Stakeholder Mapping.

The 5 Clarity Questions

1. What are we trying to achieve—and why now?
   → Surface urgency, timing, triggers, and business context.
2. Who are we doing this for—and what do they need most?
   → Align on the user/audience and their real pain or aspiration.
3. What does success look like in the next 30/60/90 days?
   → Define both tangible outputs and experiential outcomes.
4. What's the biggest risk if we fail—or if we succeed?
   → Frame both threats and scaling implications.
5. If we had to do only ONE thing really well, what would it be?
   → Forces prioritization and prevents scope creep.

Example Responses (SaaS Startup)

1. ***Achieve*:** Launch v1 to validate market fit with existing waitlist
2. ***Audience*:** Non-tech HR teams who need simpler employee feedback tools
3. ***Success*:** 1,000 trial users, 30% onboarding rate, 5 partner testimonials
4. ***Risk*:** Burning trust with early users by overpromising features
5. ***One thing*:** A beautiful, dead-simple feedback submission interface

Optional Template Layout (for print or Notion)

Clarity Question #1:

Your Answer: ____

Clarity Question #2:

Your Answer: ____

Pro Tips

- Use during internal alignment as well—don't wait for the client.
- Revisit these at project mid-point and close: *Did the answers shift?*
- Write them on sticky notes and post them visibly during sprints.
- If a team struggles to answer, don't force it—dig deeper. That's where the clarity lies.

Pre-Discovery Form

Stage: Strategic Kickstart

What It Is

The Pre-Discovery Form is a lightweight intake questionnaire designed to collect essential context from the client before the first kickoff session. It ensures the advisory team is briefed and aligned before any interaction, saving valuable meeting time.

It's typically shared via a Typeform, Google Form, Notion, or fillable DOCX.

Why We Use It

Meetings are expensive—and often wasted on background info. The Pre-Discovery Form helps:

- Speed up the Kickstart by handling info collection in advance
- Ensure advisors walk into the call informed
- Give clients a sense of structure and professionalism
- Reveal red flags early (e.g., unclear goals, unrealistic timelines, too many stakeholders)

It allows the live session to focus on value and clarity, not basics.

How It's Used

1. Sent to the client (or internal lead) 24–48 hours before the Strategic Kickstart session
2. Reviewed by the advisor or project lead
3. Used to pre-fill the Discovery Canvas, Stakeholder Map, or Snapshot Tool
4. Referenced during the live session for confirmation or clarification

---

Form Structure – Core Sections

Here's a clean breakdown of what to include:

1. About Your Business / Project	• What is your business, product, or project about? • What problem does it solve or opportunity does it tap into?
2. Why Now?	• Why is this important at this moment? • What triggered the need for this project?
3. Goals	• What are your top 3 goals for this engagement or project?
4. Audience / Users / Stakeholders	• Who is this for? • Are there specific user segments, industries, or internal teams involved?
5. Success	• What does success look like to you? • Are there specific metrics, milestones, or experiences you're aiming for?
6. Challenges or Concerns	• What's been difficult so far? • Are there risks or limitations we should know about?
7. Decision-Making	• Who signs off on final deliverables? • Who should be involved in conversations?
8. Timelines & Urgency	• Do you have a hard deadline or preferred timeline? • Are there upcoming events, launches, or cycles to consider?
9. Tools or Platforms	• Are you already using tools we should integrate with or know about?
10. Anything Else We Should Know?	• Open space for personal notes, context, or flags.

Sample Form Tools

- **Typeform:** Great for branded, user-friendly forms
- **Notion Form Integration:** Perfect for team collaboration
- **Google Forms:** Fast and flexible for quick capture
- **PDF / DOCX:** For email-based clients or offline use

Pro Tips

- Keep the tone friendly and jargon-free
- Add helpful tooltips or example answers
- Don’t make it too long (10–15 minutes max)
- Use logic jumps to keep it dynamic and personalized
- Offer to assist via call or WhatsApp if they prefer to explain rather than type

KPI Gap Grid

Stage: Understand & Unblock

What It Is

The KPI Gap Grid is a fast, visual assessment tool that compares your current performance metrics against ideal or benchmark metrics—highlighting where you're thriving, where you're lagging, and where immediate action can drive the most impact.

It helps turn data confusion into clear, prioritized insights, even if your analytics are incomplete or your team is still early in its measurement journey.

Why We Use It

A huge percentage of business inefficiencies come from:

- Focusing on the wrong KPIs
- Measuring vanity metrics over meaningful ones
- Not having a shared baseline of "what good looks like"

The KPI Gap Grid helps:

- Establish a clear and realistic performance baseline
- Identify strategic blind spots or underperforming areas
- Direct attention toward measurable, high-impact improvements
- Give stakeholders confidence in the path forward

Even a partial grid gives you visibility, direction, and decision leverage.

How It's Used

1. During the Understand & Unblock session, list the 5–10 most relevant KPIs for the project.
2. Compare current performance with ideal targets, competitor benchmarks, or client expectations.
3. Score each KPI with simple color coding (Green = Strong, Yellow = Caution, Red = Gap).
4. Focus conversation on red/yellow zones only—ignore green zones unless they reveal leverage opportunities.

Sample Use Case

Client: Mid-size travel agency launching a new online portal

- **Red Gap:** Time-to-response on inquiries (avg. 48 hrs, target is <6 hrs)
- **Yellow Gap:** Instagram engagement rate slightly below industry average
- **Green Zone:** SEO visibility for long-tail keywords

Result: We prioritized live chat integration and autoresponder flows as first-loop deliverables.

Template Layout

KPI	Current Value	Target /Benchmark	Gap	Priority
Website Conversion Rate	1.8%	3.0%	-1.2% (Red)	High
Average Cart Value	$45	$50	-$5 (Yellow)	Medium
Newsletter Open Rate	38%	35%	+3% (Green)	Low
Client Response Time	36 hrs	<12 hrs	(Red)	High

Scoring Key:

- Green = Performing well
- Yellow = Slight underperformance
- Red = Needs urgent attention

You can use this as a spreadsheet, Miro board, or printable worksheet.

Pro Tips

- Start with what's measurable now, not what's ideal.
- Use "direction of change" if exact targets are unknown (e.g., "We want to increase X by 20%").
- Don't overload with metrics—5–7 well-chosen KPIs is usually enough.
- Revisit the same grid later to demonstrate progress—turn gaps into wins.

Common KPI Categories (Pick Based on Project)

Marketing Projects	Click-through rate (CTR) Lead-to-close ratio Cost per lead/customer Bounce rate
Digital Product / SaaS	Active users (DAU/MAU) Churn rate Feature adoption Support ticket volume
E-commerce	Conversion rate Average order value Repeat purchase rate Abandonment rate
Service-Based Projects	Time-to-response Client satisfaction Utilization rate NPS (Net Promoter Score)

Blocker Radar

Stage: Understand & Unblock

What It Is

The Blocker Radar is a simple yet powerful quadrant matrix used to visually map the sources of friction that are slowing down your project or team. It helps surface blockers across four major areas:

1. **Tech** – Systems, integrations, code, infrastructure
2. **Team** – Roles, communication, buy-in, skill gaps
3. **Timing** – Deadlines, dependencies, availability
4. **Tools** – Missing platforms, inefficient workflows, lack of clarity

This tool turns vague frustration into clear, actionable insight—fast.

Why We Use It

Project delays and poor delivery outcomes almost always stem from unseen or unspoken friction. Often, the loudest blocker isn't the real blocker.

The Blocker Radar:

- Makes blockers visible and specific
- Distinguishes between annoyances and true roadblocks
- Creates a safe space to name challenges without blame
- Helps advisors prioritize where to step in or design a workaround
- Aligns the team around what's slowing us down—and what we can fix now

---

How It's Used

Timing: Used during the *Understand & Unblock* session (can also be revisited during Momentum Loops).
Format: On whiteboard, Miro, MURAL, Notion, or printable sheet.

Steps:

1. Draw or open the quadrant layout (see below).
2. As a team, brainstorm friction points.
3. Place each blocker into its relevant category.
4. Score or rank them:
    - Critical (halts work)
    - Moderate (slows work)
    - Low (just annoying)
5. Pick 1–2 high-impact blockers to solve first.

Sample Use Case

Client: Marketing team redesigning a website with an external agency

Tech Blocker: CMS is outdated and hard to customize
Team Blocker: Internal designer not looped into meetings
Timing Blocker: Key approver on leave for 2 weeks
Tool Blocker: No shared brand folder for files

Immediate action: Replace CMS decision deferred—MVP scope adjusted to static pages.

Visual Layout Template

BLOCKER RADAR	
TECH	**TEAM**
- Bugs - Slow stack	- No decision - Role overlap
TOOLS	**TIMING**
- Wrong tool - No templates	- Delays - Unavailable

Pro Tips

- **Keep the tone non-blaming:** focus on friction, not fault
- If team is shy, use sticky notes or anonymous inputs
- Reuse the radar in retros or weekly standups
- Some “low priority” blockers become critical when stacked—watch for patterns

Example Blocker Prompts (by Quadrant)

Tech

- Are our systems talking to each other?
- Is outdated code or stack slowing us down?
- Are we held hostage by legacy tools?

Team

- Are decisions clear?
- Are roles or responsibilities unclear or overlapping?
- Are there tensions that nobody is naming?

Timing

- Are we waiting on anyone?
- Are there launch dates or fixed dependencies?
- Are we misestimating how long things take?

Tools

- Are we using the right tools for this stage?
- Are documents and assets easy to find?
- Is collaboration smooth or fragmented?

Pain vs. Gain Grid

Stage: [Understand & Unblock]

What It Is

The Pain vs. Gain Grid is a simple 2x2 visual matrix used to prioritize issues, ideas, or tasks based on their level of pain they cause versus the value of solving them. It is used to quickly prioritize issues, ideas, or tasks based on two criteria:

- How much **pain** it causes if left unresolved
- How much **gain** it delivers if solved

It helps teams answer:
"What should we fix, and what can wait?"

It's especially useful when you're facing:

- A pile of problems or requests
- Limited time or team capacity
- Stakeholder overload
- Early-stage MVP decisions

Why We Use It

Every project hits a point where there are too many things to fix—bugs, gaps, client requests, confusion, slowdowns.

Without structure, teams either:

- Try to fix everything (and burn out), or
- Fix nothing (and stall out)

The Pain vs. Gain Grid forces you to focus only on the few issues that matter most—high-impact, high-pain items that are worth solving now.

How It's Used

Format: Can be drawn on paper, used in Miro/Notion/Slides, or done as a team.

Steps:

1. List 5–10 tasks, pain points, or improvement ideas
2. Ask:
   - Who is experiencing the pain? (User, Client, Team, Developer?)
   - Who receives the gain? (End User, Stakeholder, Business ROI?)
3. For each idea, rate:
   - Pain = frustration, confusion, manual work, lost time
   - Gain = revenue lift, UX improvement, trust, efficiency
4. Plot each on the matrix:
   - High Pain + High Gain = 🟢 Do Now
   - Low Pain + High Gain = 🟡 Quick Win
   - High Pain + Low Gain = 🟠 Reconsider Later
   - Low Pain + Low Gain = 🔴 Ignore or Delay
   - Focus first on the top-right quadrant (Do Now)

Grid Layout

PAIN (Effort or Friction)

▲

Reconsider Later | **Do Now**

(High Pain & Low Gain) | (High Pain & High Gain)

--------------------+--------------------------▸ **GAIN (Impact)**

Ignore / Delay | **Quick Wins**

(Low Pain & Low Gain) | (Low Pain & High Gain)

|

Sample Use Case

Client: Online course platform launching its beta

Issue	**Pain**	**Gain**	**Quadrant**
Onboarding form too long	High	High	Dow Now
Logo doesn't match landing page	Low	Low	Ignore/Delay
Course preview autoplay annoying	High	Low	Reconsider
Referral system not yet built	Low	High	Quick WIns

Result: Fixed onboarding and autoplay issue first—gained better UX scores and reduced drop-offs.

Clarifying Pain & Gain

Who	**User, Team, Developer, Client**	**Business, User, Stakeholder, Brand**
Pain Means	Friction, burnout, confusion, wasted time	Emotional relief, less effort, clarity
Gain Means	Outcome improvement, revenue, trust boost	Better UX, increased retention, saved costs

---

Pro Tips

- If multiple items land in "Do Now," rank them by effort.
- If no items are High Gain, revisit your strategy—are you solving real problems?
- Include user feedback snippets to validate "pain."
- Revisit this weekly or mid-sprint to reprioritize.

Use It To Prioritize

- Features for MVP
- UX fixes
- Team process changes
- Technical debt
- Content or messaging adjustments

Bonus Variation

Team Pain vs. User Pain" Grid:
Split your post-its or idea cards by color:

- 🟦 = Internal team pain
- 🟩 = External user/client pain

This helps you see who's really struggling—and whether you're building for **comfort or scale**.

Heatmap Canvas

Stage: [Understand & Unblock]

What It Is

The Heatmap Canvas is a prioritization grid that uses color-coded visual zones to quickly evaluate which parts of a project, system, or process need the most attention—based on urgency and importance.

It can be used to assess:

- 🧩 **Features**
- 🔄 **Workflows**
- 🏢 **Business functions**
- 🧑‍💻 **User experiences**
- 👥 **Team operations**

Unlike other prioritization tools, the Heatmap Canvas works best for zooming out and spotting patterns across a system.

Why We Use It

In fast-moving projects, everything can feel important—or equally broken. The Heatmap Canvas gives you a bird's-eye view of:

- 🚨 Where **critical problems** are forming
- ✅ Which areas are **stable or succeeding**
- ⚠️ What's quietly **at risk of being ignored**

It's an excellent decision aid when resources are limited or faced with trade-offs.

How It's Used

Format: Can be used on whiteboards, Miro, Notion tables, or physical printouts.

Steps:

1. Create a table with 5–10 core workflows, functions, or modules (rows).
2. Create 3 columns: Urgency, Importance, and Heat Rating.
3. For each row, rate:
    - Urgency (how time-sensitive it is)
    - Importance (how critical it is to success or strategy)
    - Assign a heat level:
        - 🔴 Red = High heat (action needed now)
        - 🟡 Yellow = Medium (watch and plan)
        - 🟢 Green = Low (stable or deprioritized)
4. Use the heatmap to guide which areas go into your next Momentum Loop.

Template Layout

Area / Function	**Urgency**	**Importance**	🔥 **Heat Level**
Onboarding Flow	High	High	🔴 **Red**
Payment Integration	Medium	High	🟡 **Yellow**
Blog / SEO	Low	Medium	🟢 **Green**
Admin Dashboard	High	Low	🟡 **Yellow**
Email Automation	Medium	Medium	🟡 **Yellow**

Color Key

- 🔴 **Red** = Urgent & critical → **Act now**
- 🟡 **Yellow** = Moderate tension → **Plan & prepare**
- 🟢 **Green** = Stable or low-priority → **Maintain or delay**

Sample Use Case

Client: A startup launching a new travel platform

Heatmap Findings:

- Booking Flow = 🔴 **Red** – frequent drop-offs, must fix immediately
- Admin Panel = 🟡 **Yellow** – internal lag, but not client-facing
- Brand Aesthetic = 🟢 **Green** – not essential at MVP stage

Next Step: Booking flow redesign prioritized for the next loop.

Pro Tips

- Use traffic light color codes for visual clarity in team reviews
- Revisit every 1–2 sprints—heat levels shift with progress
- Let clients vote collaboratively to highlight misalignments
- Add user feedback or metrics next to rows to validate heat ratings

When to Use It

- After initial discovery
- Before planning a roadmap or sprint
- During project retros to guide next-phase decisions

Quick Win Box

Stage: Understand & Unblock

What It Is

The Quick Win Box is a simple 2x2 decision matrix designed to help teams instantly identify high-impact actions that are easy to implement.

It categorizes tasks or ideas based on:

- **Impact** – How much value it adds
- **Effort** – How hard or time-consuming it is to execute

The goal is to find actions in the "low-effort, high-impact" zone—also known as Quick Wins.

Why We Use It

In early sprints or fast-paced projects, trust and momentum are everything. Instead of overplanning, the Quick Win Box helps teams:

- Spot small actions that create fast results
- Build stakeholder confidence quickly
- Generate early data or feedback
- Avoid overcommitting to high-effort ideas before testing basics
- Focus team energy where it matters most right now

> Think of it as a "low-hanging fruit detector" for your entire operation.

How It's Used

Timing: End of the "Understand & Unblock" session or beginning of "Clarity to Concept"
Format: Can be drawn on paper, in Miro, Notion, or as a sticky-note exercise

Steps:

1. Brainstorm ideas, tasks, or fixes (e.g., from the Heatmap, Pain vs. Gain, feedback, or feature wishlist).
2. Plot each one based on effort vs. impact.
3. Focus energy on the top-left quadrant: *Quick Wins*.

Grid Layout

```
                      IMPACT

                         ▲

   Quick Wins            |  High Value, High Effort

   (Do These Now)        |  (Plan Strategically)

                         |

-------------------------+-----------------------► EFFORT

                         |

   Low Value, Low Effort |   Waste of Energy

   (Do only if easy)     |   (Ignore or delay)

                         |
```

Examples of Quick Wins (by Type of Project)

Website Build

- Fix broken link on pricing page
- Create auto-reply for contact form

E-commerce

- Show delivery estimate at checkout
- Highlight bestsellers visually

SaaS MVP

- Add a “What’s Coming” banner
- Replace jargon with plain language

Campaign/Branding

- Update email footer with CTAs
- Add 1-click social share

Pro Tips

- You only need 1–3 quick wins per sprint to create momentum
- Look for things that require no approvals
- If you’re in doubt—test it first, then decide
- Use this tool again at every retro or feedback loop

Bonus Variation: The “No-Brainer Stack”

- Let team members submit “No-Brainer Fixes” anonymously
- Rank them live as a team
- Choose 1–2 per week to implement immediately

Live Wireframe Tools

Stage: Clarity to Concept

What It Is

Live Wireframe Tools refer to collaborative, real-time platforms like Figma, FigJam, Whimsical, and Miro, which allow teams to create visual wireframes, flows, and interface mockups on the fly.

These tools help transform vague requirements and spoken ideas into clickable structures, layouts, and feature maps that can be understood, debated, and improved—without writing a single line of code.

Why We Use It

Words alone aren't enough. People interpret ideas differently. Features get misunderstood. Misalignment creeps in.

Wireframing tools fix that.
They give stakeholders something they can see, react to, and reshape.

The benefits:

- Prevents building the wrong thing
- Aligns design, product, and business early
- Makes feature decisions visual and testable
- Helps users and clients grasp what's coming
- Cuts weeks off the development cycle

How It’s Used

1. During the Clarity to Concept sprint day, the team selects 1–2 key user journeys or product components.
2. Using a tool like Figma, FigJam, Whimsical, or Miro, the facilitator rapidly sketches wireframes.
3. Stakeholders co-create or comment live—everyone sees the idea take shape in real time.
4. The final output is a low-fidelity prototype, page layout, or feature sketch.

Optional: Link wireframes to clickable elements for interactive demos.

Some Recommended Tools

Tool	**Best For**	**Unique Feature**
Figma	Interface mockups, clickable prototypes	Real-time co-design, auto-layouts
FigJam	Idea sketching, flowcharts, sticky mapping	Friendly, fast for non-designers
Whimsical	Flow diagrams, wireframes, mind maps	Clean, structured UI options
Miro	Whiteboarding, collaboration, storyboarding	Infinite canvas with voting features

---

Example Use Case

Client: Boutique hotel chain designing a mobile-first booking funnel

- Used Figma to wireframe the 3-screen booking journey (Search > Select Room > Pay)
- Stakeholders suggested removing a step to reduce drop-offs
- Resulted in a visual build handed directly to developers in 48 hours

---

Pro Tips

- Start with boxes and lines, not visuals—focus on function first
- **Keep sessions short:** 1-hour max per flow or screen set
- Use components and templates for common sections (e.g., header, footer, CTA)
- If needed, have the facilitator "drive" while others give feedback in chat or sticky notes

---

Bonus Use: Sprint Voting

Use Miro or FigJam to post 2–3 wireframe variations and have the team vote for their favorite. It's fast, democratic, and engaging.

MVP Pyramid

Stage: Clarity to Concept

What It Is

The MVP Pyramid is a visual prioritization framework that helps teams categorize features into four clear levels:

1. **Must Have** – Core features required for the MVP to function and deliver its value
2. **Should Have** – Important features that enhance experience or polish
3. **Could Have** – Nice-to-haves that add delight or differentiation
4. **Won't Have (for now)** – Intentionally excluded to save time, cost, or complexity

This framework helps prevent scope creep and ensures MVPs stay lean, focused, and launch-ready.

Why We Use It

Without proper filtering, teams overbuild, overinvest, and overcomplicate. That leads to:

- Late launches
- Feature fatigue
- Technical debt
- Wasted dev time and lost user focus

The MVP Pyramid keeps projects grounded by identifying what delivers the most value with the least effort, based on the core user need.

It also makes priorities visible and shareable—a huge win for stakeholder alignment.

How It's Used

1. After mapping user flows or wireframes, list all potential features or functionality.
2. Review each one with the client or team.
3. Sort them into the pyramid:
    - **Must** = Essential to deliver promised value
    - **Should** = Adds usefulness, but not mission-critical
    - **Could** = Adds value, but non-essential at launch
    - **Won't** = Valuable ideas, but intentionally excluded
4. Use the Musts to shape your first Momentum Loop or MVP build.

Visual Template

MUST HAVE

(Core value / No MVP without these)

SHOULD HAVE

(Important but not deal-breakers)

COULD HAVE

(Nice-to-haves, enhance UX or style)

WON'T HAVE (for now)

(Park for later, not in scope)

Example: MVP Pyramid for a Freelancer Marketplace

Must Have

- Client profile creation
- Job posting
- Freelancer search
- Messaging
- Secure payment

Should Have

- Ratings and reviews
- Job alerts
- Saved jobs/freelancers

Could Have

- Freelancer blog
- Video calls
- Proposal templates

Won't Have

- AI matching engine
- API integration
- Talent badges

Pro Tips

- Don't be afraid to move things down the pyramid. Challenge every "Should" to see if it's really a "Must."
- Use this with developers to clarify what they're building in Loop 1 vs Loop 2.
- Revisit after user feedback to shift or promote features up or down.
- Keep the "Won't Have" section visible—these often return in Phase 2, and keeping them visible helps avoid re-debate.

3 Concept Paths Exercise

Stage: Clarity to Concept

What It Is

The 3 Concept Paths Exercise is a collaborative, low-fidelity creative exploration where the team (with or without the client) develops three distinct ideas or design directions for the same problem or project goal.

Each path can be:

- A narrative (e.g., "This version focuses on empowerment vs. efficiency")
- A visual theme or mood
- A product strategy or feature set
- A workflow or UX structure

Once drafted, the team votes on which path feels the strongest—or combines elements across paths to create a unified direction.

Why We Use It

Clients and teams often get stuck in one solution too early, before exploring alternatives. This tool encourages:

- Divergent thinking (explore options)
- Shared language around abstract ideas
- Rapid testing of different "feels" or flows
- Early buy-in and decision-making confidence

Instead of debating a single vague idea, you compare 3 semi-formed ideas side by side—which makes decisions easier, faster, and more grounded.

How It's Used

1. After initial discovery or MVP mapping, take 20–30 minutes to sketch 3 rough paths.
2. Present all 3 options on one canvas (digital or physical).
3. Facilitate a voting session using emojis, stickers, or color codes.
4. **Discuss results:** *What worked? What surprised us? What can we merge?*
5. Use the winning or blended concept to build your wireframes or MVP blueprint.

Format: Use Miro, FigJam, Notion, or paper + post-its
Voting tools: Dots, stars, Loom comments, Meet reactions, etc.

Template Example (Creative Website Brief)

Path	Narrative Focus	Style/Mood	Feature Angle
A	Empowerment & Minimalism	Clean, editorial	3-click booking, testimonial-led
B	Adventure & Local Flavor	Bold, immersive visuals	Map-first UX, geo-tagged stories
C	Wellness & Calm	Soft tones, slow motion	Scroll narrative, ambient audio

Client Vote: Path B wins visually, Path A wins UX
Result: Combined Path A's simplicity with Path B's visuals

Pro Tips

- These don't need to be perfect—the goal is speed and perspective, not polish.
- Include the client early—they often love being part of the process.
- If your client is indecisive, this method gives them a structured choice.
- You can even do one path that's a *safe bet*, one that's *bold*, and one that's *unconventional*—this drives better conversations.

Bonus Variations

- **Design Trio:** Show 3 homepage layouts side by side
- **Narrative Trio:** Frame the brand in 3 different tone voices
- **Experience Trio:** Map 3 different onboarding journeys

Naming & Narrative Module *(Optional)*

Stage: Clarity to Concept (Used in brand-heavy, launch-focused, or storytelling-driven projects)

What It Is

The Naming & Narrative Module is a guided creative exercise that helps teams and clients align on:

- The name of a product, brand, or feature
- Its core message
- Its tone of voice
- Its narrative identity (what it means to users)

It goes beyond logos or visuals. It's about creating a cohesive story people remember and resonate with—one that fits the mission and market.

It's also highly adaptable:

- Create a full brand theme for new launches
- Reposition existing services with a new tone
- Clarify naming for features, campaigns, or internal tools

Why We Use It

Great brands don’t just look good—they speak clearly and feel intentional. But naming and messaging are often left ambiguous, inconsistent, or last-minute.

This tool ensures:

- Everyone is aligned on the “what we say” and “how we sound”
- Clients or internal teams make naming decisions faster
- Designers, developers, marketers, and sales use the same narrative language

This eliminates:

- Brand identity drift
- Mismatched tone across channels
- Confusion during launch or content creation

How It’s Used

1. After Discovery and initial Concept Paths, trigger this module if:
    - You’re launching a new brand/product
    - The client hasn’t finalized a name or story
    - The team is unsure how to position or write about it
2. Use a template or workshop format to co-create answers across key dimensions.
3. Vote or select the clearest, boldest narrative identity.
4. Finalize a Messaging Snapshot (optional) for use in site copy, ads, decks, etc.

Template Structure

Element	**Example Input**
Name	Lumea, Kindwell, or “Travelwise”
Tagline	“Make Travel Make Sense” / “Less Busy. More Flow.”
Brand Archetype	Explorer, Healer, Rebel, Guide
Tone of Voice	Calm / Authoritative / Playful / Minimal / Earthy
Brand Story (Short)	“We started Lumea to make booking slow, mindful escapes easier”
One-Line Pitch	“A slow-travel app for city-weary minds”
Do Say / Don’t Say	“We use mindful” / Don’t say “We’re the Uber of X”

Sample Use Case

Client: A new wellness brand launching an app

- **Name:** Terraflow
- **Tone:** Grounded, slow, poetic
- **Tagline:** “Wellness without the noise.”
- **Voice Rules:** No exclamation points, never “hustle” or “optimize”

This narrative became the guide for UX copy, ad scripts, and the onboarding sequence.

Pro Tips

- Don’t brainstorm the “perfect name” first—start with themes and tone
- Use AI or name generator tools as backup, but ground it in meaning first
- Avoid names that are too trendy or literal—emotion beats cleverness
- Include “Don’t Say” lists to protect the voice from dilution

---

Optional Add-On Tools

- Name Storming Grid (Functional | Emotional | Invented | Hybrid)
- **Voice Card Sort:** Choose 3–5 adjectives that define your tone
- **Pitch Prompt Generator:** “We help [WHO] do [WHAT] without [PAIN POINT]”

Execution Canvas (Lite)

Stage: Momentum Loops

What It Is

The Execution Canvas (Lite) is a visual sprint planner designed to help teams map out short, high-clarity execution loops—typically 7–10 days. It provides a snapshot of:

- What's being done
- Who owns what
- What dependencies exist
- What's due and when

It's like a simplified project control tower for advisors, clients, and team members—without the overhead of full-scale project management tools.

Why We Use It

In fast-moving projects:

- Things fall through the cracks
- Clients get anxious without visible progress
- Team members feel overloaded or misaligned

The Execution Canvas (Lite) solves this by making execution visible, accountable, and focused.

It helps:

- Prevent miscommunication and missed deadlines
- Create rhythm and predictability
- Celebrate small wins quickly
- Reduce client pressure and build trust

How It’s Used

Setup: At the start of each sprint or weekly loop
Tools: Can be done in Notion, Miro, Google Sheets, Trello, ClickUp, or even a printed table

Steps:

1. List the deliverables or tasks planned for this loop.
2. Assign each task owner (person responsible).
3. Add any dependencies (e.g., “needs approval from client”).
4. Set a checkpoint or deadline (end-of-loop or milestone review).
5. (Optional) Add status color or progress labels.

Template Layout

Task / Deliverable	**Owner**	**Dependency**	**Checkpoint / Date**	**Status**
Wireframe: Homepage	Shiu	Awaiting Discovery notes	Oct 12	In Progress
Setup Email Automation	Rayyan	Client copy + API access	Oct 15	Not Started
Launch Hero Banner	Yaeesh	Approved concept needed	Oct 14	Ready
Blog Page Template	Dev Team	Design approval pending	Oct 13	Blocked

---

Sample Use Case

Client: Launching a promotional microsite

- **Tasks:** Build 3 pages, QA test form, connect to CRM
- **Team:** Designer, Dev, Content Lead, Client Rep
- **Execution Canvas:** Filled in with 7-day sprint—clear ownership, visual status, and one checkpoint meeting

Outcome: Everything delivered on time. The client felt reassured. The dev team had fewer distractions.

Pro Tips

- **Keep it simple**—no need to track every micro-task
- Include client tasks too (e.g., "Send final logo")
- **Use visual symbols:**
  - ✅ = Complete
  - ⚠️ = At Risk
  - ⏳ = Waiting
  - 🚫 = Blocked
- Print it on a wall or embed in Slack/Notion for daily visibility
- Do a 5-minute check-in every 2 days using the Canvas

Bonus: Loop Rhythm Options

- **7-Day Loop:** Great for MVP, websites, quick builds
- **10-Day Loop:** Ideal for feature releases or design sprints
- **Rolling Loop:** Always active with checkpoint on Fridays

Sprint Board (ClickUp / Trello / Notion)

Stage: Momentum Loops

What It Is

A Sprint Board is a lightweight, visual project tracker built using tools like ClickUp, Trello, or Notion, where tasks are organized in columns representing their status (e.g., To Do, In Progress, Done).

The board keeps your execution loops agile, transparent, and focused, ensuring that every team member:

- Knows what they're working on
- Sees progress in real time
- Can collaborate and unblock issues quickly

Why We Use It

In Momentum Loops, speed and visibility are everything. Without a shared board:

- Tasks fall through the cracks
- Work gets duplicated
- Clients ask for constant updates
- The team loses clarity on what matters this week

A Sprint Board gives your team and client a single source of execution truth.

How It’s Used

Format: Digital Kanban board (ideal for 7–10 day sprints)

Common Tools:

- **ClickUp** – Full-featured, great for templates and automations
- **Trello** – Visual and beginner-friendly
- **Notion** – Great for blending tasks, docs, and comments

Steps:

1. Set up 4–5 columns:
    - Backlog
    - To Do
    - In Progress
    - Needs Review (or “Waiting for Client”)
    - Done
2. Add each task with:
    - Owner
    - Due Date
    - Tags (Design, Dev, Content, Client)
    - Priority (High/Medium/Low)
3. Review it daily or every 2–3 days for status updates.

Board Example Layout

Status	**Tasks**
To Do	Create social media banner, Set up email automation
In Progress	Build hero section, QA checkout page
Review	Final review of copy deck, Awaiting logo upload
Done	Landing page wireframe, Client meeting deck

Sample Use Case

Project: Launching a new lead-gen funnel

- Board Set Up in Trello
- 10 tasks entered across content, design, and development
- Daily async check-ins in Slack based on board status
- Client given view-only access to follow progress

Result: 100% of tasks done on time, avoided overlap, and feedback was early.

Pro Tips

- Don’t overcomplicate: Keep each card focused on one clear outcome
- Use color labels or tags to group by type (UX, content, bugs, dev)
- Include a “Waiting for Client” column if they’re part of the flow
- Embed the board in your Notion dashboard or project page
- Use checklists inside each task for subtasks (e.g., Copy / Image / QA)

Bonus Tips by Tool

Tool	**Pro Features**	**When to Use**
ClickUp	Built-in dashboards, recurring tasks	For larger, multi-phase teams
Trello	Super visual, easy drag-drop	Great for agencies or clients
Notion	Blends docs + tasks, custom views	Ideal for blended client/studio

Feature & Design Drop Schedule

Stage: [Momentum Loops]

What It Is

The Feature & Design Drop Schedule is a simple, visual timeline that outlines when specific client-facing deliverables will be shared, previewed, or launched—such as:

- Features (e.g., MVP modules, login flow, booking engine)
- Design Assets (e.g., homepage mockup, email banners, branding kits)
- Content (e.g., copy decks, launch blog posts, ad creatives)

It brings structure and transparency to your delivery cycle, helping teams manage expectations, energy, and approvals.

Why We Use It

Without a drop schedule, clients get anxious, teams fall behind, and deadlines get misunderstood. This tool solves that by:

- Giving clients a calendar of value drops
- Creating positive pressure on the team
- Building momentum through visible progress
- Helping avoid endless back-and-forth or scope drift

It also helps your team answer the magic client question:
"So, what are we getting next—and when?"

How It's Used

Format: Timeline (horizontal), Gantt-style chart, calendar view, or Notion table
Timeframe: 1–3 weeks typically, up to 30 days for bigger projects

Steps:

1. List major deliverables across design, dev, and content.
2. Plot expected drop dates (internal + external preview dates).
3. Tag each drop as:
   - Internal Only (team review)
   - Client Preview (pre-launch)
   - Live Launch (public or handoff)
4. Share the schedule with the client and update as loops evolve.

Example Drop Schedule (7-Day Loop)

Drop Date	Type	Deliverable	Owner	Notes
Oct 10	Design Preview	Homepage hero + CTA mockup	Shiu	Share Figma link for feedback
Oct 11	Content Draft	About page copy deck	Rayyan	Client edits requested
Oct 12	Feature Launch	Booking calendar MVP live	Dev Team	Link sent to staging site
Oct 14	Visual Asset	Social ad kit + branding pack	Yaeesh	Needs approval for launch

Sample Use Case

Client: Launching a mobile fitness app MVP

- **Design Drop:** Dashboard layout (shared via Figma)
- **Content Drop:** Welcome email sequence (shared in Google Docs)
- **Feature Drop:** Workout tracker live on staging

Result: Client reviewed content ahead of launch, design was signed off on time, and testing began with no delays.

Pro Tips

- Include file links or preview links in the schedule for easy access
- Use color codes to show stages: Ready, In Review, Delayed, Live
- Share the schedule in advance, not just reactively
- Celebrate drops! Even small ones build team and client momentum
- Print or embed it inside the Execution Canvas for full visibility

Suggested Formats

- Notion Table or Gallery View
- Trello Timeline Power-Up
- ClickUp Milestone View
- Google Sheet Gantt Template

Loom Updates + Check-Ins

Stage: Momentum Loops

What It Is

Loom Updates + Check-Ins are short (1–5 minute) recorded video updates shared with clients and internal teams to:

- Show work in progress
- Explain key decisions
- Highlight upcoming steps
- Reduce the need for live meetings

They're recorded using tools like Loom, Veed.io, ScreenPal, or even native Zoom screen records. They're meant to feel personal, transparent, and focused.

Why We Use It

Clients crave visibility—but don't always have time for calls or status reports. Instead of chasing updates, they want:

- Confidence things are moving
- Clarity on what's done and what's next
- A voice behind the work

Loom check-ins solve all of this, while saving time.

Bonus: Asynchronous updates let global teams stay aligned across time zones.

How It's Used

1. At key milestones (e.g., end of sprint, feature preview, decision point), a team member records a short Loom.
2. The update shows the work, shares context, and invites feedback.
3. The link is sent via email, Slack, Notion, or embedded in the Execution Canvas.
4. Clients respond when convenient—no scheduling needed.

Structure Template for a 2–3 Minute Update

1. Greeting + Context
"Hey team, quick update from Day 5 of our Momentum Loop…"

2. What We Did
"We finalized the booking calendar UX and wrote a copy for the confirmation email."

3. What You'll See
"Here's a walkthrough of the homepage draft and two ad variations."

4. What's Next
"Next up: we'll integrate the new design with the backend and start QA testing."

5. Your Input Needed
"Please comment on the headline options by Friday!"

Sample Use Case

Client: Scaling e-commerce brand launching a new PDP (Product Detail Page)

- **Loom Update #1:** UX walkthrough with voice-over, shared with marketing and dev
- **Loom Update #2:** 2-minute ad script explanation for stakeholder sign-off
- **Result:** Zero live calls needed that week, feedback returned within 24 hours

---

Pro Tips

- Keep it casual and clear—don't over-edit
- Use your webcam + screen share for extra connection
- Include clickable links in your Loom description (e.g., to Figma, doc, board)
- Reuse the Loom in Slack, Notion, email, or client dashboards
- Always end with a "next step" or request

When to Use Looms

- End-of-sprint recaps
- Feature previews
- Explaining design choices
- Requesting client feedback
- Internal handoffs & bug explanations or walkthroughs

Recommended Tools

Tool	**Best For**	**Notes**
Loom	Screen + cam updates	Easiest for async client check-ins
Veed.io	More polished presentations	Better editing and branding options
Zoom	Longer sessions	For internal share + cloud link
Notion Embed	Central project dashboard	Looms play inside the task itself

Usability Test Tracker *(If Needed)*

Stage: Momentum Loops

What It Is

The Usability Test Tracker is a lightweight template or dashboard that lets you:

- Record feedback from real or test users
- Score performance of features or flows
- Spot friction, confusion, or dropout points
- Track progress across iterations and prototypes

It replaces overcomplicated UX spreadsheets with a fast, structured view of what's working and what needs attention—especially during early MVP builds or UX tests.

Why We Use It

Great design isn't about what looks good—it's about what works well for real users. But many teams skip testing because it feels too slow or technical.

This tool keeps it:

- Simple enough for non-researchers
- Fast enough for weekly loops
- Structured enough for clarity

It helps teams and clients make confident design decisions based on evidence, not opinions.

How It's Used

When: After a prototype, feature release, or wireframe is testable
Who: Internal testers, friendly users, real clients, or beta users
Where: Run sessions via Zoom, Loom, in person, or async walkthroughs

Steps:

1. Identify tasks or flows to test (e.g., "Book a room," "Create an account")
2. Observe testers completing tasks
3. Record key insights per tester
4. Score each task with basic criteria:
    - Clarity (Was the user confused?)
    - Success (Did they complete it?)
    - Speed (Was it fast or frustrating?)
5. Highlight top issues or repeat blockers

Tracker Template (Table View)

Tester	Task	Completed?	Confused?	Time Taken	Notes
User 1	Sign Up Flow	Yes	No	1 min	Smooth, but asked about pricing
User 2	Booking Experience	No	Yes	N/A	Didn't see calendar button
User 3	Add to Wishlist	Yes	Yes	45 sec	Confused about heart icon

---

Scoring Example (Color Tags)

- Green = Completed, no confusion
- Yellow = Completed with friction
- Red = Failed or abandoned

Sample Use Case

Client: Online language-learning app testing its onboarding

- 5 testers, 3 tasks (Sign up, Choose course, Take quiz)
- Tracker showed 4/5 failed to complete the quiz step
- **Result:** Changed CTA language, removed a step, improved onboarding rate by 27%

Pro Tips

- 3–5 testers is often enough for fast insights
- Use screen recordings to double-check flow friction
- Focus on patterns, not one-off opinions
- Run tests weekly or bi-weekly during fast builds
- Highlight wins too—not just issues

Bonus Use

- Share the Tracker in client updates to back decisions with data
- Use it in retros to show UX progress
- Combine with Heatmap Canvas or Pain/Gain Grid

Feedback Radar

Stage: Retro + Boost

What It Is

The Feedback Radar is a simple 5-dimension feedback framework that collects structured input from:

- Clients
- Users
- Internal teams
- Stakeholders

Instead of open-ended feedback chaos, the radar scores responses across 5 targeted performance areas, so you can:

- Spot strengths
- Uncover hidden pain points
- Track team perception
- Improve next-phase planning

It creates a 360° pulse-check of your delivery quality, especially after a sprint, launch, or project milestone.

Why We Use It

Feedback is powerful—but when it's scattered or vague, it's hard to act on. The Feedback Radar solves this by:

- Standardizing responses
- Visualizing sentiment
- Highlighting actionable areas for improvement
- Building transparency and trust with clients and collaborators

It's fast, repeatable, and scalable.

How It's Used

1. At the end of a sprint, MVP launch, or project cycle, share the radar as:
   - A Notion form
   - A Google Form or Typeform
   - A physical worksheet (if in-person)
2. Each person scores from 1 (low) to 5 (high) in five dimensions.
3. Responses are plotted on a radar chart or summarized in a score table.
4. Review patterns and take action in the Retro or next Boost phase.

The 5 Performance Dimensions

Dimension	**What It Means**
Clarity	Was the direction, communication, and purpose clear?
Speed	Did we move fast enough for your needs?
Quality	Was the work polished, thoughtful, and accurate?
Impact	Did the output solve a real problem or move things forward?
Experience	Was it enjoyable and easy to work with the team?

Sample Scoreboard

Respondent	**Clarity**	**Speed**	**Quality**	**Impact**	**Experience**
Client (Shiyara)	5	4	4	5	5
UX Lead (Shiu)	4	3	5	4	4
Developer	3	3	4	4	3

Avg Radar Score: Can be plotted on a 5-point star chart or line radar

---

Visualization Tip

Use a radar/spider chart to quickly show score overlap.
Great for:

- Team retrospectives
- Client transparency reports
- Slide decks or handoff summaries

Pro Tips

- Use anonymous responses to get honesty
- Don’t obsess over one low score—look for trends
- Combine with written comments like:
    - “What was most helpful this sprint?”
    - “What can we improve next time?”
- Repeat it every few loops to track progress over time

Bonus Variants

- **Extended Radar:** Add “Innovation,” “Support,” or “Communication”
- **Mini Radar:** Use only 3 categories for fast feedback: Clarity, Speed, Outcome
- **Team Self-Check:** Let the delivery team rate themselves first

Performance Snapshot Template

Stage: Retro + Boost

What It Is

The Performance Snapshot Template is a quick audit framework that reviews delivery across four core performance areas:

1. **UX** – Is the experience intuitive and user-centered?
2. **Tech** – Is the product stable, fast, and scalable?
3. **Content** – Is the messaging clear, aligned, and engaging?
4. **Analytics** – Is performance measurable, tracked, and improving?

This template helps teams and clients quickly reflect on what was launched, assess readiness for growth, and plan what's needed next.

Why We Use It

After a sprint, MVP release, or campaign, you want a fast but meaningful answer to:
"How did we do—and what should we tune next?"

This tool:

- Surfaces strengths and soft spots
- Prepares for optimization or scale
- Gives your client a tangible summary
- Replaces long audits with a 1-pager of insight

How It's Used

1. At the end of a loop, fill out the template with your team or client
2. Score each category on a 1–5 scale
3. Note highlights and red flags in each
4. Add suggestions for improvement or next steps
5. Use as a final deliverable or prelude to a Phase 2 discussion

---

Template Layout

Category	Score (1–5)	Highlights	Gaps / Flags	Next Moves
UX	4	Clean layout, 3-click checkout	Calendar unclear on mobile	A/B test alternate flow
Tech	3	Fast loading, stable MVP	No error messages for form submission	Add alert states + basic QA
Content	5	Strong tone, consistent CTAs	No FAQs or pricing explanation	Add support pages next loop
Analytics	2	GA4 installed, form conversions tracked	No event tracking or heatmaps	Set up Hotjar + tag funnel drop-offs

---

Scoring Key

- 5 – Excellent, no immediate changes needed
- 4 – Strong, a few tweaks could improve
- 3 – Working, but not optimized
- 2 – Needs attention to unlock full value
- 1 – Missing or broken

Sample Use Case

Client: Launching an early-stage digital product

- **UX:** Great visual polish, but mobile usability gaps
- **Tech:** MVP functions, but no QA testing done
- **Content:** Homepage and email copy nailed it
- **Analytics:** Installed GA4, but no user flow data

Result: Used snapshot to prioritize next sprint: Fix mobile UX + expand tracking

---

Pro Tips

- Fill it out collaboratively with team leads or client
- Use comments from the Feedback Radar to inform scores
- Deliver it as a PDF or Notion page—easy to share or present
- Make it part of the launch handoff kit
- Use it in quarterly reviews or MVP-to-V1 transitions

Bonus Use

- Pair this with a Growth Loop Canvas to set up future actions
- Use it to compare multiple product versions (v1 vs v2)
- Turn it into a recurring checkpoint every 30–60 days

Growth Loop Canvas (Lite)

Stage: Retro + Boost

What It Is

The Growth Loop Canvas (Lite) is a visual planning tool that helps you and your client define a clear next-phase strategy based on four growth pathways:

1. **Scale** – Amplify what's working
2. **Refine** – Improve weak spots and feedback gaps
3. **Automate** – Reduce manual work or complexity
4. **Extend** – Add new offerings, features, or markets

This tool shifts focus from short-term delivery to long-term value building, but in a way that's easy to digest and act on quickly.

Why We Use It

After a launch, clients often ask:

- "What now?", "How do we grow from here?", "What's next phase look like?"

Instead of vague advice, this canvas gives:

- A clear, visual plan of what the next 2–4 weeks/months could focus on
- Structured options to fit different team sizes, budgets, or risk levels
- A pathway from MVP → V1 → Growth Engine

How It's Used

1. After the Performance Snapshot and Feedback Radar, run a Growth Planning session (30–60 mins)
2. Map key areas under the 4 quadrants
3. Use sticky notes, digital cards, or bullets
4. Prioritize 1–2 focus areas per quadrant (if applicable)
5. Turn the canvas into your Phase 2 Plan

Canvas Structure Example

Growth Mode	**Examples**
Scale	• Increase ad spend on top-performing funnel
	• Launch referral program
	• Localize for new market
Refine	• Improve mobile UX
	• Optimize checkout copy
	• Reduce onboarding steps
Automate	• Set up CRM email flows
	• Auto-generate reports
	• Zapier integration for new leads
Extend	• Add wishlist feature
	• Create B2B version
	• Launch new product category

Sample Use Case

Client: Startup launched a successful MVP of a travel app

Growth Area	**Ideas**
Scale	Paid ads in top 3 cities, influencer outreach
Refine	Improve search speed, remove calendar friction
Automate	Connect bookings to email flow + Slack notification
Extend	Add experience booking (not just hotels)

Next Step: A new 30-day roadmap built directly from the canvas

---

Pro Tips

- Don’t try to do all 4—focus on 2 key moves first
- Involve both business and tech voices during planning
- Use Post-its or digital cards to test different strategies visually
- Revisit every 30–60 days as your product evolves
- Capture assumptions that still need validating in each box

Bonus Uses

- Pair with MVP Pyramid for roadmap phasing
- Include in your client handoff decks or wrap reports
- Use this canvas to build pitch decks for funding/growth

Scalability Snapshot Template

Stage: Retro + Boost

What It Is

The Scalability Snapshot Template is a one-page scorecard that evaluates the project's readiness to grow, across five essential scale pillars:

1. **Operations** – Can you deliver at volume without breaking?
2. **Tools** – Are your systems and workflows built to scale?
3. **Content** – Is your messaging and media ready for more eyeballs?
4. **User Base** – Are acquisition and retention systems working?
5. **Revenue Model** – Is monetization clear, tested, and expandable?

This snapshot helps flag what's strong, what's fragile, and what needs fixing before you scale.

Why We Use It

After a launch, it's tempting to scale fast—but scaling a weak system amplifies pain, not success.

This template:

- Creates a shared, objective view of scalability
- Highlights operational and tech debt before it explodes
- Sets a smart foundation for Phase 2 or investment
- Offers clients a confidence signal or caution light

How It's Used

1. Run this as a guided team session or 1:1 with your client
2. Score each pillar on a scale of 1–5
3. Note flags, risks, or open questions
4. Identify "scale blockers" and actions to resolve them
5. Use the output to shape the Growth Loop Canvas and Phase 2 plan

---

Template Layout

Scalability Area	**Score (1–5)**	**Strengths**	**Risks / Flags**	**Next Steps**
Operations	3	Solid handoff flow	Manual fulfillment slows at scale	Automate repeat tasks
Tools	2	CRM + Analytics tools in place	Fragile CMS, no QA system	Upgrade stack, set QA process
Content	4	Brand voice clear, templates ready	No video assets for paid ads	Plan video content batch
User Base	3	500 active users, NPS improving	Retention after 7 days drops sharply	Design re-engagement sequence
Revenue Model	2	Payment gateway live	Pricing not tested, no upsell model	Run pricing experiments + validate LTV

Scoring Key

- 5 = Scalable now
- 4 = Strong foundation, minor gaps
- 3 = Average, needs polish before scaling
- 2 = Risky at scale
- 1 = Missing or broken

Sample Use Case

Client: Mid-sized startup finishing MVP

- **Operations:** Good onboarding process, but support handled via email only
- **Tools:** Site crashes when traffic spikes >50 users
- **Revenue:** Subscription model live, but churn unknown

Result: Before scaling ads, focused next 30 days on backend QA, customer support automation, and churn tracking

---

Pro Tips

- Use this template in boardroom or investor decks
- Make it part of your handoff report or Phase 2 proposal
- Add a final “Readiness Score” or green/yellow/red light to simplify status
- Repeat the Snapshot every 30–90 days to track scalability progress
- Use it to say “not yet” with data—not guesswork

Phase 2 Options Menu

Stage: Retro + Boost

What It Is

The Phase 2 Options Menu is a visual roadmap-style menu that outlines what's possible after launch or MVP delivery. It presents multiple post-launch pathways categorized as:

- **Add-ons** – New features or experience layers
- **Campaigns** – Growth-focused marketing or brand pushes
- **Integrations** – Tech stack upgrades or API connections
- **Deeper Features** – High-value ideas that didn't make MVP

Rather than a rigid "next steps" doc, it gives clients a clear buffet of next-phase options—letting them choose based on strategy, budget, or timing.

Why We Use It

After delivery, clients often say:

- "What else can we do?"
- "How do we make the most of this build?"
- "Is there a roadmap or upgrade path?"

The Options Menu:

- Turns vague ideas into tangible, menu-style choices
- Drives upsell opportunities ethically and clearly
- Helps clients see the future—without getting overwhelmed
- Makes Phase 2 feel like a smart decision, not a hard sell

How It's Used

1. After your final sprint, handoff, or launch, present this menu as a:
    - Slide deck section
    - Notion page
    - One-pager PDF
    - Interactive Trello/Miro/ClickUp board
2. Group options under 3–5 strategic categories
3. Briefly describe each item (1–2 lines) with optional:
    - Estimated time/cost range
    - Expected ROI or impact
    - Readiness prerequisites
4. Invite the client to select 1–3 paths for further exploration or a kickoff call

---

Menu Categories + Example Options

Category	**Examples**
Add-Ons	Add social login, build referral program, launch multi-language version
Campaigns	SEO content sprint, influencer outreach, email onboarding funnel
Integrations	CRM integration (e.g., HubSpot, Salesforce), analytics events, Hotjar setup
Deeper Features	Wishlist and save flow, user dashboard, profile system
Team Ops / Support	Create help center, automate FAQs via chatbot

---

Sample Use Case

Client: Launched MVP e-commerce platform

Phase 2 Options Menu included:

- **Add-on:** One-click checkout
- **Campaign:** Holiday launch email + paid ad set
- **Integration:** Shopify + Klaviyo + Meta Pixel
- **Feature Depth:** Product reviews, bundled discounts

Client chose: Ad campaign + email funnel + reviews for next 3-week sprint.

Pro Tips

- Don't overwhelm—12 or fewer options work best
- Include 1–2 "quick wins" and 1 bold idea
- Use visuals or icons for clarity
- You can tag options by:
  - Revenue impact
  - User growth
  - Retention improvement

Bonus Use

- Use the menu in quarterly reviews or proposal decks
- Let the client vote using a Google Form or Notion gallery
- Turn the menu into a clickable roadmap or launch ladder

Strategy Canvas

Stage: Strategic Kickstart / Clarity to Concept

What It Is

The **Strategy Canvas** is a one-page framework used to **crystallize your core strategy** before jumping into execution. It's designed to align your team around:

- **Why you're doing this**
- **Who it's for**
- **What success looks like**
- **How you'll stand out**

Think of it as the **north star snapshot** for your product, project, or campaign.

Why We Use It

Many teams start building before they're aligned. The Strategy Canvas forces you to step back, **get intentional**, and agree on direction—so that every design, feature, and message connects to purpose.

Use it to:

- Avoid disconnected execution
- Sharpen your **value proposition**
- Create a shared language between stakeholders
- Guide decisions in moments of scope creep or conflict

How It's Used

Can be filled in during a 30–45 min working session. Use a whiteboard, Miro board, Notion template, or printout.

1. Start with your **Vision Statement** – What's the bigger change or outcome you aim to create?
2. Define your **Strategic Objectives** – What does success look like short-term (2–6 months)?
3. Identify your **Target Audience/User** – Who exactly are you helping?
4. Clarify your **Key Problems** – What's broken or missing for that audience?
5. Craft a simple **Value Proposition** – Why would they choose you?
6. List **Success Metrics** – How will you know this worked?

Canvas Template

Block	**Prompt / Example**
Vision	What world are you trying to help shape? E.g., *"Empowering remote teams to thrive."*
Strategic Objectives	What are we trying to achieve in this phase? E.g., *"100 pilot signups in 45 days."*
Target Audience	Who is this for? Be specific. E.g., *"Mid-size HR teams in tech companies."*
Problems to Solve	What pain or friction are they experiencing?
Value Proposition	Why will they choose us over alternatives?
Success Metrics	What are 2–3 indicators of success? E.g., *signups, conversions, referrals*

Example Use Case

Client: A team launching an app for remote wellness classes

Vision	**Promote holistic health for distributed teams**
Objective	Drive 200 free trials and 50 paid upgrades in 30 days
Audience	HR managers in startups with 20–100 remote employees
Problem	Difficult to engage teams in wellness activities remotely
Value Prop	Flexible, expert-led classes tailored to team time zones
Success Metrics	# of free trials, NPS score, % conversion to paid

Pro Tips

- Use real user language, not brand-speak
- Limit each box to 1–2 lines for clarity
- Revisit the canvas before every sprint or pivot
- Use as a **slide** in pitch decks, team updates, or wrap reports

UX Flowboard

Stage: Clarity to Concept / Momentum Loops

What It Is

The **UX Flowboard** is a **visual journey map** that outlines the key actions, touchpoints, and emotional states a user goes through when interacting with your product, service, or campaign.

It's a fast and flexible way to:

- Turn abstract strategy into concrete experience
- Identify **pain points**, **drop-offs**, and **wow moments**
- Align your team on what the user *actually does* from first click to success

Think of it as a **whiteboard wireframe** for the end-to-end experience.

Why We Use It

Strategy is the "why." UX Flowboard is the "how."

It helps ensure:

- Your user journey reflects strategic goals
- Friction points are spotted before development
- You design **flows**, not just screens or features
- Every step leads users closer to desired outcomes

Perfect for MVP planning, feature design, onboarding, or campaign experiences.

How It's Used

1. Start with the **entry point** – How does the user first encounter the product or campaign?
2. Map each major **action step** in sequence – browsing, selecting, engaging, confirming, etc.
3. For each step, define:
    - **User action**
    - **System response / visual cue**
    - **Emotion / goal**
    - Optional: time, device, channel
4. Add **icons or stickies** for:
    - Friction 🚫
    - Delight ✨
    - Opportunities 🔍
5. End with a **conversion moment** – signup, purchase, contact, etc.

Flowboard Template

Step	User Action	System Feedback	Emotion/Goal
Entry Point	Clicks on ad	Sees homepage	Curious, skeptical
Step 1	Clicks “Start Trial”	Loads onboarding modal	Interested, evaluating
Step 2	Fills info, selects plan	Sees confirmation + CTA	Motivated, slightly unsure
Step 3	Uses product for 1st time	Receives welcome notification	Onboarded, open to engage
Outcome	Refers a colleague	Thank-you + referral credit	Delighted, sharing energy

Example Use Case

Client: A team launching a referral-based B2B SaaS tool

Entry Point	**LinkedIn Ad → "Start Free Demo"**
Step 1	Signup form
Step 2	Tool walkthrough / wizard
Step 3	Invite teammates via email
Outcome	Referral system used by day 3

Result: Increased onboarding success by mapping emotional drop-off at "invite teammates" step and simplifying UI.

Pro Tips

- Always **start from the user's perspective**, not internal process
- Add **emotion labels** to anticipate moments of hesitation or delight
- Sketch first, digitize later (FigJam, Miro, Notion)
- Reuse across product, marketing, onboarding, and content strategy
- Keep it **lean and collaborative**—it's a flow, not a flowchart

Kanban or Sprint Boards

Stage: Momentum Loops

What It Is

A **Kanban or Sprint Board** is a visual tool used to **track tasks as they move from idea to done**. It helps teams **stay focused**, **work asynchronously**, and **see progress** clearly—especially during fast-moving phases.

In MCIF Lite, it's used to **turn plans into visible action** across 1–2 week build cycles.

Why We Use It

Even small projects hit blockers without visibility. A simple board:

- Keeps everyone aligned and accountable
- Highlights blockers early
- Allows clients or leads to **see progress live**
- Prevents over-scheduling and scope creep

It's especially useful for **multi-skill teams** working in design, content, dev, or ops.

How It's Used

Tools: Trello, ClickUp, Notion, Jira, Miro, or even sticky notes

Basic Setup:

To Do	In Progress	In Review	Done
Task cards waiting to start	Tasks currently being worked on	Awaiting feedback or approval	Completed and closed

Each **task card** should include:

- Clear title and description
- Owner (who's doing it)
- Due date or priority
- Status tags (optional: 🔥 urgent, 🧪 testing, ✨ visible deliverable)

Sprint Use (Optional)

If you're running 1-week or 2-week sprints:

1. Plan the week using **prioritized tasks**
2. Work in daily or bi-daily review cycles
3. End each sprint with:
    - A quick **retro** (what worked/what didn't)
    - Update board for the next sprint

Example Use Case

Client: Building a landing page + referral system in 7 days

Task	**Column**
Draft page content	To Do
Design hero section	In Progress
Review copy w/client	In Review
Publish landing page	Done
Set up referral Zapier flow	To Do

Clients can check status anytime and comment directly inside the board.

Pro Tips

- Keep columns simple: **Too many = confusion**
- Use emojis or color codes for visual sorting
- Have a "**This Week's Focus**" label or column to reduce noise
- If working with clients, add a "**Client Review**" column
- Archive or move done tasks weekly to keep it clean

ESG/UX Alignment Tracker

Stage: Retro + Boost

What It Is

The **ESG/UX Alignment Tracker** is a lightweight evaluation tool to assess how your **user experience design** supports—or contradicts—your **environmental, social, and governance (ESG)** commitments.

It helps you examine:

- Are we delivering a great experience **responsibly**?
- Are we supporting values like **accessibility**, **data privacy**, **inclusion**, and **transparency**?
- Is the **impact** we promise in our messaging reflected in our interface and decisions?

Why We Use It

Modern users care about **ethics, transparency, and responsibility**. This tool ensures your **brand values aren't undermined by poor UX** or overlooked choices.

Use it to:

- Identify misalignments between **intended impact and actual experience**
- Support **compliance and trust** in fast-moving builds
- Elevate decisions from "does it work?" to "does it matter and feel right?"

How It’s Used

Use in retros, planning sessions, or design reviews.

1. List 5–7 key product flows or user interactions
2. Evaluate each across **ESG dimensions**
3. Score (Low / Medium / High) for both **alignment** and **risk**
4. Flag gaps, opportunities, or mismatches to improve

Template Example

Feature / Flow	**Privacy Aligned?**	**Inclusive Design?**	**Environmental Load?**	**Social Impact?**	**Flagged Actions**
Sign-up Form	High	Medium	Low	Medium	Simplify language, add alt text labels
Content Personalization	Medium	Low	Low	High	Offer opt-out & explain recommendations
File Upload Feature	High	High	Medium	Low	Use compressed uploads by default
Push Notifications	Low	Medium	Low	Medium	Revisit opt-in clarity

---

Example Use Case

Client: A marketplace startup emphasizing sustainability and trust

Findings:

- **Product filters** were overwhelming → excluding lower-literacy users
- **Personalized offers** lacked clarity on data use → lowered trust
- **Image-heavy homepage** had high carbon load → uncompressed assets

Next Action:

- Simplified filters, added "how we use your data" tooltip, optimized image sizes

Pro Tips

- Pair this with **user feedback** or NPS scores for deeper insight
- Use icons: ✅ Good, ⚠ Needs review, ❌ Misaligned
- Revisit quarterly or during growth milestones
- Highlight strong areas in marketing (e.g., "Built with accessibility by design")
- Align flagged actions with your **Growth Loop Canvas** → **Refine quadrant**

Disclaimer & Copyright Notice

The MCIF Lite Framework™, the Maldicore Core Impact Framework™, and all related tools, canvases, and strategy templates referenced in this guide are the intellectual property of Maldicore.

This guide is made available as part of Maldicore's **open knowledge initiative** to empower businesses, creators, and changemakers with practical, field-tested frameworks. You are **free to use, adapt, and apply** the contents of this guide in your own projects, teams, and organizations.

However, redistribution, republishing, or resale of this content in full or in part—**without attribution or misrepresenting ownership**—is strictly prohibited.

Rights Reserved:

-
- Framework names such as **MCIF™, Maldicore Trend Radar™, Digital Maturity Index™, Strategic Readiness Scorecard™**, and others mentioned are protected trademarks or proprietary concepts of Maldicore.

Open Use Guidelines:

- ✅ Use freely within your own teams, businesses, or client work
- ✅ Attribute Maldicore if sharing or referencing in public presentations or documents
- ❌ Do not rebrand, resell, or claim ownership over the frameworks or templates provided

For licensing questions, consulting support, or advanced usage rights, please contact:

📩 **legal@maldicore.com**
🌐 **maldicore.com**

Let's build a smarter, more strategic world—together.