Lean for Startups Worksheets
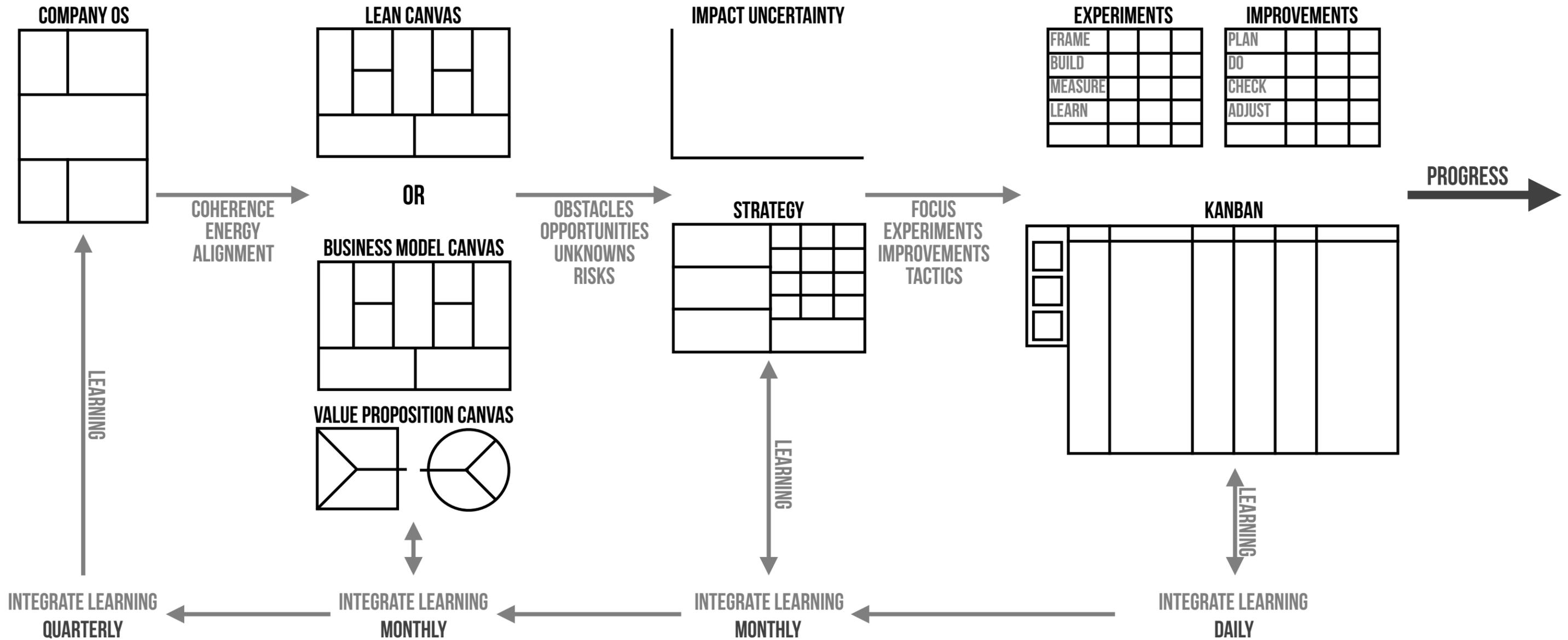
Lean for Startups

CREATE COHERENT BEHAVIORS, DECISIONS AND SENSE OF PURPOSE

MAINTAIN A SHARED UNDERSTANDING OF THE ESSENCE OF YOUR BUSINESS

SURFACE KEY RISKS/ UNKNOWNS AND TAKE FOCUSED ACTION

DO MORE OF THE RIGHT WORK FASTER BY VISUALIZING AND OPTIMIZE THE FLOW OF WORK

COMPANY OS

LEAN CANVAS

IMPACT UNCERTAINTY

EXPERIMENTS

FRAME		
MEASURE		
BUILD		
LEARN		

IMPROVEMENTS

PLAN		
DO		
CHECK		
ADJUST		

COHERENCE ENERGY ALIGNMENT

OR

OBSTACLES OPPORTUNITIES UNKNOWNS RISKS

STRATEGY

FOCUS EXPERIMENTS IMPROVEMENTS TACTICS

KANBAN

PROGRESS

BUSINESS MODEL CANVAS

LEARNING

VALUE PROPOSITION CANVAS

LEARNING

LEARNING

LEARNING

INTEGRATE LEARNING QUARTERLY

INTEGRATE LEARNING MONTHLY

INTEGRATE LEARNING MONTHLY

INTEGRATE LEARNING DAILY

Company Operating System

COMPANY:

DATE:

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WHY: OUR CORE BELIEFS
CREATE COHERENT BEHAVIORS THROUGH SHARED BELIEFS

CORE VALUES

YOUR CORE VALUES ARE THE ESSENTIAL AND ENDURING SHARED BELIEFS. THESE BELIEFS ARE SO FUNDAMENTAL AND STRONGLY HELD THAT THEY WILL OFTEN GO UNCHANGED FOR MANY DECADES.

WOULD THESE VALUES MAKE SENSE OUTSIDE YOUR CURRENT CONTEXT? WOULD YOU WANT FUTURE GENERATIONS TO LIVE BY THESE CORE VALUES? WOULD YOU HONOR THESE VALUES EVEN IF THEY BECAME A COMPETITIVE DISADVANTAGE? WILL YOU HIRE AND FIRE BASED ON THESE VALUES? WOULD YOU QUIT BEFORE COMPROMISING ANY OF THESE VALUES? IF YOU CREATED A NEW CONTEXT, WOULD IT HAVE THESE VALUES?

CORE PURPOSE

YOUR CORE PURPOSE IS THE REASON YOUR COMPANY EXISTS. IT SHOULD CAPTURE THE MOTIVATION BEHIND THE WORK YOU DO. IT SHOULD INSPIRE YOUR WORK WHILE BEING BEYOND ACHIEVEMENT.

DOES THIS PURPOSE INSPIRE YOU? ARE YOU PROUD TO BE PART OF THIS PURPOSE? 100 YEARS FROM NOW, WILL IT STILL INSPIRE? DOES THIS PURPOSE HELP YOU IMAGINE POSSIBLE OPPORTUNITIES OUTSIDE OF YOUR CURRENT SITUATION? DOES THIS PURPOSE HELP YOU UNDERSTAND WHAT OPPORTUNITIES YOU WON'T PURSUE IN THE FUTURE? HOW WILL A CYNIC RESPOND TO THIS PURPOSE?

HOW: OUR GUIDING HEURISTICS
CREATE COHERENT DECISIONS THROUGH SHARED HEURISTICS

GUIDING HEURISTICS

GUIDING HEURISTICS ESTABLISH A COMMON APPROACH TO DECISION MAKING THAT CREATES ALIGNED DECISIONS. THE HEURISTICS SHOULD GIVE CLEAR, CONCISE, HIGH-LEVEL GUIDANCE ABOUT WHAT TO DO AND WHAT NOT TO DO. THINK OF THESE AS LONG STANDING MANTRAS THAT WILL GUIDE THE DECISIONS YOU MAKE. THE HEURISTICS SHOULD BE COHERENT WITH EACH OTHER. THE POWER IS IN THE WHOLE, NOT THE PARTS.

ARE THESE HEURISTICS SPECIFIC ENOUGH TO GUIDE YOUR THINKING AND GENERAL ENOUGH TO STAND THE TEST OF TIME? DO THESE HEURISTICS HELP YOU TURN STRATEGY INTO ACTION? DO THESE HEURISTICS PROVIDE DECISION MAKING CLARITY INDEPENDENT OF THE SITUATION SURROUNDING THE DECISION? DO YOU BELIEVE IN THE HEURISTICS TO THE POINT WHERE YOU WILL LET THEM GUIDE YOU IN GOOD TIMES AND IN BAD TIMES?

WHAT: OUR ASPIRATIONAL DESTINATION
CREATE ENERGY AND ALIGNMENT THROUGH A SHARED GOAL

ASPIRATIONAL DESTINATION

A VISION CLEARLY DESCRIBES WHAT IT WILL BE LIKE TO ACHIEVE YOUR AUDACIOUS GOAL.

IS THE VISION ENGAGING ENOUGH TO CREATE STRONG EMOTIONS FOR THOSE INVOLVED? IS THE VISION ARTICULATED IN A WAY THAT YOU CAN VIVIDLY PICTURE THIS DESTINATION? DOES THE VISION INSPIRE YOU BY PAINTING THE DESTINATION OF A GRAND ADVENTURE?

AUDACIOUS GOAL

AN AUDACIOUS GOAL IS A HUGE AND DAUNTING CHALLENGE EXPRESSED AS A CLEAR AND COMPELLING GOAL.

IS THE GOAL SMART (SPECIFIC, MEASURABLE, ACHIEVABLE, RELEVANT AND TIME-BOUND)? IS THE GOAL EASY TO UNDERSTAND AND REMEMBER? WILL IT BE A STRETCH TO ACHIEVE THIS GOAL? DOES THE GOAL INSPIRE YOU AND OTHERS? WILL ACHIEVING THE GOAL REQUIRE IMPROVEMENT AND GROWTH?

PROBLEM

List your top 1-3 problems.

EXISTING ALTERNATIVES

List how these problems are solved today.

SOLUTION

Outline a possible solution for each problem.

KEY METRICS

List the key numbers that tell you how your business is doing.

UNIQUE VALUE PROPOSITION

Single, clear, compelling message that states why you are different and worth paying attention.

HIGH-LEVEL CONCEPT

List your X for Y analogy e.g. YouTube = Flickr for videos.

UNFAIR ADVANTAGE

Something that cannot easily be bought or copied.

CHANNELS

List your path to customers (inbound or outbound).

CUSTOMER SEGMENTS

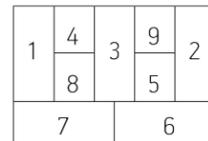List your target customers and users.

EARLY ADOPTERS

List the characteristics of your ideal customers.

COST STRUCTURE

List your fixed and variable costs.

REVENUE STREAMS

List your sources of revenue.

CANVAS FILL ORDER

1	4	3	9	2
8		5		
7			6	
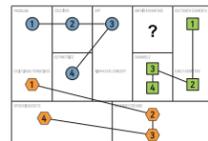
RISK ITERATION PATH

PRODUCT RISK
CUSTOMER RISK
MARKET RISK

Lean Canvas

Impact & Uncertainty

HIGH

LOW

DEGREE OF IMPACT

LEVEL OF UNCERTAINTY

LOW

HIGH

Past example where the solution was obvious to everyone

Past example where an expert, after some analysis, knew how to help you

Past example where the data supported multiple hypotheses and only in hindsight could you understand the correct solution

Past example where you had no time to think, and you knew you had to act immediately

Strategy Worksheet

Company Name: **Date:**
Strategy: **Version:**

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PAST PERFORMANCE (GOALS, ACTUALS, AND GAPS) AND MOMENTS (EVENTS, ACTIONS, ETC)

PREVIOUS PERIOD'S OKRS AND RESULTS

Ojbective	Primary:	Secondary:	Secondary:
Expected Key Result			
Actual Result			
Gap			

What objective data (events, actions, etc.) tells the story of how you got to your current situation?

REACTIONS AND LEARNINGS

Reflect on the above past performance and moments. What did it feel like to go through those moments and achieve those results? What did you learn?

RATIONALE GOING FORWARD

What do these reactions and learnings imply about how to move forward?

PRIMARY OBJECTIVE

What primary objective will help you achieve your strategy?

SECONDARY OBJECTIVE

What objective will help you achieve your strategy?

SECONDARY OBJECTIVE

What objective will help you achieve your strategy?

KEY RESULTS

What specific, measurable, achievable, relevant and time-bound metrics will indicate you have achieved your primary objective?

KEY RESULTS

What specific, measurable, achievable, relevant and time-bound metrics will indicate you have achieved your objective?

KEY RESULTS

What specific, measurable, achievable, relevant and time-bound metrics will indicate you have achieved your objective?

ACTIONS

What sequence of major actions will accomplish your primary objective and key results?

ACTIONS

What sequence of major actions will accomplish your objective and key results?

ACTIONS

What sequence of major actions will accomplish your objective and key results?

UNRESOLVED ISSUES

What further learnings are necessary to gain before you can achieve your primary objective and key results?

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What further learnings are necessary to gain before you can achieve your objective and key results?

RISKS AND DEPENDENCIES

What things may prevent you from achieving your objectives or key results?

Work Management

KEY FOCUS	NEXT WEEK ( )	THIS WEEK ( )	TODAY ( )	DOING ( )	THE PEN ( )	DONE
What key focus areas will drive your work this week?						

Objective

Key Results

Objective

Key Results

Objective

Key Results