THE SO WHAT STRATEGY

INTRODUCING CLASSIC STORYLINES THAT ANSWER ONE OF THE MOST UNCOMFORTABLE QUESTIONS IN BUSINESS

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INTRODUCTION

'So what?'

At the end of a presentation, business leaders regularly ask one, single question: 'So what?' It's one of the most uncomfortable questions in business.

They ask because they want to know why the ideas in your presentation should matter to them and to the business, and they want to know in one simple statement. You might have spent countless hours, days and weeks preparing, but they want a succinct answer that summarises everything for them in an instant. And you want the earth to open up and swallow you because you don't know how to answer this question succinctly.

'So what?'

If you don't answer this question well, all of your work can be for nothing. Early in our careers, we were both on the receiving end of this question and not ready to answer it. Those memories are some of our most crushing, yet also our most instructive.

What's the solution? To avoid the embarrassment and frustration of not being able to answer that one simple question, you must state the 'So what' clearly and unambiguously at the *beginning* of your

communication and then make the case to support it, rather than trying to tie everything together at the end when your audience may have lost focus or interest.

That sounds simple, but there is a secret to doing this well – it's what we call 'storylining'. A business storyline* is a simple map of ideas arranged into a logical order and hierarchy. It can be used to make a complex business case or structure a simple email, for a presentation or a speech, for a meeting or a workshop, and there are different storylines to use in different circumstances.

If you have not worked with storylines before, now is a good time to show you what one is. The key to a good storyline is the structure, as outlined in this example.

A storyline example

At first glance, when presented visually, storylines look like a lot of boxes with lines connecting them. When populated with someone's ideas in a way that makes sense, however, they come to life.

Here is a real-life example. It's the storyline a team used to map out their thinking about how to convince a Steering Committee that they should push forward and implement a new system.

We worked with the lead manager to pull together the storyline for the Steering Committee briefing, shown opposite. Take a moment to skim it and we will then explain more about how each of the elements of the storyline works together.

This storyline maps the key ideas the manager wanted to communicate. It works through the **context**, **trigger** and **question**, and states an overall idea – the **'So what'** of the whole communication (that BigCo should implement SuperSys). It then lays out the **hierarchy of ideas** that support the 'So what', breaking each of those five supporting reasons down to provide enough detail on each to satisfy the Steering Committee audience. You can see from the diagram that the top-level ideas in this structure form a strong case to implement the SuperSys solution.

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*   For the sake of simplicity, we'll call all business storylines from now on 'storylines'. We realise this term is used in many different contexts, but it has a specific use here that will be consistent throughout this book.

Example storyline: SuperSys recommendation

Context	SuperSys has been proposed as a replacement for the existing rudimentary Management Information System (MIS) that powers the loyalty program
Trigger	We have completed a discovery process to understand what it can deliver and whether we should proceed
Question	Should we proceed?

BigCo should implement SuperSys as soon as possible to strengthen the loyalty program campaigns

SuperSys will improve campaign management and flexibility	SuperSys will reduce business risk	SuperSys is compatible with all key data sources	SuperSys aligns with BigCo's strategic priorities	Funding has already been secured
• SuperSys will provide ability to manage more complex and targeted campaigns • SuperSys allows fast setup • SuperSys is flexible, being able to host rewards across multiple product lines • SuperSys will drive stronger performance reporting	• SuperSys will reduce data transfers • SuperSys will reduce manual handling and associated errors	• SuperSys accepts internal data sources • SuperSys interfaces with external data providers	• SuperSys will deliver improved customer experience with instant rewards • SuperSys will provide future adaptability	• SteerCo has approved funding • First tranche is available now

This communication worked. The manager used the storyline to structure a short verbal briefing to present to the Steering Committee. She talked the storyline through from beginning to end, stopping to answer questions when necessary, and she could deal with the tougher queries more easily because she was clear and confident in her recommendation. Surprisingly, she did not need further supporting slides as she was able to answer any question that came her way during the conversation.

This is an example of a storyline in action. It's a fairly simple example. Many of our projects involve very complex ideas. Regardless of complexity good business communication adheres to one simple maxim – developing clarity around a storyline helps drive clarity of thinking and communication. It's all about getting to the 'So what'. This book outlines seven classic storyline patterns that will help you get to the 'So what' fast.

We like to practise what we preach, so here's our 'So what' …

Storyline patterns are 'the secret' to structuring your ideas so you can succinctly convey your key points, enabling quicker decisions and better business outcomes.

These patterns emerged over time from our work with clients. In helping teams craft business communication, we started to see repeating structural patterns – all slightly different but nevertheless based around common plots, or what we now call 'storyline patterns'.

It was while working with an organisation in Australia one day that we started to think about the power of these patterns. We had been helping the team think through the structure for a complex piece of legal advice and needed a way to cut through the complexity. To do that we outlined some classic business storylines on a whiteboard and asked the team if one of those storylines was useful for the situation they faced. Seeing someone point excitedly to a storyline and say, 'That's it! It's an "options story",' we realised we were onto something, and the search for the great business storyline patterns began.

We've distilled them down to our top seven classics, which are outlined in this book. These are patterns for business communication that help you get stuff done, the stories that help you and your team make good decisions, understand complex issues, monitor activity and respond effectively to problems. These are not narratives in the literary sense, but are still stories all the same.

Once we started to share these patterns with our clients we found that they saved time while also creating more impactful and audience-focused communication. What's more, we saw our clients become confident enough to share those stories even in difficult situations. When clients took a disciplined approach to thinking through what they wanted to achieve from their communication and how they would structure and communicate it, they had more impact and achieved better results.

The seven classic storyline patterns

1   **Action Jackson** – for action plans.
2   **Close the Gap** – for improvement recommendations.
3   **Houston, We Have a Problem** – for explaining how to solve problems.
4   **The Pitch** – for pitches and proposals.
5   **To B or Not to B** – for explaining which option is best.
6   **Traffic Light** – for updates.
7   **Watch Out** – to counter emerging risks.

Our experience also tells us this approach is cross-cultural and cross-generational. It applies in Australasia, the Americas, Asia and Europe, and it works just as well for experienced professionals, board members and millennials.

Given this experience, we think these storylines are too good not to share. To unlock the power of the 'So What' strategy, you need to take five steps:

1   Understand why mastering storylining is worth the investment (chapter 1).
2   Learn how to use a storyline to identify and harness the 'So what' (chapter 2).
3   Master the seven classic storyline patterns (chapter 3).
4   Use storylines to shape the communication you share (chapter 4).
5   Introduce storylining in your business (chapter 5).

In the following chapters we will take you through these steps one by one, and also explain in detail how each storyline works and when to use each one.

We wish you all the best with your business communication.

Davina Stanley and Gerard Castles
June 2017

CHAPTER THREE

MASTERING THE SEVEN CLASSIC BUSINESS STORYLINE PATTERNS

So, now you know about the benefits of storylines and how they work, it's time to start thinking about putting them into practice. One question we often hear at this point is, 'Do you have to start from scratch and come up with a storyline for each new communication?' The answer is *no*. You can use a 'storyline pattern' to kick-start the process.

Let's see how this works …

People often talk about the seven great story structures, which include the comedy, the tragedy and the hero's journey. Well, in business – as we have said – we think there are also underlying patterns in business communication.

In this chapter we are going to examine our seven classic storyline patterns that will help you communicate your ideas in a way that is both clear and compelling. We'll explain how they work, when you should use each one, and the benefits of each approach, and we'll

provide an example of each storyline in action.* Master these and you will be well on the way to becoming a great business communicator.

We won't make you wait any longer. Here they are! The seven classic business storyline patterns are:

1 *Action Jackson* – for action plans.

2 *Close the Gap* – for improvement recommendations.

3 *Houston, We Have a Problem* – for explaining how to solve problems.

4 *The Pitch* – for pitches and proposals.

5 *To B or Not to B* – for explaining which option is best.

6 *Traffic Light* – for updates.

7 *Watch Out* – to counter emerging risks.

So, let's find out how each of them works …

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* These are examples that we have distilled from our experience and sanitised to protect the innocent, disguising names, companies and individuals as well as any figures. That said, these examples are from real experience. We've created these examples by focusing on generalities and structure and without being experts in each subject area. If you know more about the subject of a storyline than we do and think any of the content isn't quite right, please let us know so we can improve it for the next edition.

Pointers for picking and populating storyline patterns

Picking and populating a pattern can be faster and easier than starting from scratch, so we encourage you to look at our patterns at an early stage when developing your communication to see which one will best fit your circumstances. There are many ways to do this. You may like to scan the patterns to see which one 'feels right', or alternatively you may like to step back for a moment and think about your audience's needs first.

If your audience needs to know only why *or* how – or potentially *what* – needs to be done in one piece of communication, a **grouping structure** will work best. If your audience needs to know both why *and* how something should be done in one communication, you will need a **deductive storyline**.

If you're not sure, brainstorm with your colleagues to flush out your ideas further before you decide. This step will also help you clarify if you have all the information you need.

Whatever your tactic, pick a pattern that fits best and sketch your ideas into it, being mindful of the critical role each element of the storyline plays as you go.

Be careful here. Do not force fit your thinking into the pattern and sacrifice its logical integrity. If one of the patterns is not right, you may need to look for another one or potentially start building your storyline from scratch.

Whichever way you go, keep coming back to the 10-point test to keep yourself on track.

ACTION JACKSON – FOR ACTION PLANS

Sometimes we don't have to argue a case about *why* we have to act – we just have to act! That's where Action Jackson comes in. It's an action storyline, pure and simple. Action Jackson tells the audience what steps are required to implement a particular action.

To make Action Jackson work for you:

- understand that it's a simple storyline describing steps
- use it when you want to spell out an action plan
- build it to map an overall recommendation and supporting steps
- avoid using it when your audience still needs to be convinced.

Let's discuss each of these below.

Understand that Action Jackson is a simple storyline describing steps

Action Jackson couldn't be simpler! It describes actions to audiences who do not need to be persuaded, usually because they already know why something needs to be done – either it's obvious to them or they have endorsed the recommendation previously.

Let's have a look at the Action Jackson storyline.

Action Jackson pattern

We have a sound plan		
Address X with A	Address Y with B	Address Z with C
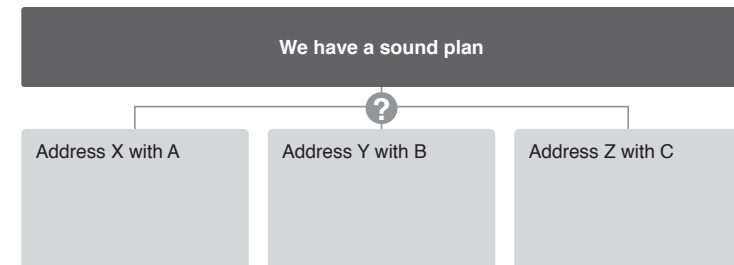
Use Action Jackson when you want to spell out an action plan

You would choose the Action Jackson storyline when you need to outline the steps you will be taking to implement a recommendation.

Like many of our other classic storylines, this might be when you need to present a paper to a senior team or a board when they need to understand how a particular strategy needs to be implemented. Or it could be the structure for a briefing in a team meeting, such as a routine team huddle.

Either way, the audience must already be convinced that action is necessary and be curious about what specific actions you are recommending.

Let's look at two examples. When thinking about how these structures might be used, we think about the 'macro' level and the 'micro' level. Macro refers to larger – often high stakes – pieces of communication, and micro is smaller, day-to-day communication. In both situations the logic must be strong and the presentation powerful.

Example: the recovery plan

Action Jackson is a great storyline structure when you don't have to convince your audience on a course of action, you only need to outline *how you will make it happen*. For example, the finance team in a large bank used the Action Jackson pattern when they had already made the case that a business unit was missing their stretch target and they wanted to explain what steps they could take to make up the shortfall.

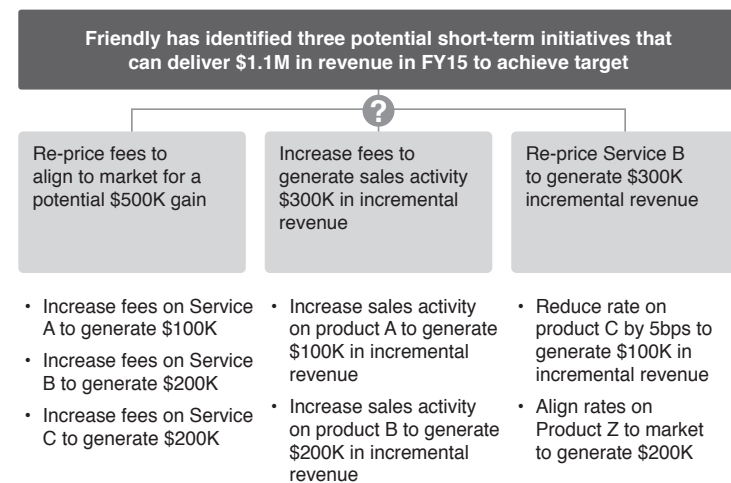You can see in the storyline on the following page that the context and trigger remind the audience of what had already been agreed. The core of the storyline outlines the steps required to close the shortfall, and then the next level of support outlines the actions required to implement each step.

The team mapped their ideas into the storyline on a whiteboard before preparing their PowerPoint pack. The pack itself had substantially more detail than this high-level storyline as the team expected the leadership to drill down into the specifics around how they could increase their service fees without upsetting their customer base and their marketing messaging.

The Friendly Bank storyline

Context	The Friendly Bank (Friendly) was set a $100M stretch target in December
Trigger	Finance has been analysing forecasts to understand whether Friendly can achieve target and found Friendly needs to identify initiatives to close out a potential $1M shortfall
Question	How can Friendly close out the shortfall?

Friendly has identified three potential short-term initiatives that can deliver $1.1M in revenue in FY15 to achieve target

Re-price fees to align to market for a potential $500K gain	Increase fees to generate sales activity $300K in incremental revenue	Re-price Service B to generate $300K incremental revenue
• Increase fees on Service A to generate $100K • Increase fees on Service B to generate $200K • Increase fees on Service C to generate $200K	• Increase sales activity on product A to generate $100K in incremental revenue • Increase sales activity on product B to generate $200K in incremental revenue	• Reduce rate on product C by 5bps to generate $100K in incremental revenue • Align rates on Product Z to market to generate $200K

Working through the storyline together in advance allowed the team to test the thinking and think through the tough questions they might be asked. From this, they fine-tuned their answers. This is a powerful way to use storylining to help push your thinking and refine your communication.

Example: the verbal team briefing

Action Jackson is a great storyline structure for short, sharp team briefings.
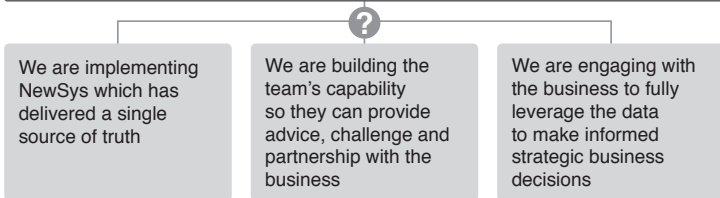
For example, one of the teams we were supporting needed to provide an update for a senior executive. The team needed to explain

the implementation plan for deploying the new system (NewSys) that would take over some of the manual data-handling aspects of their job and underpin the shift in the team's role from being technical experts to business advisers and partners. The storyline below was used to provide a quick snapshot on implementation as part of a verbal progress update.

Transformation storyline

Context	In January we updated you on our team transformation and outlined our strategy and proposed plan
Trigger	Since January we have moved well down the implementation path
Question	How has your implementation proceeded?

The Transformation program is enabling the team to shift from being technical experts to being advisers who partner with the business to solve critical problems

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We are implementing NewSys which has delivered a single source of truth	We are building the team's capability so they can provide advice, challenge and partnership with the business	We are engaging with the business to fully leverage the data to make informed strategic business decisions
• Standardising reporting and formatting to remove duplication and inconsistencies • Actively managing data to reduce risk and improve controls • Re-engineering process to deliver reports more efficiently	• Create benchmark on the data and advice we need to provide to the business • Gain access to non-financial data to underpin development of full suite solutions • Develop new financial models to underpin decision making • Design and build the capability plan to underpin new advisory role	• Create user interface for NewSys allowing self navigation through narrative, dashboards and data • Engage the business on key driver metrics to gain their buy in • Leverage the data by, for example, creating predictive models

The team mapped out the story visually, as the one-pager provided a handy reference during the conversation, both for themselves and for the executive. They chose not to prepare a more substantial document to accompany the storyline given there were few contentious issues, the project was on track, and they expected the executive to want to know more about the project rather than challenge it.

Build Action Jackson to map an overall recommendation and supporting steps

There are some key elements you must get right and some traps to avoid:

- *The introduction (the CTQ … the 'context', 'trigger' and 'question') must lead to actions* – it should remind the audience about what has already been agreed and lead to a 'how' question. But, be careful to test that the audience really does need an Action Jackson storyline and does not need convincing about *why* action is needed or *why* certain steps are required. If that were the case, you would use the Close the Gap pattern (which we look at next).

- *The 'So what' must be a statement.* It may be a recommendation – 'We should do X' – or state what's been agreed – 'We are implementing a three-month plan to deliver Y'.

- *The storyline must all be actions*, which means that each supporting idea ideally starts with a verb.

Avoid using Action Jackson when your audience still needs to be convinced

This storyline will only help you with audiences who already understand and agree that the action you are recommending is important. If they do not yet believe that, this is *not* the storyline for you. You may find other patterns such as The Pitch useful if you first want to focus on reasons only, or Houston, We Have a Problem or Close the Gap if you want to first persuade and then run through the action plan in the same conversation.

ABOUT DAVINA AND GERARD

Davina Stanley and Gerard Castles have been helping professionals use storylines for decades. Trained at McKinsey & Company in Hong Kong and in Sydney, the two spread their wings to work independently before starting Clarity Thought Partners together in 2010.

Davina is Managing Director of Clarity Thought Partners. Davina blends her education and consulting experience to design and deliver innovative and engaging programs for clients. Having begun her working life as a school teacher, she retrained and moved into corporate affairs in a multinational company before joining McKinsey in Hong Kong as a communication specialist. She worked for The Firm in a range of full-time, part-time and freelance capacities over 18 years, helping consultants clarify their thinking so they could communicate clearly with their clients. She now supports the partners and consultants from another top-tier firm, as well as many other clients.

Gerard is Co-Founder of Clarity Thought Partners. Gerard blends his straight-talking abilities with a sharp intellect and a great sense of humour to help his clients get to the point quickly. Having also begun his career as a school teacher, Gerard joined McKinsey in Sydney in 1987, where he was one of the most respected communication specialists globally. He branched out on his own seven years later to help clients with their communication and change management projects, where he has won awards for the quality of his work. Gerard is about as connected as you can get in Australian business. He has worked with people at every level of business, consulting and government, and is at times referred to in the press as a 'nameless consultant' helping 'so and so'. McKinsey still calls Gerard to help on discrete client projects.

CLARITY COLLEGE RESOURCES

Here are some tools you may find useful.

Our website (http://claritycollege.co) offers free tools to help you build your storylines:

- Blank PowerPoint templates that you can use to prepare your storylines (see the free stuff under 'courses').

- The 'Big Idea' newsletter, which offers occasional case studies and insights designed to help you master storylining in your own work (also in the free stuff section).

- Short articles, including three tips to help technical experts communicate clearly. One example is *The Tale of Two Stories*, a short article and a video describing the decision-making process required to communicate with both the board and the leadership team about the same issue. Find it at http://claritycollege.co/ engaging-multiple-audiences-the-tale-of-two-stories/

Our courses teach you how to build storylines so you can have greater influence:

- **Clarity Basics:** as the name suggests, this three-module course provides a quick, high-level tour of storylining.

- **Clarity Concepts:** this 10-module online course introduces the concepts we have discussed in detail, provides challenges to help you test your understanding and put the ideas into practice, as well as a handout for each module and access to in-depth FAQs.

- **Deductive Mastery:** this five-module course is for those who want to dig more deeply into this more complex form of storylining.

- **Clarity Cases:** this four-module course offers a quick overview of how storylining works, as well as three instructive case studies.

- **Friday Five:** designed for people who have learned about storylining before but want to refresh and test their knowledge, this six-module course is delivered by email every second Friday over three months.

Neosi storyliner (http://neosi.co) helps you map out your ideas into a storyline and then generates outlines for your papers and packs in Word and PowerPoint.