80/20 Rule Worksheet

Purpose: Identify high-leverage activities that drive results.
20 % of your activities drive 80% of your results.

1. Identify all your tasks/projects. List under "Activities".
2. Identify the impact % and time spent %.
3. Delegate, eliminate, or optimize the bottom 80% (low impact %, high time spent %).
4. Prioritize the top 20% (low time spent %, high impact %).

Activities	Impact %	Time Spent %

How To Use (Pro Tips)

Identify "Positive 20%" AND "Negative 20%"

➔ Positive 20%: What 20% of actions/customers/efforts drive 80% of the results/profits?

➔ Negative 20%: What 20% of distractions/problems/people cause 80% of wasted time and stress?

Use for Learning & Productivity:

➔ Identify the 20% of study material that gives 80% of understanding (e.g., core concepts in a subject).

➔ Find the 20% of work tasks that provide most of the impact and delegate/eliminate the rest.

Use "Stacked 80/20s" for Exponential Gains:

➔ Once you find your top 20%, apply the 80/20 rule again to that subset → Find the top 4% driving 64% of results!

Question Everything:

➔ What am I doing that feels productive but isn't?

➔ If I could only work 2 hours a day, what would I focus on?

Focus on Leverage:

➔ Instead of working harder, find what gives the biggest return per unit of effort.

Pro Tip:

➔ Every week, track where your time/money/energy goes. Identify your 20% priorities and cut distractions.

➔ Combine with delegation: If someone else can do a task at 70% of your skill level, delegate it.

Questions To Reflect On

Identifying High-Impact Areas:
- ➔ What are the top 20% of tasks or decisions that consistently deliver 80% of your desired outcomes (e.g., revenue growth, personal satisfaction, productivity)?
- ➔ In your daily routine or work process, which activities yield the highest value relative to the time invested?

Evaluating Resource Allocation:
- ➔ How can you reallocate your time, energy, or money from low-impact activities to those high-impact ones?
- ➔ Are there any habits or recurring expenses that offer minimal returns and could be reduced or eliminated?

Exploring Efficiency in Different Contexts:
- ➔ In managing your finances, which investments or spending habits contribute most significantly to your long-term stability?
- ➔ When tackling personal projects, what small, high-yield actions could be prioritized to create a bigger difference overall?

Abstraction Ladder Worksheet

Purpose: Think at different levels of detail.
1. Start with a specific problem.
2. Move up levels of abstraction (Why does this matter?).
3. Move down (What specific actions can be taken?).

The problem/decision/choice/action:
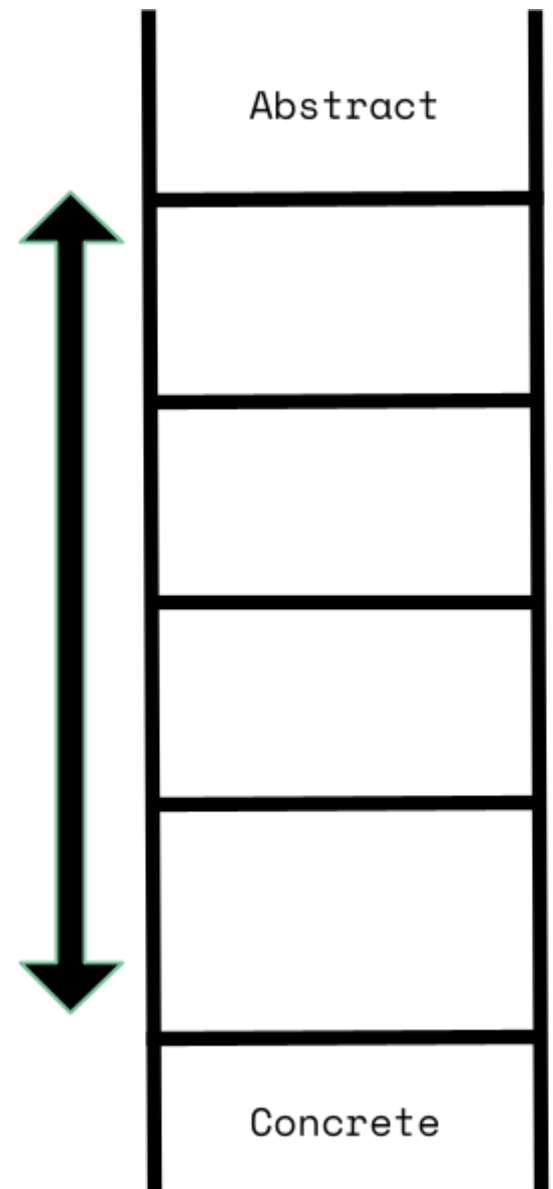
Abstract

Why does this matter? The big picture.

Are there any broad principles?

What specific actions can be taken?

Is there any specific data?

How can you put this into action?

Concrete

How To Use (Pro Tips)

Create a Visual Ladder:
➜ Draw a ladder or staircase with each step representing a level of abstraction. Label the bottom with concrete details and the top with abstract concepts. This visualization can help pinpoint where clarity is needed.

Oscillate Between Levels:
➜ Deliberately shift between high-level strategic thinking and low-level tactical details.
◆ For example, start by stating the big picture, then drill down to the immediate next step, and alternate to maintain a balanced perspective.

Identify Underlying Assumptions:
➜ Use laddering to expose assumptions hidden in everyday language.
➜ Ask "why" repeatedly until you reach the most abstract rationale behind an idea or problem.

Apply to Communication:
➜ Use abstraction laddering to tailor messages for different audiences.
➜ For technical teams, descend to detailed steps; for executives, ascend to the core vision or outcome.

Define the Problem at Multiple Levels:
➜ Begin by writing a broad problem statement, then create sub-statements that break it down into specific components.
➜ This practice ensures that no essential detail is overlooked while keeping sight of the overall objective.

Regularly Reassess:

➜ In dynamic projects, revisit your ladder to see if your assumptions still hold or if new details have emerged.

◆ Adjust your steps up or down accordingly.

Combine with Other Models:

➜ Integrate abstraction laddering with other tools.

◆ For instance, after mapping out a decision tree, use laddering to see if the underlying logic behind the branches remains consistent when viewed from a higher level.

Practice Makes Perfect:

➜ Regularly practicing abstraction laddering, such as during brainstorming sessions or after-action reviews, can sharpen the ability to switch perspectives quickly. Over time, this skill becomes second nature.

Questions To Reflect On

Moving Between Details and Big Ideas:
→ What are the concrete details or specific examples that illustrate the problem or opportunity you're facing?
→ Looking at the issue broadly, what are the underlying principles, values, or long-term goals that connect to this challenge?

Questioning Underlying Assumptions:
→ What assumptions are you making at the detailed level that might differ when viewed from a higher perspective?
→ How might your perspective change if you shifted from the minutiae (e.g., daily expenses, minute-by-minute scheduling) to the overarching strategy (e.g., financial independence, life balance)?

Connecting Levels of Understanding:
→ How does this specific challenge reflect broader trends or patterns in your life or work?
→ What insights do you gain by contrasting the detailed (micro) and the conceptual (macro) views of this issue?

Cynefin Framework Worksheet

Purpose: Categorize problems for better decision-making.

1. Define the problem.
2. Which category does it fit?
3. Choose the best approach based on category.

My problem/obstacle/decision:

Clear (Sense-Categorize-Respond)	Complicated (Sense-Analyze-Respond)
Complex (Probe-Sense-Respond)	Chaotic (Act-Sense-Respond)

How To Use (Pro Tips)

Context Assessment:
- ➔ Develop a simple assessment tool or checklist to help categorize your situation into one of the five Cynefin domains.
- ➔ Use guiding questions: "Is the relationship between cause and effect obvious, or does it emerge only in hindsight?"

Tailor Your Approach:
- ➔ In a clear domain, rely on best practices; in a complicated domain, seek expert analysis.
- ➔ For complex situations, use safe-to-fail experiments (probe, sense, respond).
- ➔ In chaos, take decisive, stabilizing actions (act, sense, respond).
- ➔ If you're in disorder, focus on gathering sufficient information to re-categorize the situation.

Dynamic Application:
- ➔ Recognize that contexts can shift over time. Regularly review your classification and be ready to adjust your management style accordingly.
- ➔ Document examples and case studies of past decisions to learn when a shift occurred and how best to respond.

Facilitate Collaborative Sensemaking:
- ➔ Use group discussions to collectively determine the domain you are operating in—diversity of perspective can prevent misclassification.
- ➔ Incorporate visual aids into team meetings to remind everyone of the current context and appropriate responses.

Questions To Reflect On

Domain Identification:
- ➔ What key characteristics of the current situation signal that it belongs to the Clear, Complicated, Complex, Chaotic, or Disorder domain?
- ➔ Which concrete examples or indicators (data, feedback, events) support your classification?

Response Strategy:
- ➔ Based on the domain, what is the recommended approach (sense-categorize-respond, analyze, probe-sense-respond, etc.)?

Assumption Check:
- ➔ What assumptions are you making about cause and effect in this context, and how could they be challenged?
- ➔ In what ways could new information force a reclassification of the situation?

Application Context:
- ➔ In a business or financial scenario, how does the framework help you decide whether to stick to standard procedures or innovate?
- ➔ For personal or team challenges, how can you leverage the Cynefin insights to tailor your problem-solving strategy?

Five Whys Worksheet

Purpose: Get to root causes.

1. State the problem.
2. Ask "Why?" five times.
3. Build on each answer.
4.   Identify the root cause.

What is the problem/decision/action/obstacle?

Why?

Why?

Why?

Why?

Why?

What is the root cause?

How To Use (Pro Tips)

Systematic Inquiry:
- ➔ Create a worksheet with a vertical chain of questions. Write the problem at the top, then below it, sequentially ask "Why did this happen?" for at least five iterations.
- ➔ Ensure each answer is specific and based on factual observations, not opinions.

Avoid Superficial Answers:
- ➔ Dig deep: if the answer seems obvious, push further with additional "why" questions.
- ➔ Sometimes it may take more than five iterations—but aim to keep it concise.

Collaborative Exploration:
- ➔ In group settings, have multiple team members contribute different perspectives to the chain.
- ➔ Compare chains to see if they converge on a common root cause.

Validation:
- ➔ Once a root cause is identified, test it by hypothesizing solutions and verifying whether addressing that cause mitigates the problem.
- ➔ Document both the process and the findings for future reference.

Questions To Reflect On

Beyond Surface Causes:
- ➔ What initial "why" seems too obvious, and how might a deeper investigation reveal an underlying systemic issue?
- ➔ Consider a recurring problem in your work or life—how might different stakeholders offer alternative "why" answers, and what does that say about the problem's complexity?

Balancing Depth with Clarity:
- ➔ At what point might asking "why" too many times risk overcomplicating the issue, and how do you decide when you've reached the core cause?
- ➔ How can you validate that the ultimate "why" truly addresses the root issue, rather than just a symptom of a broader challenge?

Uncovering Hidden Patterns:
- ➔ In what ways might the root cause you identify be interconnected with other challenges or systemic issues in your environment (such as organizational culture or financial habits)?
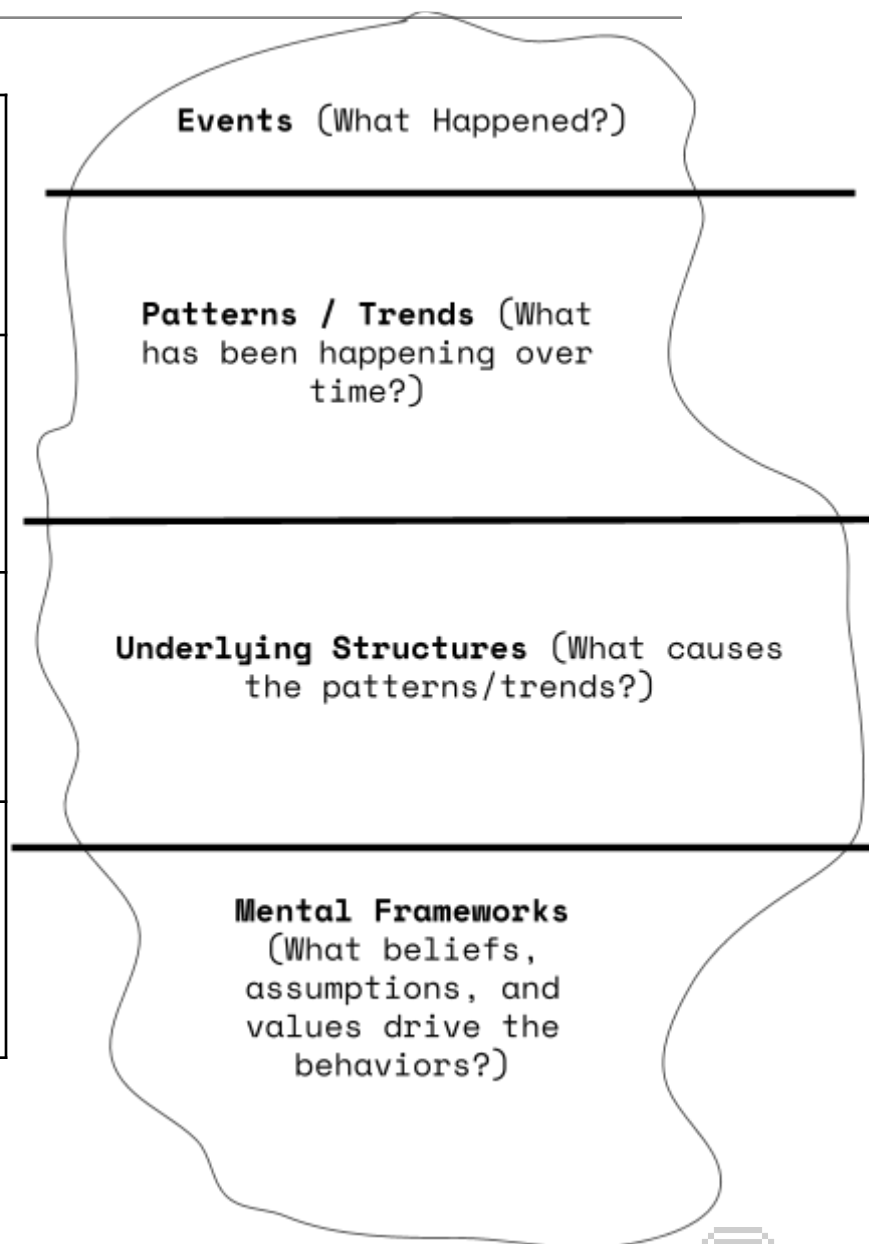
Iceberg Model Worksheet

Purpose: Analyze surface-level vs. deeper underlying issues.

1. What's the visible problem? (Tip of the iceberg)
2. What deeper causes might be driving this? (Underwater section)
3. What beliefs, emotions, or systems contribute to the issue?

Events	**Events** (What Happened?)
Patterns / Trends	**Patterns / Trends** (What has been happening over time?)
Underlying Structures	**Underlying Structures** (What causes the patterns/trends?)
Mental Frameworks	**Mental Frameworks** (What beliefs, assumptions, and values drive the behaviors?)

How To Use (Pro Tips)

Think Below the Surface:
- ➔ Most problems aren't about what's visible. The root cause is below the surface.

Apply the 3 Layers of Depth:
- ➔ **Event (What happened?)** → "Sales dropped this quarter."
- ➔ **Pattern (What trends exist?)** → "Sales drop every Q3."
- ➔ **Structure (What's causing it?)** → "Seasonality + weak marketing."

Use for Personal Development:
- ➔ If you struggle with productivity, the surface issue may be procrastination—but the deeper cause may be fear of failure.

Don't Fix Symptoms, Solve Root Problems:
- ➔ **Keep asking:** "What's beneath this?"
- ➔ **Example:** If employee morale is low, don't just add perks—fix underlying leadership and communication issues.

Pro Tip:
- ➔ Whenever you see a problem, ask: "What's deeper than this?" three times.
- ➔ If solving a recurring issue, focus on patterns, not one-time events.

Questions To Reflect On

Seeing Beyond the Surface:
- → What are the visible symptoms in your current challenge, and what deeper cultural, psychological, or systemic factors might be driving them?
- → How might your immediate reactions be influenced by unseen beliefs or values embedded in your organization or personal habits?

Connecting Disparate Layers:
- → In a financial or operational context, how do underlying policies, unspoken assumptions, or historical trends create the "submerged" part of the iceberg?
- → How can you map the relationship between these underlying factors and the surface issues to design more sustainable interventions?

Challenging Long-Standing Norms:
- → What elements of your current environment have remained unchanged despite recurring issues, and what does that suggest about entrenched systems or mindsets?
- → How can you use the iceberg perspective to disrupt complacency and foster a culture of deep, systemic change?

INVERSION WORKSHEET

Purpose: Solve problems by flipping them (e.g., "How can I fail at this?").

1. What's your goal?

2. What are all the ways you could fail at achieving this?

3. How can you prevent those failures?

Desired outcomes?   What would cause failure?

How To Use (Pro Tips)

Ask: "How Can I Fail?" Instead of "How Can I Succeed?"
  - ➔ If your goal is getting fit, list ways to fail: "Eat junk, avoid exercise, ignore sleep."
  - ➔ Now, do the opposite to succeed.

Use for Problem-Solving in Business & Life:
  - ➔ Sales Strategy: Instead of "How do I sell more?" ask, "How do I lose customers?" (e.g., bad service, slow response).
  - ➔ Productivity: Instead of "How do I focus?" ask, "How do I destroy focus?" (e.g., notifications, multitasking). Remove distractions.

Use "Elimination Thinking" to Improve Performance:
  - ➔ Instead of adding solutions, remove problems.
  - ➔ Example: Instead of "What can I do to be healthier?" ask, "What am I doing that's unhealthy?"

Think in Worst-Case Scenarios & Stress-Test Your Plan:
  - ➔ If launching a project, ask: "What could go horribly wrong?"
  - ➔ Use that list to prevent failure.

Combine with 80/20 Rule:
  - ➔ Instead of finding the top 20% that works, identify the bottom 20% that ruins progress—and eliminate it.

Pro Tip:
  - ➔ Use inversion to challenge assumptions. Instead of asking, "How do I succeed?" ask, "How do I guarantee failure?"
  - ➔ Sometimes, removing the bad is more powerful than adding the good.

Questions To Reflect On

Flipping Assumptions:

➔ What would a plan look like if you set out to guarantee failure rather than success? Which critical elements become glaringly obvious as you reverse-engineer the worst-case scenario?

➔ How do your current assumptions about success blind you to potential risks, and how might inversion reveal hidden vulnerabilities?

Designing for Failure:

➔ Imagine you deliberately designed your strategy to fail—what would you do differently, and how could that inform a more robust, resilient approach?

➔ What "anti-best practices" emerge when you ask, "How can I ensure this project fails?" and how can those insights be used to safeguard against those pitfalls?

Uncovering Radical Insights:

➔ How might thinking in reverse help you identify opportunities that a standard, forward-thinking approach would miss?

➔ Reflect on a past decision—what if you had inverted your thinking? What alternative strategies might have emerged, and how could they have improved the outcome?

Six Thinking Hats Worksheet

Purpose: Improve problem-solving by considering different perspectives.

1. State the problem/situation.
2. Go through each hat and write insights.
3. Summarize key takeaways and next steps.

What is the problem/situation/action?

Approach it with the white hat. (facts and data)

Approach it with the red hat. (feelings and intuition)

Approach it with the yellow hat. (optimism and benefits)

Approach it with the black hat. (critique and weaknesses)

Approach it with the green hat. (creativity and novelty)

Summarize with the blue hat. (reflection and process)

How To Use (Pro Tips)

Structure and Facilitation:
➔ Begin and end with the Blue Hat to set the agenda and summarize insights.
➔ Use a physical or digital template (like colored sticky notes or an online board) so each hat's role is clear.
➔ In group settings, assign a moderator to help switch hats on time and ensure everyone adheres to the current perspective.

Dedicated Time for Each Perspective:
➔ Allocate specific time slots (e.g., 2-3 minutes per hat) so participants can dive deep without feeling rushed.
➔ Encourage a pause after each hat to record ideas before moving on.

Flexibility in Application:
➔ Choose only the hats relevant to the discussion if time is short, but remember that the full cycle can uncover hidden opportunities.
➔ Rotate the hats among team members to get varied viewpoints and prevent any one perspective from dominating.

Emotional and Data Balance:
➔ Use the Red Hat briefly for gut reactions without overanalyzing, and then shift to fact-based White Hat thinking.
➔ Balance creative (Green) and cautious (Black) perspectives to spark innovation without ignoring potential pitfalls.

Questions To Reflect On

Diverse Perspectives:
- ➔ For each hat (White, Red, Black, Yellow, Green, Blue), what specific questions can you ask to fully explore that particular lens in the context of a complex problem?
- ➔ How do the insights gathered from each hat challenge or reinforce your current assumptions about the issue?

Integration and Synthesis:
- ➔ After cycling through all six hats, what are the key common themes that emerge, and how can they be synthesized into a coherent strategy?
- ➔ How might conflicting perspectives (e.g., the Red Hat's emotions vs. the Black Hat's caution) be reconciled to form a balanced decision?

Application in Real Scenarios:
- ➔ In a business meeting, how can you structure the exercise so that every participant is fully engaged, ensuring that each hat's insights are captured?
- ➔ Reflect on a recent conflict or challenge: how might using the Six Thinking Hats have provided a more rounded understanding and a creative solution?