

Fluid Innovation Thinking™

The Toolkit

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WHEEL 1 OF 4



Research

Find the right problems before you build.

TOOLS 01–04

01

Research — 01 Trends

The Compass

Find the signal in the noise.

PURPOSE

See which trends are rising or falling in the spaces you care about, who is driving them, and which way to go.

The Compass

01 · RESEARCH · TRENDS

OWNER _____ SPACES _____ UPDATE EVERY day · week · ___ LAST UPDATED _____ SCORE _____ / 50

1 Spaces we watch

What are you looking for, and where?

SCORE 1 2 3 4 5

2 Sources

Where these people talk, what's written about them, and the data.

SCORE 1 2 3 4 5

3 Events

Things that happened: posts, reviews, articles, numbers.

SCORE 1 2 3 4 5

4 Patterns

Events that say the same thing, grouped.

SCORE 1 2 3 4 5

5 Signals

Patterns that keep repeating.

SCORE 1 2 3 4 5

6 Trends

What people want, by vertical, rising or falling.

↑ rising → steady ↓ falling

SCORE 1 2 3 4 5

7 Early adopters

Who is creating the early demand, and what they use.

SCORE 1 2 3 4 5

8 Their words

What they say, in their own language.

SCORE 1 2 3 4 5

9 Direction

Recommend one way to go. The owner decides.

In _____, people want _____.

☐ Follow it ☐ Not yet, because _____

SCORE 1 2 3 4 5

10 What would change our mind

The evidence that would make us drop it. _____

SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **Spaces we watch**	Name the spaces to watch (verticals, kinds of people, kinds of problems) and what you're looking for in each.	One vague space (“AI”).	Two or three named spaces, each with what you're looking for.	Clear spaces, each with what's in and out of scope, reviewed this month.
2 **Sources**	List where these people talk online, and the news and data that cover them.	A couple of websites you already knew.	Places they talk, plus news and data, each with a link.	The full map: communities, newsletters, feeds and data, each rated for usefulness, new ones added this month.
3 **Events**	Capture what happened: a post, a review, an article, a number. Keep the link and the date.	A handful, without links.	Events from several sources, each linked and dated.	A steady flow at your rhythm, from every kind of source, each linked, dated and tagged to a space.
4 **Patterns**	Group events that say the same thing, and name each group.	Events loosely sorted.	Named patterns, each with three or more events.	Every event sits in a pattern or is marked as noise; patterns draw on more than one source.
5 **Signals**	Mark the patterns that keep repeating over time.	A pattern seen once, called a signal.	Signals that repeated across several updates.	Each signal shows how often it repeats and in how many independent sources, and is still repeating.
6 **Trends**	Name each repeating signal as a trend: what people want, in one vertical. Mark excitement and sentiment as rising, steady or falling.	Buzzwords (“AI is big”).	Trends written as what people want, each with a heading.	Each trend in the people's own terms, with its heading over time and the signals behind it.
7 **Early adopters**	Name the people and groups creating the early demand, and the tools they're adopting.	“Early adopters” in general.	Named groups or public voices for each trend.	For each trend: named public voices and communities, what they use and where they talk. Ready for the Storyboard.
8 **Their words**	Save what they say, word for word, with the source.	Paraphrases.	Several quotes per trend, each with its source.	Quotes for every trend, sourced and dated, showing the pain and the want in their own language.
9 **Direction**	Recommend one direction: in this vertical, people want this. The owner says follow it, or not yet.	A vague direction, or everything at once.	One direction, with the trend behind it.	One direction backed by a rising trend, its early adopters and their words, with the owner's decision and the date.
10 **What would change our mind**	For the direction and each top trend, write the evidence that would make you drop it.	A vague worry, nothing you could check.	One line for the direction.	Specific, checkable lines for the direction and every top trend (“if talk falls three months running...”), checked at every update.



Research — 02 Stories

The Storyboard

Find the humans behind the trend.

PURPOSE

Find the real people driving each trend, and understand their world and their pain before anything else.

The Storyboard

02 · RESEARCH · STORIES

OWNER _____ TREND _____ HERO _____ LAST UPDATED _____ SCORE _____ / 50

1 The trend

Which trend on the Compass this hero is driving.

SCORE 1 2 3 4 5

2 The hero

A real person driving the trend.

SCORE 1 2 3 4 5

3 Their world now

Where they work and live; a normal day.

SCORE 1 2 3 4 5

4 What's in the way

The practical problem.

SCORE 1 2 3 4 5

5 How it feels

Frustration, worry, embarrassment...

SCORE 1 2 3 4 5

6 Why it's wrong

Why it shouldn't be this way.

SCORE 1 2 3 4 5

7 What's at stake

What happens if nothing changes.

SCORE 1 2 3 4 5

8 Where they want to go

What success looks like to them.

SCORE 1 2 3 4 5

9 From → to

Who they are now, and who they want to become.

From _____

to _____.

SCORE 1 2 3 4 5

10 Their words

Quotes, each with its source. _____

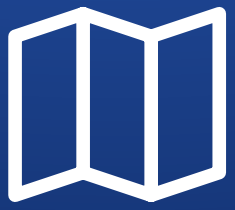
SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **The trend**	Pick the trend from the Compass that this hero is part of.	A topic, not a trend from the Compass.	A named trend from the Compass.	A named, rising trend from the Compass, with the signals that point to this hero.
2 **The hero**	Name a real person in the trend: someone who posts in public, or who agreed to talk to you.	A type of person (“small business owners”).	A real, named person, with where you found them.	A real, named person, with where you found them, what they do and why they belong in this trend.
3 **Their world now**	Describe their world as it is today: their work, their days, the tools and people around them.	A line or two of guesses.	A clear picture of a normal day, partly from what they've said.	A vivid, specific picture of their world, built from what they've said and done, with sources.
4 **What's in the way**	Write the practical problem that stops them, in plain words.	A vague problem (“it's hard”).	One clear, practical problem.	A clear, practical problem, with examples from their own words and how often it happens.
5 **How it feels**	Write how the problem makes them feel, in their language.	A generic feeling (“annoyed”).	A specific feeling, linked to the problem.	Specific feelings in their own words, with the moments that trigger them.
6 **Why it's wrong**	Write why this problem is unfair or shouldn't exist, as they see it.	Left vague.	A clear reason, in plain words.	A clear, felt reason, in their own words, that anyone like them would recognise.
7 **What's at stake**	Write what they lose if nothing changes: time, money, people, pride.	A guess.	One clear loss.	Concrete losses, big and small, in their own terms.
8 **Where they want to go**	Sketch where they want to be, in their words. Nothing about us.	A wish that's really our product.	A clear goal, in their words.	A vivid picture of success as they would describe it, with no product in it.
9 **From → to**	Write who they are today and who they want to become.	Two labels.	A clear before and after.	A before and after they'd recognise, in their own words, showing the change in who they are.
10 **Their words**	Save what they say, word for word, with the source and the date.	Paraphrases.	Several quotes, each with its source.	Quotes for every section of this card, sourced and dated, in their own language.



Research — 03 Journeys

The Map

Invent the journeys they'd love.

PURPOSE

Imagine ideal journeys for each hero, moment by moment, and the value each moment gives them.

The Map

03 · RESEARCH · JOURNEYS

OWNER | HERO | JOURNEY | LAST UPDATED | SCORE / 50

1 The hero

Who this journey is for.

SCORE 1 2 3 4 5

2 From → to

Where they are, and where they want to be.

SCORE 1 2 3 4 5

3 Today, as we understand it

The path they take now, if there is one.

SCORE 1 2 3 4 5

4 The moments

First they go here, then there.

SCORE 1 2 3 4 5

5 What they feel

At each moment.

SCORE 1 2 3 4 5

6 The value they get

What each moment hands them.

SCORE 1 2 3 4 5

7 Where it ends

The moment they arrive.

SCORE 1 2 3 4 5

8 What must be true

The assumptions it rides on.

SCORE 1 2 3 4 5

9 How bold

From safe to bold.

Safe ◯ ◯ ◯ ◯ ◯ Bold

SCORE 1 2 3 4 5

10 Status

Draft, kept, tweaked or removed.

SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

THE MAP · HOW TO USE IT

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **The hero**	Pick a hero from the Storyboard.	A type of person.	A hero from the Storyboard.	A hero from the Storyboard, with their pain and their words open beside you.
2 **From → to**	Copy the hero's from → to from the Storyboard. The journey must get them there.	Left out.	Copied from the Storyboard.	Copied from the Storyboard, and the journey clearly ends at their “to”.
3 **Today, as we understand it**	If they have a path today, sketch its moments and the biggest friction. It may not exist.	Left vague.	Today's main moments and the biggest friction.	Today's path moment by moment, from what they've said, with where it hurts most, or a note that no path exists yet.
4 **The moments**	Invent the journey as a row of moments: where they are, and what happens.	One moment, or a list of features.	Three or more moments in order.	A clear path of moments, each a real situation in their life, from where they start to where they end.
5 **What they feel**	Write what they feel at each moment.	Left out.	A feeling for most moments.	A specific feeling for every moment, rising to the end.
6 **The value they get**	Write what value they get at each moment: something they keep, learn or feel.	None, or vague.	Value named for most moments.	Real value at every moment, specific enough to test.
7 **Where it ends**	Describe the last moment, where they become who they wanted to be.	A vague ending.	A clear final moment.	A vivid final moment that matches their “to”.
8 **What must be true**	List what must be true for this journey to work, each with how confident you are.	One vague hope.	Two or three assumptions, with confidence.	Every key assumption, with a confidence, written so the Simulator can test it.
9 **How bold**	Mark how bold this journey is. Keep plenty of bold ones, as long as they fit the story.	Not marked.	Marked.	Marked, with a line on why it fits the hero's story.
10 **Status**	Keep the journey's status up to date as you weed out and refine.	Not marked.	Marked.	Marked and dated, with why it changed.

04

Research — 04 Pilots

The Simulator

Test the journey before you build it.

PURPOSE

Find out whether a journey would be valuable, first with synthetic personas, then with real people, before anything is built.

The Simulator

04 · RESEARCH · PILOTS

OWNER | JOURNEY | HERO | DATE | SCORE / 50

1 The journey

Which journey from the Map.

SCORE 1 2 3 4 5

2 The hero

Who it's for.

SCORE 1 2 3 4 5

3 The personas

Synthetic people built from the hero.

SCORE 1 2 3 4 5

4 Panel votes

Valuable to me? Up or down.

SCORE 1 2 3 4 5

5 Panel feedback

What the personas said.

SCORE 1 2 3 4 5

6 Real people

Early adopters, shown the journey.

SCORE 1 2 3 4 5

7 Their votes

Valuable to me? Up or down.

SCORE 1 2 3 4 5

8 Their feedback

What real people said.

SCORE 1 2 3 4 5

9 Verdict

Both agree, or back to the Map.

- [ ] Both agree it's valuable: on to Development
- [ ] Not yet: back to the Map

SCORE 1 2 3 4 5

10 What we learned

What goes back to the Map.

SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **The journey**	Pick the journey from the Map you're testing.	A loose idea.	A journey from the Map.	A journey from the Map, with its moments and what must be true.
2 **The hero**	Name the hero from the Storyboard this journey is for.	A type of person.	A hero from the Storyboard.	A hero from the Storyboard, with their words and their pain.
3 **The personas**	Build synthetic personas from the hero's words, the trend's language and the owner's notes.	One generic persona.	A few personas, built from the hero.	A panel of personas with clear behaviour guidelines from real words, so they can't just agree with us.
4 **Panel votes**	Run the journey past each persona, moment by moment, and record their vote.	A single vote.	A vote from every persona.	A vote from every persona, at every moment, with how sure they are.
5 **Panel feedback**	Record what each persona said about the journey.	A summary.	Feedback from every persona.	Specific feedback per moment, in the personas' words, with what they'd change.
6 **Real people**	Show the journey to real early adopters as a simulation: “if you went here, then there…”. Never a product.	Friends or colleagues.	A few real early adopters.	Real early adopters from the Compass, each shown the journey the same way.
7 **Their votes**	Record each real person's vote.	A single yes.	A vote from every person.	A vote from every person, with what they did next.
8 **Their feedback**	Record what each person said, in their words.	A summary.	Quotes from every person.	Quotes from every person, sourced and dated, with what they'd change.
9 **Verdict**	Decide: the panel and real people both find it valuable, or it goes back to the Map.	A guess, without both sets of votes.	A verdict.	A verdict backed by both sets of votes and feedback, with the owner's decision and the date.
10 **What we learned**	Write what this test taught you, so the Map gets better either way.	A vague impression.	One or two lessons.	Clear lessons for the Map and the Storyboard, written as changes to make.

WHEEL 2 OF 4



Development

Build something new that solves real problems.

TOOLS 05–08



Development — 05 Blueprints

The Sketchbook

Draw it before you build it.

PURPOSE

Figure out what you're going to build before you build it: the whole thing, cut into small chunks that can each change on their own.

The Sketchbook

05 · DEVELOPMENT · BLUEPRINTS

OWNER | JOURNEY | WHO DECIDES | REVIEW DATE | SCORE / 50

1 Ready to move

The journey, its early validation, and who said go.

SCORE 1 2 3 4 5

2 What we're building

The whole thing, in a line or two.

SCORE 1 2 3 4 5

3 The shape of it

The floor plan.

SCORE 1 2 3 4 5

4 The chunks

Small parts, each tied to a moment.

SCORE 1 2 3 4 5

5 How they connect

Kept as loose as possible.

SCORE 1 2 3 4 5

6 What each chunk must prove

One question per chunk.

SCORE 1 2 3 4 5

7 What we already have

The foundations.

SCORE 1 2 3 4 5

8 What's new

Only what we truly have to make.

SCORE 1 2 3 4 5

9 Order

Which chunks go first, and why.

1 _____

2 _____

3 _____

4 _____

5 _____

SCORE 1 2 3 4 5

10 What we don't know yet

Open questions, and what would drop a chunk.

SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **Ready to move**	Name the journey that passed the Simulator, what showed it's ready, and who said “go”.	A journey nobody has tested.	A journey with some thumbs up from the Simulator.	A journey with thumbs up from both the panel and real people, and the owner's “go” with the date.
2 **What we're building**	Say what you're building and who it's for, in one or two plain lines.	A feature list.	A clear line on what it is.	One or two lines anyone could repeat: what it is, who it's for, and the moment it serves.
3 **The shape of it**	Sketch the whole thing and its main parts, like a floor plan.	A list, not a shape.	A simple sketch of the main parts.	A clear sketch where every part traces back to a moment in the journey.
4 **The chunks**	Cut it into chunks: each one something a person can touch, small enough to build in days.	Big parts that take months.	Several small chunks, each tied to a moment.	Small chunks that each stand alone, can be built in days and dropped without breaking the rest.
5 **How they connect**	Write what each chunk needs from the others, and keep it as little as possible.	Everything depends on everything.	The main links between chunks written down.	Only the links that must exist, so each chunk can change, ship or be dropped on its own.
6 **What each chunk must prove**	Give every chunk one question it must answer once built.	No questions, just tasks.	A question for most chunks.	A clear, checkable question for every chunk, written before anything is built.
7 **What we already have**	List the people, data, customers and tools you can build on.	Starting from nothing.	The main things you can reuse.	Everything you can rearrange first, matched to the chunks that will use it.
8 **What's new**	List only what you must build new.	Everything is new.	A short list of new things.	A minimal list, each new thing justified by a chunk nothing else can serve.
9 **Order**	Number the chunks in the order you'll build them, starting with what's riskiest or most valuable.	A rough guess at an order.	An order.	An order that builds the riskiest, most valuable chunk first, with a line on why.
10 **What we don't know yet**	List what's still open, and the result that would make you drop each chunk.	A vague worry.	The main open questions.	Every open question, each with the result that would drop the chunk it belongs to.



Development — 06 Designs

The Canvas

Design the moment, not the screen.

PURPOSE

Design what each chunk looks and feels like to the hero, moment by moment, before anyone builds it.

The Canvas

06 · DEVELOPMENT · DESIGNS

OWNER | CHUNK | TESTED WITH | LAST UPDATED | SCORE / 50

1 The chunk

Which chunk, and the moments it covers.

SCORE 1 2 3 4 5

2 Where the hero is

The situation they're in.

SCORE 1 2 3 4 5

3 What they see and do

Step by step, from their side.

SCORE 1 2 3 4 5

4 What they feel

At each moment.

SCORE 1 2 3 4 5

5 The value they get

What they keep, learn or feel.

SCORE 1 2 3 4 5

6 Their words

The language it uses.

SCORE 1 2 3 4 5

7 The carrier

Screen, paper, voice, a person, an object...

SCORE 1 2 3 4 5

8 The look

A sketch or mockup.

SCORE 1 2 3 4 5

9 Tested with

Personas and real people, and what they said.

SCORE 1 2 3 4 5

10 The peak

The detail that must survive.

SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **The chunk**	Pick a chunk from the Sketchbook and list the moments of the journey it covers.	A screen, not a chunk.	A chunk from the Sketchbook.	A chunk from the Sketchbook, with every moment it covers named.
2 **Where the hero is**	Describe where the hero is and what's going on when this happens.	A guess.	A clear situation.	A vivid, specific situation taken from the hero's own words.
3 **What they see and do**	Walk through what they see and do, step by step, from their side.	A feature list.	The main steps, from their side.	Every step from their side, simple enough that nobody needs to be told what to do.
4 **What they feel**	Write what they feel as they go through it.	A generic feeling.	A feeling for each moment.	A specific feeling for each moment, rising to the peak.
5 **The value they get**	Write what they get from it, in their terms.	Value for us, not them.	A clear value for them.	Real value at every moment, in their words, that the Simulator's people confirmed.
6 **Their words**	Write the words it uses, taken from how they talk.	Our jargon.	Mostly their words.	Every word on it in their language, with where it came from.
7 **The carrier**	Choose what carries it, last: a screen, paper, a voice, a person, an object.	Chosen first, out of habit.	A carrier that fits.	The carrier that best fits where the hero is, chosen after the moment was designed.
8 **The look**	Sketch it, or attach a mockup.	Words only.	A rough sketch.	A sketch or mockup clear enough for someone else to build from.
9 **Tested with**	Show it to the Simulator's synthetic personas and to real people, and write what they said.	Only the team.	Personas or real people.	Both personas and real people, with what they said and what you changed.
10 **The peak**	Name the detail that makes it special, and protect it.	Not named.	Named.	Named, explained, and still there after every change.

07



Development — 07 Builds

The Foundry

Build it one chunk at a time.

PURPOSE

Build each chunk for real, put it in front of people as soon as it can be touched, and keep, change or drop it on what happens.

The Foundry

07 · DEVELOPMENT · BUILDS

OWNER | BUILDING | WHO DECIDES | LAST UPDATED | SCORE / 50

1 What we're building

The whole thing, from the Sketchbook.

SCORE 1 2 3 4 5

2 The chunks

Every chunk, with its status.

SCORE 1 2 3 4 5

3 Building now

The chunk being built, at its smallest.

SCORE 1 2 3 4 5

4 Who builds

Who does the work, and who decides.

SCORE 1 2 3 4 5

5 What we're reusing

The existing parts it's built from.

SCORE 1 2 3 4 5

6 Ready to touch

Chunks people can try now.

SCORE 1 2 3 4 5

7 Who touched it

Personas and real people who tried it.

SCORE 1 2 3 4 5

8 What happened

Each result, against its question.

SCORE 1 2 3 4 5

9 Decisions

Keep, change or drop, for each chunk.

_____ ☐ Keep ☐ Change ☐ Drop

_____ ☐ Keep ☐ Change ☐ Drop

_____ ☐ Keep ☐ Change ☐ Drop

SCORE 1 2 3 4 5

10 What we learned

What goes back to the Sketchbook and the Canvas.

SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **What we're building**	Copy what you're building from the Sketchbook, in a line or two.	Unclear.	Copied from the Sketchbook.	Copied from the Sketchbook, and everyone building it can say it in their own words.
2 **The chunks**	List every chunk and mark it: not started, building, or ready to touch.	A to-do list.	Every chunk with a status.	Every chunk with an honest, current status, and its question beside it.
3 **Building now**	Name the chunk being built now, and the smallest version that answers its question.	Several things at once.	One chunk at a time.	One chunk, cut to the smallest version that still answers its question.
4 **Who builds**	Name who is doing the work, the tools they use, and the one person who decides.	Nobody named.	Builders and a decider named.	The builders and their tools named, and one person deciding what's worth making and whether it worked.
5 **What we're reusing**	List what each chunk reuses from what you already have.	Built from scratch.	The main reused parts.	Every chunk built on what exists wherever it can be, with what was saved.
6 **Ready to touch**	List the chunks people can actually try now.	Something half-working, shown to a few.	At least one chunk.	Every finished chunk in people's hands before the next one depends on it.
7 **Who touched it**	Write who tried each chunk: synthetic personas and real people.	Only the team.	Some real people.	Personas and real people from the trend, for every chunk.
8 **What happened**	Write what happened with each chunk, compared with what it had to prove.	Opinions.	A result for each chunk.	A result for each chunk measured against its question, with what people did, not just said.
9 **Decisions**	Decide for each chunk: keep, change or drop. A person decides.	Everything kept.	A decision for each chunk.	A decision for each chunk, made by a person on the evidence, with the date.
10 **What we learned**	Write what the build taught you, as changes to the Sketchbook and the Canvas.	A vague impression.	One or two lessons.	Clear lessons, written as changes to make in the Sketchbook and the Canvas.



Development — 08 Releases

The Launchpad

Get it ready for lift-off.

PURPOSE

Prepare what's built for launch: release versions to small circles of people, compare them, and pick the one that's ready.

The Launchpad

08 · DEVELOPMENT · RELEASES

OWNER _____ VERSION _____ WHO SAID GO _____ DATE _____ SCORE _____ / 50

1 What's ready

The kept chunks, and what they add up to.

SCORE 1 2 3 4 5

2 The version

Its number, what's in it, what changed.

SCORE 1 2 3 4 5

3 Who gets which version

The circles of people.

SCORE 1 2 3 4 5

4 What we're testing

What's different between A and B, and why.

SCORE 1 2 3 4 5

5 Version A

What it is, and who has it.

SCORE 1 2 3 4 5

6 Version B

What it is, and who has it.

SCORE 1 2 3 4 5

7 What people did

Did they use it again and again?

SCORE 1 2 3 4 5

8 The winner

Which version, and why.

SCORE 1 2 3 4 5

9 Ready to launch

Ready or not yet, and who said go.

- [ ] Ready: on to Marketing
- [ ] Not yet, because _____

Who said go _____

SCORE 1 2 3 4 5

10 If it goes wrong

How to roll back.

SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **What's ready**	List the kept chunks from the Foundry and what they add up to.	Unfinished chunks.	The kept chunks.	The kept chunks, adding up to the journey's main moments.
2 **The version**	Give the version a number, list what's in it and what changed since the last one.	Versions you can't tell apart.	A numbered version with its contents.	A numbered version, its contents and every change since the last, so anyone can tell versions apart.
3 **Who gets which version**	Decide which circle gets which version: the team, the Simulator's real people, a small slice of others.	Everyone at once.	Two or more circles.	Small, named circles, each with its version, widening only as each one proves out.
4 **What we're testing**	Write what's different between version A and version B, and what you expect to learn.	Two versions with no clear difference.	A clear difference.	One clear difference, with what you expect and what result would settle it.
5 **Version A**	Describe version A and who has it.	Unclear.	Described, with who has it.	Described, with who has it, since when, and how many.
6 **Version B**	Describe version B and who has it.	Unclear.	Described, with who has it.	Described, with who has it, since when, and how many.
7 **What people did**	Watch what people did with each version: did they come back without being asked?	Compliments.	Usage for each version.	Repeated, unprompted use for each version, measured the same way.
8 **The winner**	Pick the version that worked better, and say why.	A favourite.	A winner.	A winner chosen on what people did, with the numbers behind it.
9 **Ready to launch**	Decide whether it's ready for Marketing: enough real use, not perfection. Someone says go.	Launched without a decision.	A decision.	A decision backed by real, repeated use, with who said go and the date.
10 **If it goes wrong**	Write how you'll go back to the last good version if something breaks.	A hope it won't break.	A way back.	A tested way back to the last good version, and who can trigger it.

WHEEL 3 OF 4



Marketing

Put the right solutions in front of the right people.

TOOLS 09–12



Marketing — 09 Messages

The Newsroom

Say it in their words.

PURPOSE

Find the one line that says what the new thing does for its people, in their own words, and that they repeat back without being asked.

The Newsroom

09 · MARKETING · MESSAGES

OWNER _____ HERO _____ LAUNCHING _____ LAST UPDATED _____ SCORE _____ / 50

1 Ready to launch

What's launching, and who said go.

SCORE 1 2 3 4 5

2 The hero

Who it's for.

SCORE 1 2 3 4 5

3 Their words

What people actually said.

SCORE 1 2 3 4 5

4 What happens to them

The change in their life.

SCORE 1 2 3 4 5

5 How we help

Why they can trust us.

SCORE 1 2 3 4 5

6 The plan

Two or three simple steps.

SCORE 1 2 3 4 5

7 The next step

The one thing we ask.

SCORE 1 2 3 4 5

8 What it doesn't say

Claims we won't make.

SCORE 1 2 3 4 5

9 The message

One line, one breath.

Repeated back by _____ of _____

SCORE 1 2 3 4 5

10 Repeated back

Who said it back unprompted.

SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **Ready to launch**	Name what the Launchpad made ready, and who said go.	Something not yet ready.	A version marked ready.	A version marked ready on real, repeated use, with who said go and the date.
2 **The hero**	Name the hero from the Storyboard this message speaks to.	Everyone.	A hero from the Storyboard.	One hero from the Storyboard, with their world and their pain beside you.
3 **Their words**	Gather what people said in every tool so far, word for word.	Our own words.	A handful of real quotes.	Many real quotes from the Compass, Storyboard, Simulator and Launchpad, each with its source.
4 **What happens to them**	Write what changes for them, and when they notice. Not what the thing is.	A feature list.	A clear change.	A specific change they would notice, in their words.
5 **How we help**	Write why they can trust us to help: what we understand about them, and what we've done.	A boast.	A clear reason to trust us.	A reason to trust us that shows we understand them, backed by what real people did.
6 **The plan**	Write the two or three steps they'd take with us.	Many steps, or none.	Clear steps.	Two or three steps so simple anyone could follow them.
7 **The next step**	Write the one thing we ask them to do next.	Several asks.	One clear ask.	One small, easy ask that follows naturally from the gift.
8 **What it doesn't say**	Write the claims you will not make, so nobody adds them later.	Left open.	A few limits.	Clear limits, so the message never promises more than we'll deliver.
9 **The message**	Write the message in one breath, in their words.	A slogan in our voice.	One clear line.	One line a hero would say to a friend, that people repeat unprompted.
10 **Repeated back**	Read it to the people it's for, and count who says it back without being asked.	Read only to the team.	Read to real people.	Read to many real people, with how many repeated it and what they changed.

10



Marketing — 10 Gifts

The Giftbox

Give before you ask.

PURPOSE

Give the people it's for something of real value first, with nothing asked in return, and watch what they do with it.

The Giftbox

10 · MARKETING · GIFTS

OWNER _____ HERO _____ GIFT _____ DATE GIVEN _____ SCORE _____ / 50

1 The hero

Who it's for.

SCORE 1 2 3 4 5

2 The message

The line that goes with it.

SCORE 1 2 3 4 5

3 The gift

What we give.

SCORE 1 2 3 4 5

4 Why it matters to them

The value, in their terms.

SCORE 1 2 3 4 5

5 Whole on its own

Useful without buying anything.

SCORE 1 2 3 4 5

6 Who receives it

The early adopters, and how many.

SCORE 1 2 3 4 5

7 How it's given

Where and how, with nothing asked.

SCORE 1 2 3 4 5

8 What it must show

Decided in advance.

SCORE 1 2 3 4 5

9 What people did

Kept, used, passed on, came back.

Kept _____ of _____

Used _____ of _____

Passed on _____

Came back _____

SCORE 1 2 3 4 5

10 What it costs, and if it falls short

The cost per gift, and the plan B.

SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **The hero**	Name the hero this gift is for.	Everyone.	A hero from the Storyboard.	One hero, and the early adopters like them on the Compass.
2 **The message**	Copy the message from the Newsroom.	Our slogan.	The Newsroom's message.	The Newsroom's message, repeated back by real people.
3 **The gift**	Pick a real piece of the experience, small enough to give away and good enough to remember.	A discount or a brochure.	A real piece of the experience.	A real moment of the experience people would keep even if they never came back.
4 **Why it matters to them**	Write why it's valuable to them, in their words.	Why it matters to us.	A clear value for them.	A value they'd describe the same way, taken from what they said.
5 **Whole on its own**	Check it works on its own, with nothing to buy and no hook.	A sample with a hook.	Useful on its own.	Complete and useful on its own, with nothing held back to force the next step.
6 **Who receives it**	List who gets it, from the Compass's early adopters, and how many.	A mailing list.	Early adopters from the trend.	Named early adopters and communities from the Compass, with how many in each.
7 **How it's given**	Decide where and how you give it: no form before, no pitch after.	Behind a form.	Given freely.	Given where they already are, with nothing asked before or after.
8 **What it must show**	Write how many must keep, use and pass it on, before you give it.	Decided afterwards.	A number set in advance.	Clear numbers for keeping, using and passing on, set before the first gift.
9 **What people did**	Count who kept it, used it, passed it on and came back.	A feeling.	Counts for each.	Counts for each, compared with what it had to show, with names where people agreed.
10 **What it costs, and if it falls short**	Write what each gift costs, and what you'll do if it falls short.	A hope.	A cost and a plan B.	A cost per gift, and a plan B decided before giving.

11



Marketing — 11 Campaigns

The Lighthouse

Go where they already gather.

PURPOSE

Take the message and the gift to the places the trend's people already gather, told by people like them, and count who takes the gift and answers.

The Lighthouse

11 · MARKETING · CAMPAIGNS

OWNER _____ MESSAGE _____ PLACES _____ DATES _____ SCORE _____ / 50

1 The message

From the Newsroom.

SCORE 1 2 3 4 5

2 The gift

From the Giftbox.

SCORE 1 2 3 4 5

3 The trend it rides

From the Compass.

SCORE 1 2 3 4 5

4 Where they gather

Three places at most to start.

SCORE 1 2 3 4 5

5 The story we tell

The hero, the moment, what changed.

SCORE 1 2 3 4 5

6 Who tells it

People like them, and us.

SCORE 1 2 3 4 5

7 When

The timing in each place.

SCORE 1 2 3 4 5

8 What must happen

Decided in advance.

SCORE 1 2 3 4 5

9 What happened

Took the gift, answered, where.

Place _____ took it _____ answered _____

Place _____ took it _____ answered _____

Place _____ took it _____ answered _____

SCORE 1 2 3 4 5

10 If it falls short

Decided in advance. _____

SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **The message**	Copy the message from the Newsroom.	Our slogan.	The Newsroom's message.	The Newsroom's message, the one people repeated back.
2 **The gift**	Copy the gift from the Giftbox.	A discount.	The Giftbox's gift.	The Giftbox's gift, with what it showed so far.
3 **The trend it rides**	Name the trend this campaign rides.	A buzzword.	A trend from the Compass.	A rising trend from the Compass, with its early adopters.
4 **Where they gather**	Pick up to three places from the Compass's sources where these people already talk.	Where we already advertise.	Places from the Compass.	Up to three places from the Compass, each with who's there and why it fits.
5 **The story we tell**	Tell the story of someone like them: the moment, and what changed for them.	Our story.	A hero's story.	A real hero's story, in their words, that people in each place would recognise.
6 **Who tells it**	Name who tells it: people from the Launchpad's circles, the Simulator's real people, and us.	Only us.	Some real people.	Real people like them, telling it in their own words, with us in support.
7 **When**	Set when it runs in each place.	Whenever.	Dates for each place.	Dates that fit how each place works, spaced so you can learn between them.
8 **What must happen**	Write how many must take the gift, and how many must answer, before it starts.	Reach and likes.	Numbers set in advance.	Numbers for taking the gift and answering, per place, set before it starts.
9 **What happened**	Count who took the gift and who answered, in each place.	Views.	Counts for each place.	Counts for each place, compared with what had to happen.
10 **If it falls short**	Write what you'll do if a place falls short.	A hope.	A plan B.	A plan B for each place, decided before it starts.

12

Marketing — 12 Conversations

The Roundtable

Answer everyone who answers.

PURPOSE

Talk with everyone who answered, one at a time, listen to what happened to them, and learn who is ready for more.

The Roundtable

12 · MARKETING · CONVERSATIONS

OWNER _____ CAMPAIGN _____ WEEK _____ LAST UPDATED _____ SCORE _____ / 50

1 Who answered

Everyone who replied.

SCORE 1 2 3 4 5

2 Every reply answered

By a real person, quickly.

SCORE 1 2 3 4 5

3 What they did with the gift

Kept it, used it, came back.

SCORE 1 2 3 4 5

4 Who they told

Passed it on to whom.

SCORE 1 2 3 4 5

5 What they wish it did

What's missing.

SCORE 1 2 3 4 5

6 What they'd want next

More of what, and how often.

SCORE 1 2 3 4 5

7 Their words

Quotes worth keeping.

SCORE 1 2 3 4 5

8 Not yet, and why

Who was only being kind.

SCORE 1 2 3 4 5

9 Ready for more

Names, and why. Then go.

Name _____ why _____

Name _____ why _____

Name _____ why _____

Who said go _____

SCORE 1 2 3 4 5

10 What we learned

Back to the Newsroom, Giftbox and Compass. _____

SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **Who answered**	List everyone who answered the Lighthouse.	A few names.	Everyone who answered.	Everyone who answered, with where and when.
2 **Every reply answered**	Reply to every person, honestly and by name.	Some left waiting.	Everyone answered.	Everyone answered quickly, honestly, and by name.
3 **What they did with the gift**	Ask what they did with the gift.	Assumed.	Asked of most.	Asked of everyone, with what they actually did.
4 **Who they told**	Ask who they told or passed it on to.	Not asked.	Asked of most.	Asked of everyone, with who those people are.
5 **What they wish it did**	Write what they wish it did, in their words.	Our guesses.	Their wishes.	Their wishes in their own words, grouped by what comes up again and again.
6 **What they'd want next**	Ask what they'd want more of, and how often. Not “would you buy it”.	Asked “would you buy it”.	What they'd want next.	What they'd want next and how often, for everyone who answered.
7 **Their words**	Save the words worth keeping, with who said them and when.	Paraphrases.	Several quotes.	Quotes from many people, sourced and dated.
8 **Not yet, and why**	Mark who isn't ready, and why.	Everyone marked ready.	Some marked not yet.	Everyone marked, with an honest reason for each not yet.
9 **Ready for more**	Mark who is ready for more, and why. When enough are, someone says go to Service.	Everyone who was polite.	Some ready, with reasons.	The clearly ready, each with a reason in their words, and who said go.
10 **What we learned**	Write what the conversations taught you, as changes for the Newsroom, the Giftbox and the Compass.	A vague impression.	One or two lessons.	Clear lessons, written as changes for each tool.

WHEEL 4 OF 4



Service

Deliver real value to the ideal customers.

TOOLS 13–16

13



Service — 13 Explorations

The Workbench

Listen before you offer.

PURPOSE

Work out with each person who's ready what the new thing would change in their week, before any price.

The Workbench

13 · SERVICE · EXPLORATIONS

OWNER _____ PERSON _____ DATE _____ AGREED WITH _____ SCORE _____ / 50

1 Ready for more

Who, from the Roundtable.

SCORE 1 2 3 4 5

2 The person

Their name and situation.

SCORE 1 2 3 4 5

3 Their week today

What they do, what it costs them.

SCORE 1 2 3 4 5

4 What they asked for

In their words.

SCORE 1 2 3 4 5

5 Their moment of value

Where it matters most.

SCORE 1 2 3 4 5

6 Trying it on together

Their real week, with it in.

SCORE 1 2 3 4 5

7 What would change

For them, concretely.

SCORE 1 2 3 4 5

8 What success looks like

In their words, measurable.

SCORE 1 2 3 4 5

9 Ready for an offer?

Yes, or not yet and why.

- [ ] Yes, ready for an offer
- [ ] Not yet, because _____

SCORE 1 2 3 4 5

10 What we learned

Back to the Map and the Storyboard.

SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **Ready for more**	Name the person from the Roundtable, and what they asked for.	Someone who was only kind.	A person marked ready.	A person marked ready, with what they asked for in their words.
2 **The person**	Write who they are and their situation.	A type.	A named person.	A named person, with their work, their days and who's around them.
3 **Their week today**	Describe their week as it is: what they do and what it costs them.	Guessed.	A clear picture.	A clear picture from their own words, with the time, money or worry it costs.
4 **What they asked for**	Write what they asked for, in their own words.	Our words.	Their words.	Their exact words, with when they said them.
5 **Their moment of value**	Find where the new thing would matter most in their life.	Our favourite feature.	A moment in their week.	A specific moment in their week they recognise straight away.
6 **Trying it on together**	Walk through their real week together, with the new thing in it. Use the real thing where you can.	A demo.	A walk-through of their week.	Their real week, with the real thing, done together.
7 **What would change**	Write what would change for them.	Vague benefits.	A clear change.	A concrete change they'd notice, agreed with them.
8 **What success looks like**	Agree what success looks like, in their words and measurable.	Our success.	Their success.	Their success in their words, with a way to check it.
9 **Ready for an offer?**	Decide together whether they're ready for an offer.	Decided without them.	A decision.	A decision made with them, with the reason.
10 **What we learned**	Write what this person taught you, as changes for the Map and the Storyboard.	A vague impression.	One or two lessons.	Clear lessons, written as changes.

14



Service — 14 Offers

The Promise

Promise what you'll do.

PURPOSE

Write down what you'll do for a person, by when and for what price, and what you'll do if you fall short, clearly enough to say yes to in one reading.

The Promise

14 · SERVICE · OFFERS

OWNER _____ FOR _____ PRICE _____ DATE _____ SCORE _____ / 50

1 Ready for an offer

Who, from the Workbench.

SCORE 1 2 3 4 5

2 Who it's for

The hero, in one line.

SCORE 1 2 3 4 5

3 What will happen

To them, in their words.

SCORE 1 2 3 4 5

4 By when

When they'll notice.

SCORE 1 2 3 4 5

5 The price

What it's worth to them.

SCORE 1 2 3 4 5

6 The terms

Simple enough for one reading.

SCORE 1 2 3 4 5

7 If we fall short

What we'll do.

SCORE 1 2 3 4 5

8 The evidence

Why we believe it.

SCORE 1 2 3 4 5

9 Their answer

Yes or not yet, and why.

- [ ] Yes
- [ ] Not yet, because _____
- [ ] Understood in one reading

SCORE 1 2 3 4 5

10 Who keeps the promise

One named person. _____

SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **Ready for an offer**	Name who the Workbench marked ready.	Someone not asked.	A person marked ready.	A person marked ready with them, with what success means to them.
2 **Who it's for**	Write who it's for in one line.	Everyone.	One kind of person.	One line a person would recognise as about them.
3 **What will happen**	Write what will happen to them, in their words.	A feature list.	A clear outcome.	A clear outcome in their words, taken from the Workbench.
4 **By when**	Write when they'll notice the difference.	Someday.	A date or timeframe.	A specific timeframe they agreed is right.
5 **The price**	Set a fair price: what it's worth to them, not what the market will bear.	A guess.	A price.	A price grounded in what it changes for them.
6 **The terms**	Write the terms simply enough to decide in one reading.	Small print.	Clear terms.	Terms so simple nobody needs to ask a question.
7 **If we fall short**	Write what you'll do if you don't deliver.	Nothing promised.	A clear remedy.	A remedy that costs us something real, so the promise means something.
8 **The evidence**	Write why you believe you can deliver it, from the Workbench and the Simulator.	Hope.	Some evidence.	Evidence from real people who tried it, with sources.
9 **Their answer**	Read it to them. If they need a second reading, simplify it. Write their answer.	Not read to anyone.	Read to them, with their answer.	Understood in one reading, with their answer and why.
10 **Who keeps the promise**	Name the one person who keeps this promise.	The company.	A team.	One named person the customer can reach.



Service — 15 Commitments

The Handshake

Both sides keep their word.

PURPOSE

Turn a yes into a commitment both sides keep: what we'll deliver and when, written first, and what they give in return.

The Handshake

15 · SERVICE · COMMITMENTS

OWNER _____ CUSTOMER _____ PROMISE _____ DATE _____ SCORE _____ / 50

1 Their yes

Who said yes, to which Promise.

SCORE 1 2 3 4 5

2 What we'll deliver

Our promise, written first.

SCORE 1 2 3 4 5

3 The first moment of value

Soon after the yes.

SCORE 1 2 3 4 5

4 If we fall short

What we'll do.

SCORE 1 2 3 4 5

5 What they give

What they pay, and for how long.

SCORE 1 2 3 4 5

6 Who keeps the promise

One named person.

SCORE 1 2 3 4 5

7 How they reach us

So the promise can be held to.

SCORE 1 2 3 4 5

8 Making the start easy

Value before paperwork.

SCORE 1 2 3 4 5

9 Agreed by both

Both names, and the date.

Us _____ date _____

Them _____ date _____

SCORE 1 2 3 4 5

10 What happens next

The first moment, in the diary. _____

SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **Their yes**	Name who said yes, and to which Promise.	A maybe.	A clear yes.	A clear yes to a named Promise, with the date.
2 **What we'll deliver**	Write what you'll deliver and when, first, in plain words.	Vague.	Clear deliveries.	Every delivery with a date, in words the customer would use.
3 **The first moment of value**	Set the date of the first moment of value.	After the paperwork.	A date.	A date soon after the yes, already in the diary.
4 **If we fall short**	Copy the remedy from the Promise.	Nothing.	A remedy.	The Promise's remedy, agreed by both.
5 **What they give**	Write what they pay, and for how long.	Unclear.	A price and a period.	A price and a real period, agreed in plain words.
6 **Who keeps the promise**	Name the one person on your side who keeps it.	The company.	A team.	One named person, with their name on this page.
7 **How they reach us**	Write how they reach that person.	A general inbox.	A way to reach the team.	A direct way to reach the named person.
8 **Making the start easy**	Write what you removed so value comes before paperwork.	Forms first.	A simpler start.	A start so easy the first moment of value comes before any admin.
9 **Agreed by both**	Both sides agree, with names and the date.	One side only.	Both agreed.	Both agreed, with names and the date.
10 **What happens next**	Put the first moment of value in the diary, for the Pulse.	Left open.	In the diary.	In the diary, with the Pulse watching for it.



Service — 16 Experiences

The Pulse

Keep the promise, again and again.

PURPOSE

Keep every promise, see who keeps coming back and who leaves, and send what you learn to the Compass to start the next turn.

The Pulse

16 · SERVICE · EXPERIENCES

OWNER _____ EXPERIENCE _____ MONTH _____ LAST UPDATED _____ SCORE _____ / 50

1 What we promised

From the Handshake.

SCORE 1 2 3 4 5

2 Promises kept

Delivered on time, as written.

SCORE 1 2 3 4 5

3 People served

This month, and last month.

SCORE 1 2 3 4 5

4 Came back unprompted

Real adoption.

SCORE 1 2 3 4 5

5 What they do now

That they didn't before.

SCORE 1 2 3 4 5

6 Who left, and why

Ask every leaver.

SCORE 1 2 3 4 5

7 Their words

Quotes worth keeping.

SCORE 1 2 3 4 5

8 What they ask for next

New wants.

SCORE 1 2 3 4 5

9 Signals for the Compass

What goes back to the Compass.

Sent to the Compass on _____

SCORE 1 2 3 4 5

10 What we'll change

In how we serve them.

SCORE 1 2 3 4 5

Score each section from 1 to 5. Add them up for your score out of 50. How to use it: next page.

Ten sections, each scored 1 to 5

Score each section from **1** to **5**. Add the ten scores for your **score out of 50**.

SECTION	WHAT TO DO	1 STARTED	3 GOOD	5 EXCELLENT
1 **What we promised**	List the commitments from the Handshake.	Some of them.	All of them.	All of them, with each first moment of value.
2 **Promises kept**	Count how many promises were kept on time, as written.	A feeling.	A count.	A count for every promise, with each one that slipped and why.
3 **People served**	Count the people served this month and last month.	A guess.	Both months.	Both months, with who joined and who left.
4 **Came back unprompted**	Count who came back without being reminded.	Sign-ups.	A count.	A count of unprompted, repeated use, measured the same way each month.
5 **What they do now**	Write what people do now that they didn't do before.	Assumed.	A few changes.	Real changes in what people do, with examples.
6 **Who left, and why**	Ask everyone who leaves why, and write what they actually did.	Not asked.	Some asked.	Every leaver asked, with what they did, not just what they said.
7 **Their words**	Save what they say, with who and when.	Paraphrases.	Several quotes.	Quotes from stayers and leavers, sourced and dated.
8 **What they ask for next**	Write what they ask for next, in their words.	Our roadmap.	Their requests.	Their requests in their words, grouped by what comes up again and again.
9 **Signals for the Compass**	Write what customers now do and ask for, and send it to the Compass to start the next turn.	Kept to ourselves.	Some signals sent.	Clear signals sent to the Compass, dated, with their sources.
10 **What we'll change**	Write what you'll change in how you serve them.	Discounts to stop leavers.	A few changes.	Changes that answer why people left and what they asked for.



Fluid Innovation Thinking™

The next turn begins.

The Pulse feeds the Compass, and Research starts again.

fluidinnovationthinking.com/toolkit