



The *mini* Strategy Toolbox

Instruction Manual & Guide

www.StrategyToolbox.co.nz

The *mini* Strategy Toolbox

Welcome to the mini Strategy Toolbox, your kick-start resource for making the transformative changes you've always dreamed of. Inside, you'll find 5 powerful tools designed to help you improve, innovate, and grow. With over a decade in Strategy & performance improvement, we've boiled it down to the key tools you'll need and set them in a clear order so you can work through them efficiently.

What's Included in the Toolbox

Instruction Manual: The doc your currently reading offers a guide to the overall process and specific instructions for each tool. It covers how to use the tool as well as how to interpret & apply the outcomes.

Workbook: This is where you can apply everything you learn to your own business. The workbook can be printed out, filled in as PDFs, or uploaded into a creative platform like Miro or Canva to add post-it notes and brainstorm visually.

Best way to use your mini Strategy Toolbox

Follow the order: We've put the tool in an order that flows so recommend you follow this. We do recommend that you circle back to earlier tools.

Read the Instructions First: Prior to tackling each tool, read the instructions and understand the purpose.

Human before AI: We've put some AI prompts throughout, we recommend you use these only *after* you've completed each item. Your knowledge is stronger than AI, and using AI risks narrowing your attention.

Collaborate: Your team, your stakeholders & your advisors can all support you on this journey. Ask for their input and include it in your strategy building



Meet Katy

Hi! I'm Katy, the face behind Strategy Toolbox. I love helping people get their head around complex decisions & situations - and your business strategy is one of them! I've curated this mini Strategy Toolbox with the six tools I'd use if I needed to make a business strategy quick!

Business Strategy & Improvement Expert

I spent four years studying a couple of degrees covering everything from optimising supply chains to human psychology - then I spent a decade in corporates learning how to create strategies & solutions that actually work! I love the moment after a new process or strategy is in place and the team say the classic 'we should've done this years ago!' Strategy Toolbox has been built with bringing that feeling to small businesses, helping them get clarity, momentum and just generally making their lives easier! It's not meant to be so hard!



Book a Free Chat with me!

Whether you're just starting out on your journey or your business is growing faster than you can keep up, I'd love to help! I've got a knack for taking convoluted, confusing and overwhelming topics and turning them into a few clear & actionable steps!



[Booking Calendar](#)



SECTION ONE:

Your Business, Your Offering & Where you are now.

In this section we take a clear eyed look at your business: what you offer customers, how you currently deliver it and how you dream it might look in the future. Before planning What & How you will do it, you need to be clear on your why.

It's normal to feel a little overwhelmed at this stage, suddenly all those ideas & fears that have been swirling around in your brain are there on paper looking you in the face! But don't worry, the next section will guide you through turning all of this into a clear, prioritised & achievable plan.

● **TOOLS USED IN SECTION ONE**

1

OSTERWALDER VALUE PROPOSITION

Clarifies what you offer and why it matters.

2

SWOT ANALYSIS

Provides oversight to guide future focus.

OSTERWALDER VALUE PROPOSITION EXPLAINED

Are you crystal clear on the value you're delivering to your customers? This quick exercise helps you pinpoint exactly what that value is, so you can build a strategy laser-focused on delivering it.

PURPOSE: The purpose of a value map is to visualize how a customer interacts with your business so that we can better refine our offering. We want to know what they actually gain from the interaction and consider what is motivating them to choose our business over others. By clearly understanding how your offerings create value—either by adding something your customers want or removing something they don't—you can ensure your strategy is aligned with their needs.

HOW TO USE OSTERWALDER VALUE PROPOSITION:

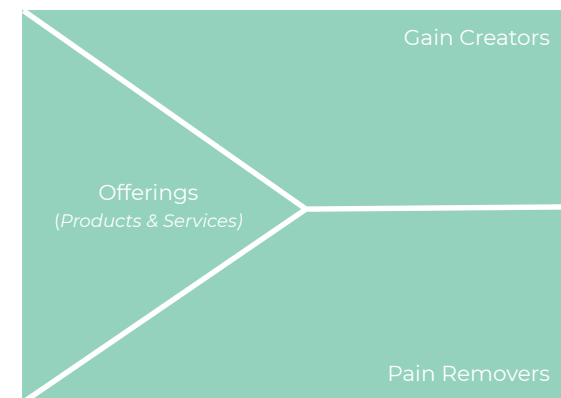
This tool guides you through a simple, three-step process with your customer in mind. A customer is anyone who pays for your services or relies on your activities to meet their goals. You can use this tool for individual customers or groups.

1.List Your Offerings: Identify the specific products or services you're providing to your customer. This should go beyond the basics of physical items or service packages. E.g. do you offer wifi, specialized knowledge, loyalty programmes?

2.Identify Gains: Determine what positive outcomes your offerings create for the customer. How do they benefit, how is their life improved?

3.Identify Pains: Identify what negative issues your offerings help remove or reduce for the customer. What do they get to avoid, what inconvenience is removed?

Bonus: Future Offerings: It can be helpful to also note down in a different colour ideas you have for the future and how these translate into Gain and Pain.



OSTERWALDER VALUE PROPOSITION INTERPRETED

This Value proposition will be at the core of your strategy, from marketing to priorities to pricing strategies. Once you've populated your value proposition, there are three key areas to reflect on.

ALIGNMENT

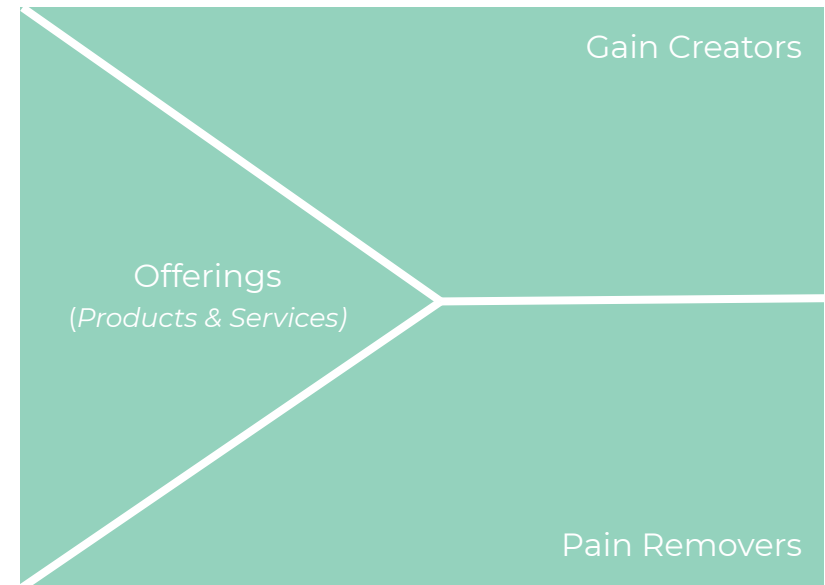
Is your offering what customers truly want? Are you offering them to the standard of quality needed to relieve pain & create gains?

GAPS

Where are your promises not being fully delivered? What gains & pains are you not relieving that you could integrate into your offer.

ARTICULATION

Are you clearly articulating your value proposition to your customers. Do they know your offerings *beyond* the obvious? Are they clear how you are creating value for them?



AI PROMPTS:

- I am doing a Value map on my business which offers 'X.' I have identified my products and services to be "A, B & C." List me 10 suggestions of products and services my business may already be offering that I may have overlooked.
- I am doing a Value map on my business which offers 'X.' I have identified "A, B & C". List me 10 ideas of what I can offer in the future and how that may gain value or relieve pain for my customers.

SWOT ANALYSIS EXPLAINED

SWOT analysis is a classic business framework for doing a bit of a brain-dump and getting really clear on where things stand. It breaks things down into four categories based on whether they are internal (things you control), external (things you respond to), Helpful (can help your business), Harmful (can harm your business).

PURPOSE: A SWOT analysis allows you to create a clear, structured snapshot of your business in a way that allows you to leverage the insights to take powerful action. You'll use this format to summarise what you've done so far & begin to organise your ideas into themes.

HOW TO USE SWOT ANALYSIS:

Brainstorm Inputs: Use insights from your value proposition, Porter's Five Forces, Finance Data, Customer Feedback & your teams knowledge. Put it into the quadrant you think it best matches - sometimes it might go in several.

Strengths: "What do we do better than most?" "What are we proud of?" "Where do we shine?"

Weaknesses: "Where do we fall short?" "What do we neglect?" "Where do our competitors out-perform us?"

Opportunities: "What gaps can we take advantage of?" "What ideas for expansion or pivoting do we have?" "Where is there room to grow?"

Threats: "What are we worried about?" "How could competitors impact us?" "What regulatory changes could hurt us?" "What might disrupt our industry?"



SWOT ANALYSIS INTERPRETED

A fully populated SWOT analysis can be a bit of an overwhelming thing to face. It's important to take a few extra steps to interpret, understand and take insights away from it.

IDENTIFY KEY THEMES: Look within quadrants & across them. Do multiple ideas have the same root cause? Could they be approached together?

LEVERAGE YOUR INSIGHTS: Ask yourself the questions we've outlined for each one to understand what each item means for your business.

HIGHLIGHT THE IMPORTANT ONES: Within each quadrant, highlight one or two that feel like they're the most important.

KEEP CIRCLING BACK: As you work through the remainder of your Strategic Planning, keep circling back to your SWOT Analysis - add more items & adjust what you consider the most important.



AI PROMPTS

- I run a business offering [Service], ask me 5 questions that will help me to populate my SWOT analysis.
- What are the top 10 threats likely to face a business offering [Product] in the next 5 years

SECTION TWO:

YOUR VISION, YOUR MISSION, YOUR VALUES

In the last section you took a good look at where you are: What you're offering, how your competitive landscape looks and what factors are at play that are helpful or harmful to your business. Now we're going to use that information to create your business' Vision, Mission & Values. These will be the north-star for all of your business decisions.

This is the section where your dreams & what you stand for will really start to shine through. Be sure to take your time, zoom out from your day-to-day operations and think really big picture.

- **TOOLS USED IN SECTION TWO**

1

VISION & MISSION STATEMENTS

Articulate what your company dreams of achieving

2

BUSINESS VALUES DEFINITION

Identify the fundamentals that underpin how you operate.

VISION & MISSION STATEMENTS EXPLAINED

Vision & Mission statements are a favourite for standard business strategies, and there's a reason why - they create a solid foundation to translate your dream into actionable direction - as well as helping you to communicate your identity to others.

PURPOSE: These statements provide a number of purposes. They provide clarity & focus to everyone involved in decision making, so that you all move in the same direction. They guide your decisions and priorities to ensure a consistent approach that aligns with your goals. They inspire, motivate & show others what you stand for.

HOW TO WRITE YOUR STATEMENTS

Vision Statement: Your vision is a future focused declaration of what you aspire to become or achieve. It's inspirational & sets a long term direction - painting a picture of future success.

Your vision focuses on why you do it, it should be enduring, even through emerging technology, market shifts and disruptions.

Mission Statement: Your mission is more practical and action-orientated, explaining how you deliver value and to who. If you succeed in your mission it should propel you towards your vision.

Your mission is focused on the short-mid term. It should be actionable & focus on what you do and how you do it.

AI PROMPTS

Note: We recommend asking AI not to rephrase - it's easy to lose your voice when it spits out a shiny phrase.

- Give me feedback, do these statements fit the requirements of a good vision & mission statement?



Our Vision

Our vision is to [Future Impact - Why] by [Guiding Principles]



Our Mission

We serve [Ideal Customer] by providing [offerings] by [Your How] to [key benefit]

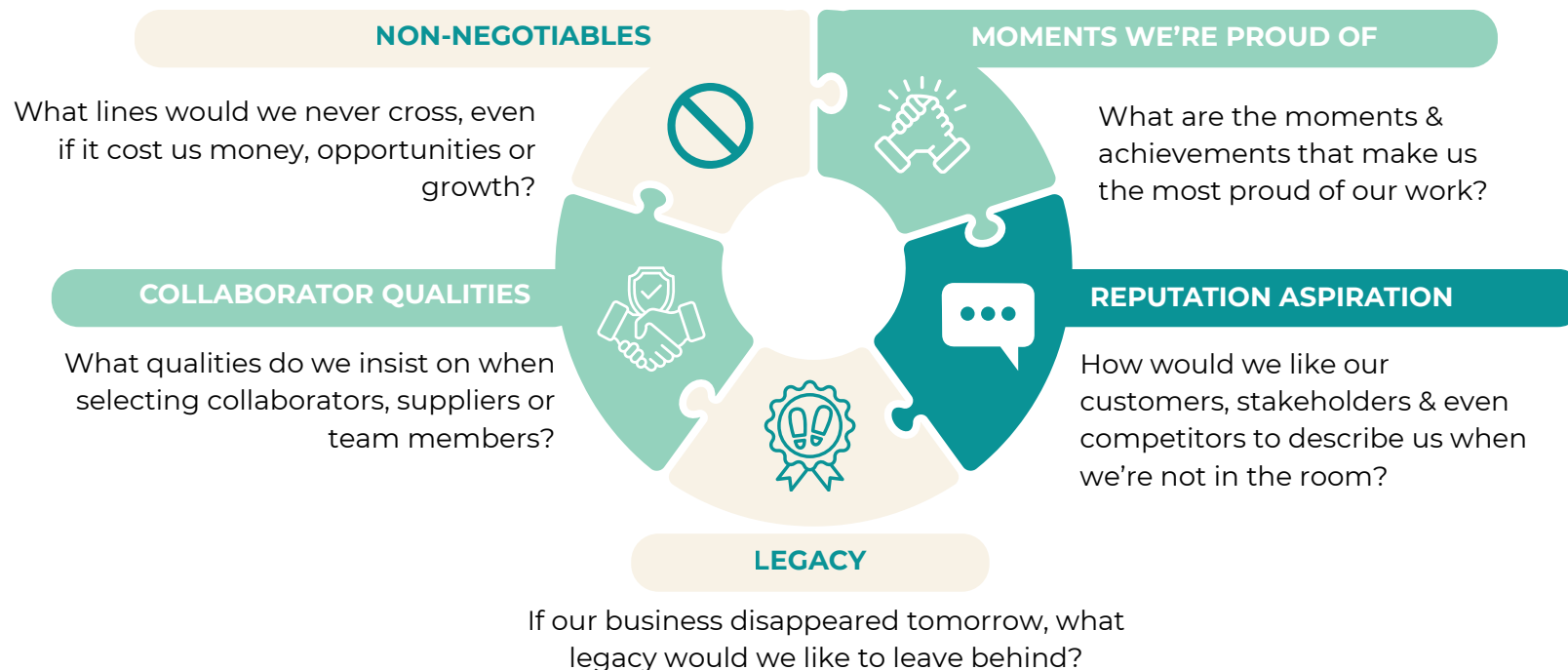
BUSINESS VALUES DEFINITION EXPLAINED

Just like people have different moral compasses, so do businesses. Getting a really clear understanding of the values that underpin your business allows you to not only operate in a way that aligns with what you care about, it also allows you to communicate those values - to customers, team members, stakeholders and investors.

PURPOSE: The purpose of having clear business values is to simplify decision making, create clarity for customers around what you stand for and to give yourself and your team something to guide your behaviours.

HOW TO SELECT YOUR BUSINESS VALUES

Ask yourself these five questions & note down all your thoughts for each one (we suggest at least 3 ideas for each question). You can repeat the same qualities across multiple boxes.



BUSINESS VALUES DEFINITION INTERPRETED

Just like people have different moral compasses, so do businesses. Getting a really clear understanding of the values that underpin your business allows you to not only operate in a way that aligns with what you care about, it also allows you to communicate those values - to customers, team members, stakeholders and investors.

IDENTIFY KEY THEMES: Take a look at what you've written across the board. Cluster similar words together (e.g. Trust, Integrity, Honesty). Then start bundling the larger ideas based on over-arching themes like 'Caring' or 'Sustainability.'

SCORE EACH THEME: Give each cluster a score out of 5, 1-point if it passes each of the following:

1. Is it non-negotiable?
2. Does it differentiate us?
3. Can it guide our daily behaviour?
4. Does the whole team feel pride about this?
5. Is this a realistic aspiration for our team?

SELECT 3-4 THEMES: Based on your scoring, select 3-4 themes that feel the most relevant, inspiring and important to your business

REFINE THE WORDING: Transform the themes into memorable words or short sentences. These should be actionable, written in simple language and able to act as filters for decision making.

MAKE IT VISIBLE: We'll include these Values in your one-page strategy. Showcase them on your website, in store and throughout employee onboarding.

AI PROMPTS

- Give me feedback on these Values? Are they clear enough to help guide decisions ?
- Give me three ideas of how I can showcase these values to potential customers.



SECTION THREE:

PRIORITISING & TAKING ACTION

Section One helped you understand what you're offering your customer and where your business stands now. In Section two you got clear on what matters - your vision, mission and values. Now it's about reflecting on the gaps and opportunities you discovered and deciding which ones to tackle and in what order.

Reflect on all of the activities that you've done so far and what they're suggesting to you - whether it's leveraging strengths you discovered in your SWOT or adjusting a process to better fit the values you outlined. It might be about better communicating the gain-creators from your value proposition or tackling some of the risks you outlined in the threats section of your SWOT. We're going to take all these ideas and pick the best ones.

● TOOLS USED IN SECTION THREE

1

PRIORITISATION MATRIX

Make decisions about what matters most for your business

2

ONE PAGE STRATEGY

Pull together the most important components & keep it visible

PRIORITISATION MATRIX EXPLAINED

So you've probably got a million ideas of all the things you'd like to do! We're going to gather all of them and map them onto a matrix to help you choose where to spend your time.

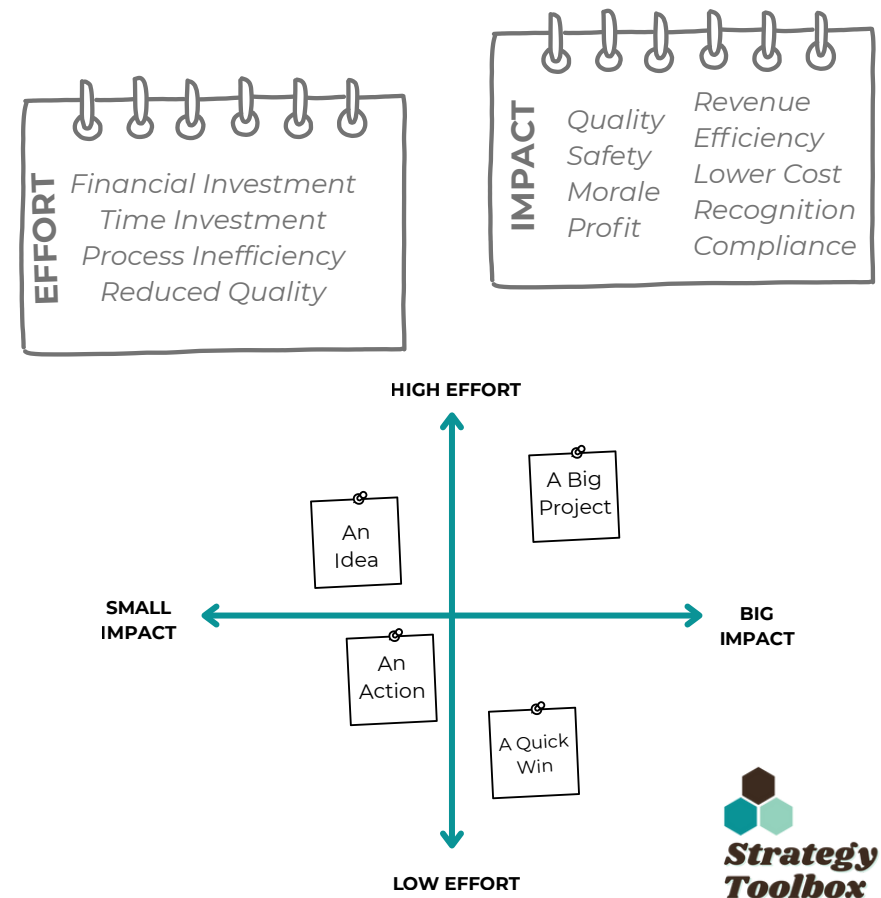
PURPOSE: The purpose of the prioritisation matrix is to visualise the trade-offs of taking on different projects and courses of action. It will allow you to make better decisions about what to prioritise.

HOW TO USE THE PRIORITISATION MATRIX

Gather Inputs: Write down all of the potential actions, projects & focus areas that you want or need to work on.

Consider Effort & Reward: Write a list of the effort & impact factors at play in your business. Then for each of the items you've written down, consider how those effort & impact apply - it can help to define it clearly, especially financials.

Map onto the Matrix: Place the items onto the matrix based on their effort & impact balance. This isn't a perfect science, use a bit of logic & a bit of gut feeling. Depending on your business, different efforts & impacts may matter more, take this into account. As you add more items and get more context, you can shuffle others around.



PRIORITISATION MATRIX INTERPRETED

I know it hurts to hear this, but you can't do everything! Every yes to something is a no to something else.

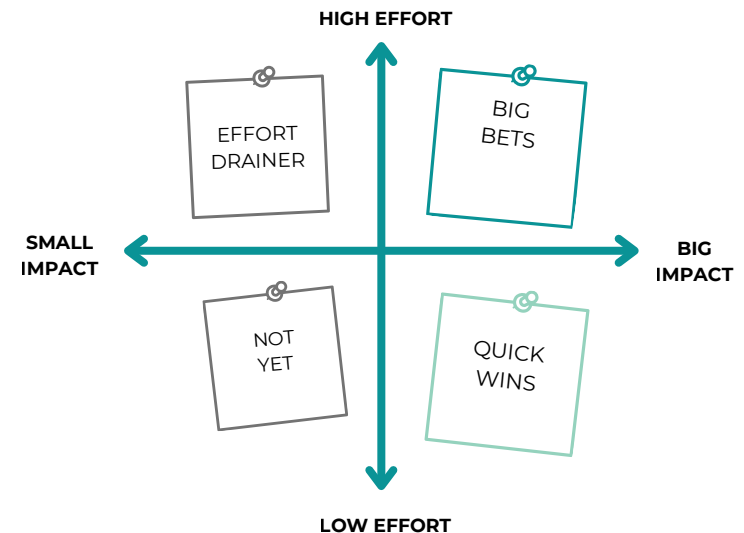
Code Similar Activities: Use a colour, number or icon to identify similar activities based on themes, maybe it's marketing or website changes. This will let you spread your efforts or chunk together multiple activities.

Select Two Big Bets: Your big bets are found in the High Effort, High Impact section, these are the big projects that will draw a lot of resource - whether that's time, money or energy - but they'll bring strong pay-offs. We're not saying no to the rest, but we're saying not now. Selecting just two items gives you the space to actually make them happen.

Select Three Quick Wins: These are found in the Low Effort, High Impact, they'll happen quickly and have a big impact, creating a snowball effect where you'll have more resources to invest in other projects.

Review the Not-Yet and Effort-Drainers: Take a look at what you've got in these two. The Not-Yet's are small impact and low effort, while you've still got Quick Wins you're better off investing your time in those. The Effort-Drainers aren't worthwhile endeavours as they stand, the amount of effort they require doesn't justify the impact that they will have. Feel like they don't fit that label? Reconsider the Effort & Impact, then reflect on your motivators to do them - are you using logic?

Finalise your Selection: Based on what you've selected & what you've left behind, are you happy with your 5 Priorities? The biggest mistake at this point is jumping on shiny objects and trading out 'priorities' when the going gets tough, so choose them wisely.



AI PROMPTS

- Help me choose which of these projects is more important based on *this effort* and *this reward*.
- Help me find some clear themes for these actions and projects

BRING IT ALL TOGETHER

Now it's time to put everything you've done onto one sheet, so that you can keep your strategy visible, useable and ensure it is guiding your decisions.

PURPOSE: To give you a visual, simple reminder of what matters most. A glance at this summary should make your decisions immensely easier, reminding you and your team where your heading and how you're going to get there.

POPULATE YOUR STRATEGY:

Vision & Mission: The Statements you created in Section two.

Our Values: The 3-4 Values you decided on in Section two

Short Term Priorities: The 2 Big Bets & 3 Quick Wins you selected from your Prioritisation Matrix in section three.

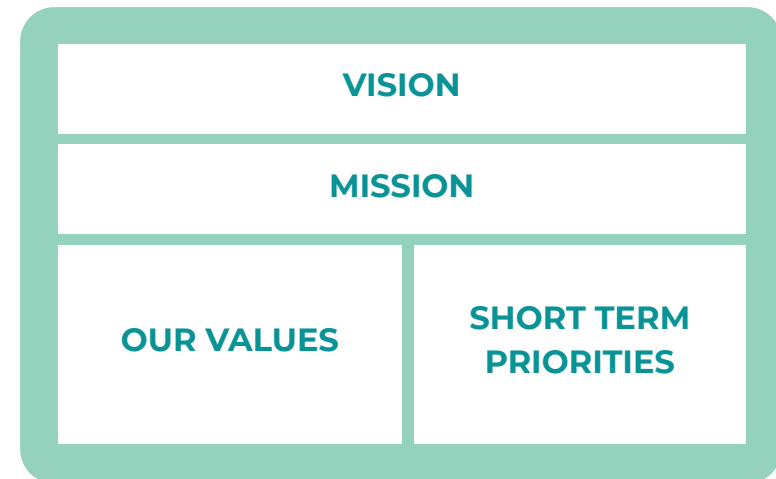
MAKE IT VISIBLE

Print it off, draw it up on paper or set it as your desktop background. You should be looking at this regularly, not tucking it away in a drawer.

UPDATING YOUR ONE PAGE STRATEGY

Your vision, mission & values should be enduring - though you may want to adjust them slightly to begin with. Don't be tempted to make big changes or keep adjusting them often though - these are your roadmap and if you keep changing your map you keep starting over on your path.

Short term priorities will be adjusted as you either complete a priority or make a conscious and deliberate decision to reprioritise. These should be reviewed every 3-6 months depending how quickly your business moves.



NEXT STEPS

Congratulations! You've now got a strategy to guide your business in the direction you truly want! So where to from here? First up, focus on those priorities! When you're ready, here's a few steps to keep that momentum...

Free Discovery Call



Book yourself a FREE 30 minute call with Katy - show us the progress you've made so far and we'll help you plan your next steps.



[Bookings Form](#)

Problem Solving



A free worksheet to help you get to the root cause of issues. Perfect for tackling the priorities you've chosen.



[Download Here](#)

Mindset Workbook



Our mindset workbook is 20 activities to help you run a business you genuinely love. Tackling worries, insecurities, emotions & intentions. Print it out or complete it online.



[Etsy Store](#)

Maturity Assessment



A benchmarking tool to understand how your business is tracking across 1- strategic areas. You'll see where you're gaps are and get clear next steps to progress forward.



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