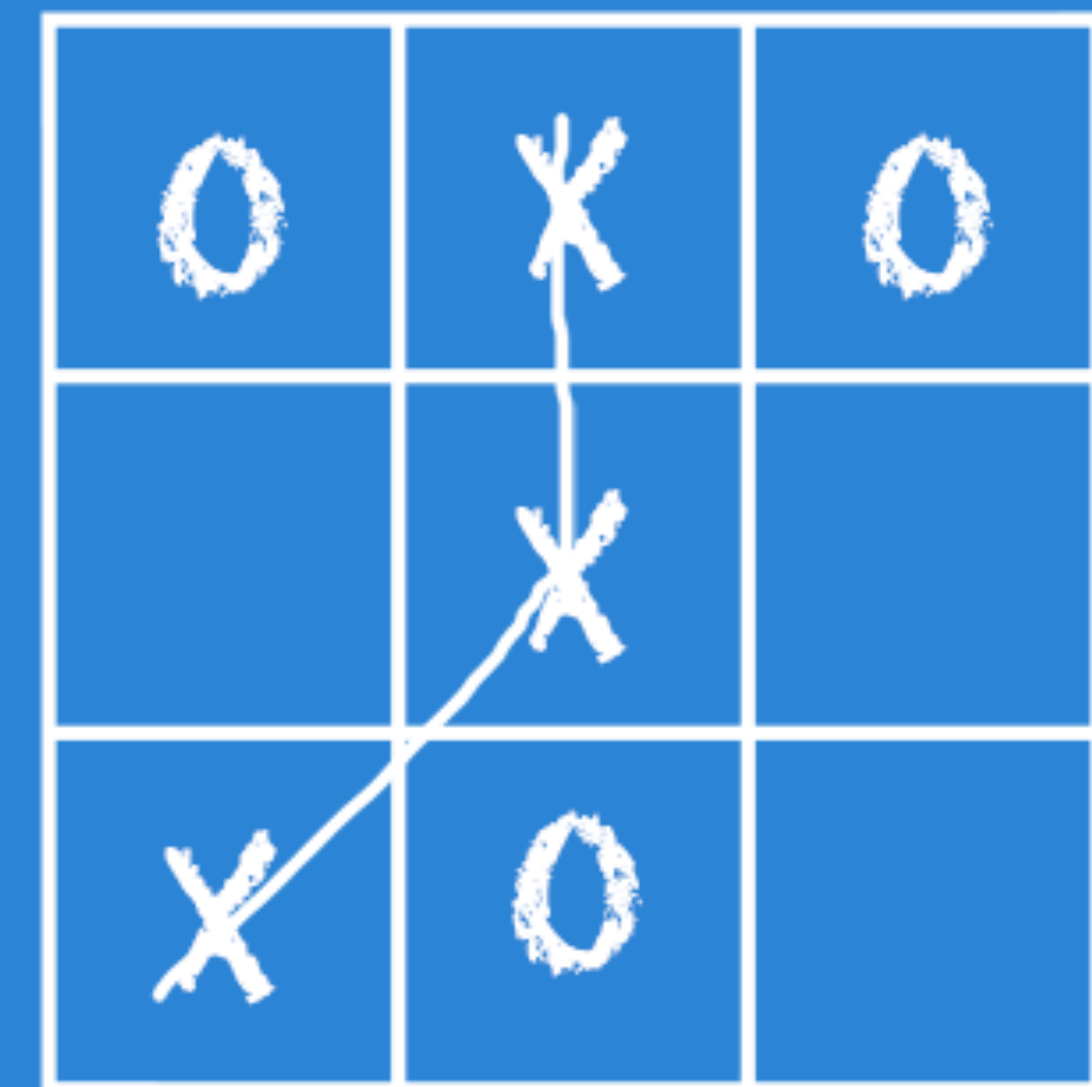


# THE STRATEGY MATRIX

By Adam James Lamagna  
Senior Digital Strategist  
[unstrategic.com](http://unstrategic.com)



 **STRATEGIC**

# What is the Strategy Matrix...

Strategy is bottomless; strategy is always changing dependent on goals, new stakeholders, market forces, and other miscellaneous items. As web strategists, we need to be able to understand the environment in which strategy develops.

This template will act as a guide to help you break down digital strategic initiatives. Since strategy is not linear, we can't approach it as a linear process. We should approach it as a surrounding medium or structure that can be shaped.

The Strategy Matrix is designed to outline the flow of strategy. If we understand all the elements and variables of strategy, and the tactics which can get us closer to our results, then we can make better informed decisions, which will materialize into good recommendations for our clients.



# The Strategy Object & Entity

1

**DISCIPLINARY**

A branch of knowledge; of or relating to a particular field of study

2

**PROCEDURAL**

A series of steps; relating to an established or official way of doing something

3

**TACTICAL**

Carefully planned and executed; activity required to uncover a specific result



1

**ENTITY**

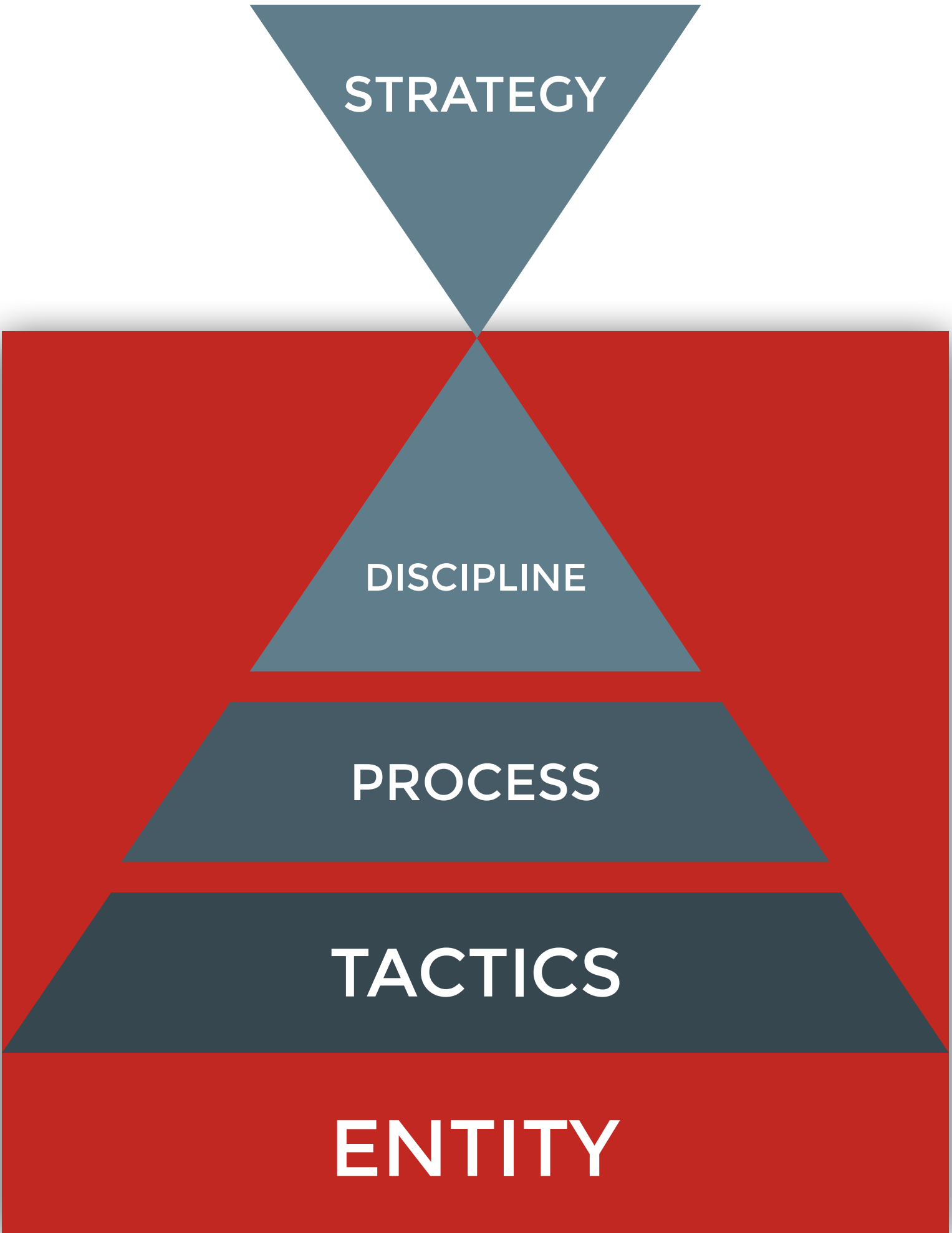
Digital strategy needs to sit in context of an entity (usually a business, brand, project, etc.), otherwise it has no meaning



0

**STRATEGIC**

A plan of action; relating to the identification of overall interests and the means of achieving them - this will form results

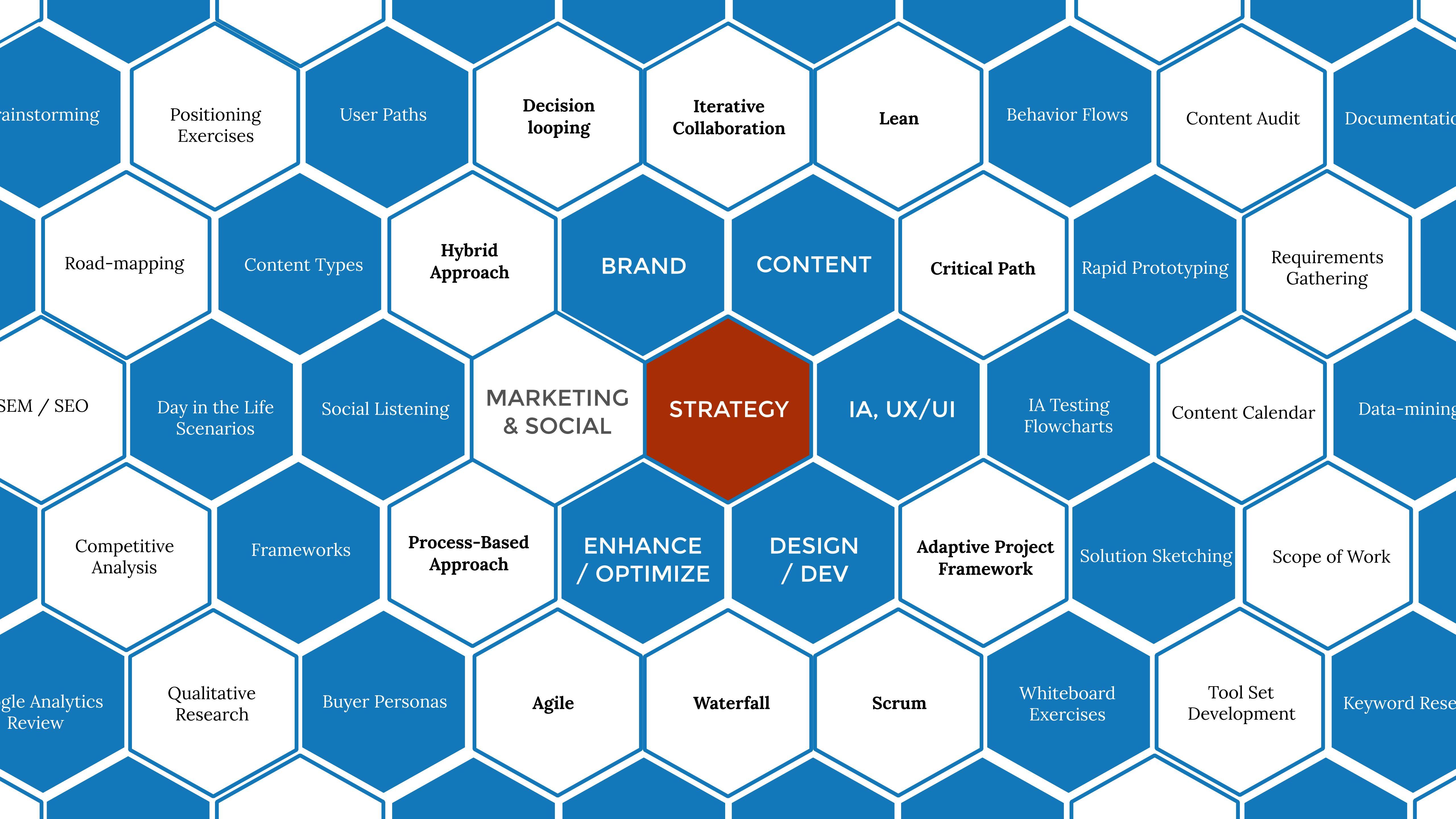


SECTION

1

# THE OBJECT

Strategy from a Bird's Eye View





## Layer #1: Disciplinary

The first layer of digital strategy is discipline. There are many types of digital disciplines including brand, content, design, marketing, etc., which will feed into a company's bigger business strategy. This layer will help you (the strategist) decide who needs to be involved from your team

Disciplines (just a few):

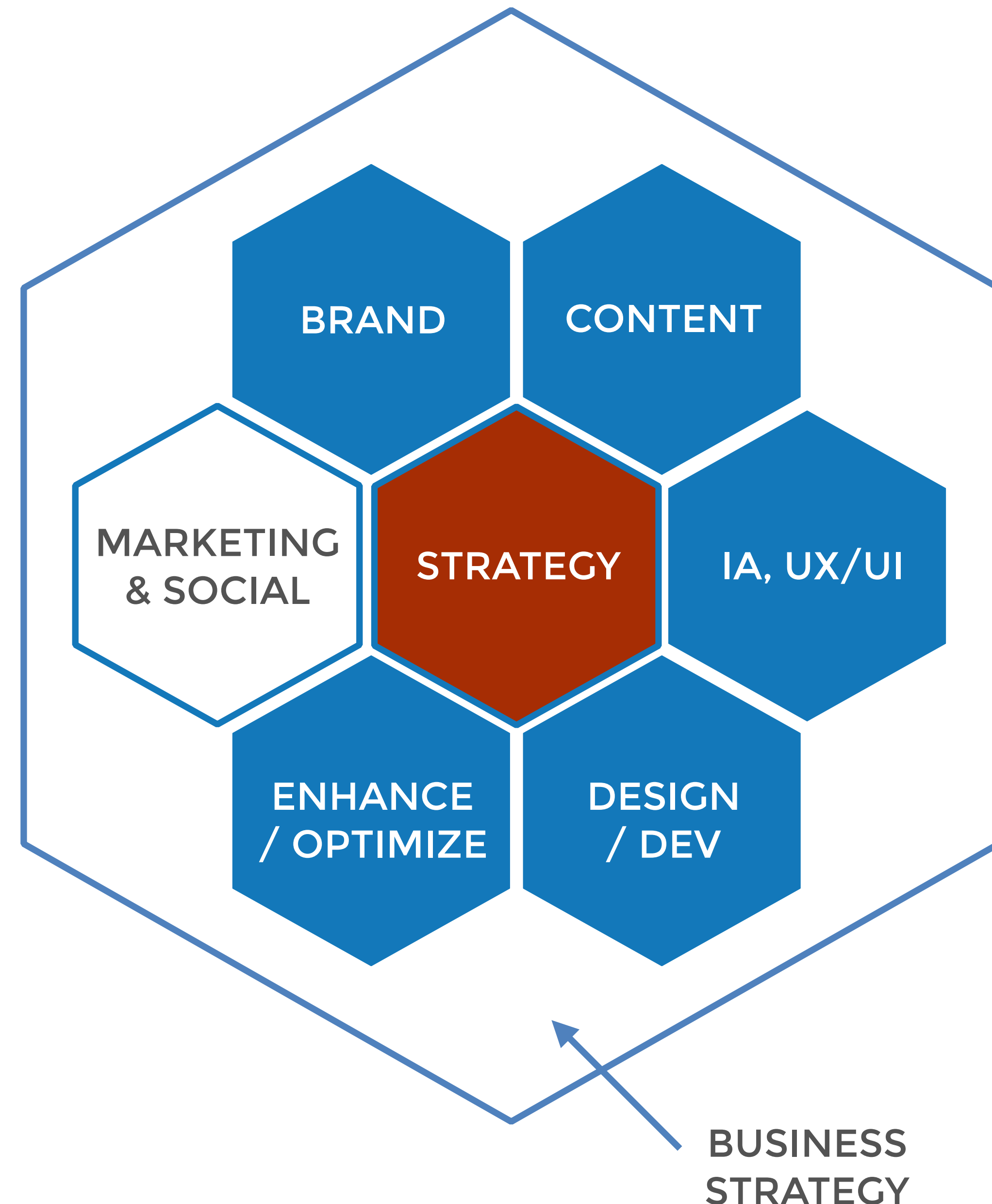
**Brand** - long-term plan for the development of a successful brand

**Content** - creation, planning, and distribution of useful and usable content

**UX/Design** - understanding web users (behaviors/habits) and how that will effect the performance of a website/digital product

**Marketing** - long-term, forward looking approach to achieving a sustainable competitive advantage

**Enhance/Optimize** - continually optimizing and enhancing websites to stay ahead (or keep up with) the market



## Layer #2: Procedural

The second layer will consist of your approach to the current initiative. A process is a series of actions or steps taken in order to achieve a particular result.

Approaches (just a few):

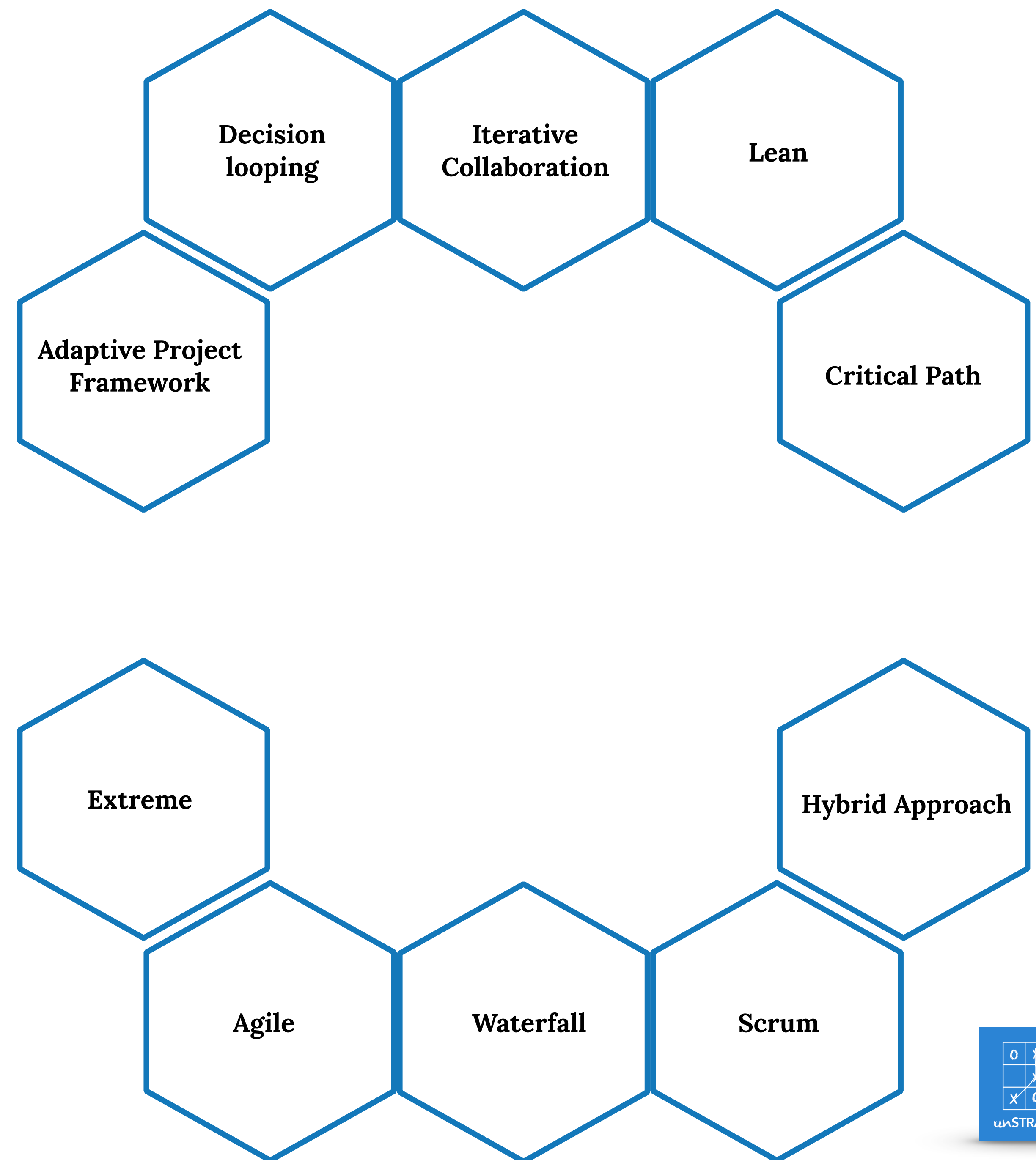
**Critical Path** - determines which activities are “critical” and which activities are not

**Decision-looping** - cycles through the steps of data, analysis, decide, and act

**Agile** - evolving requirements and solutions through ongoing collaboration

**Waterfall** - linear sequence approach completing the previous step before moving to the next

**Epicenter** - starting with the root of the problem and working outward toward a solution



## Layer #3: Tactical

The third layer consists of all the exercises, tactics, and techniques we can use to help uncover the correct solution. We'll be focusing on many of these activities throughout Season Two of unSTRATEGIC.

Tactics (just a few):

**Road-mapping** - defining the current state, defining the ideal state, and mapping a path between these two points

**Behavior Flows** - flowcharts to express the path visitors take while navigating a website

**Content Audit** - starting with a content inventory, use qualitative analysis to determine if the content addresses the goals set forth by the client/brand

**Social Listening** - monitoring digital conversations to understand what customers are saying about a brand or industry

**Analytics Review** - used to review a website's performance and evaluate the effectiveness of website design

Brainstorming

Positioning Exercises

User Paths

Behavior Flows

Content Audit

Documentation

Road-mapping

Content Types

Rapid Prototyping

Requirements Gathering

SEM / SEO

Day in the Life Scenarios

Social Listening

IA Testing Flowcharts

Content Calendar

Data-mining

Competitive Analysis

Frameworks

Solution Sketching

Scope of Work

Google Analytics Review

Qualitative Research

Buyer Personas

Whiteboard Exercises

Tool Set Development

Keyword Research



SECTION

2

| THE ENTITY  
Strategy in Context

# Strategy Entanglement

Quantum entanglement is a physical phenomenon that occurs when groups of particles interact in ways such that the quantum state of each particle cannot be described independently of the others, even when the particles are separated by large distances. Simply put, the state of each particle improves our knowledge of the next one. Strategy is similar.

In order to understand strategy, you need to look at it holistically. Your business strategy (known as the macro-strategy) is comprised of micro-strategies that include web, mobile, social, brand, content, and more. But you should also consider the elements that make up the business (or the entity), their market, and their industry.



# Websites do NOT operate in silos!



**This means that the performance of websites are dependent on other channels not just the website itself.**

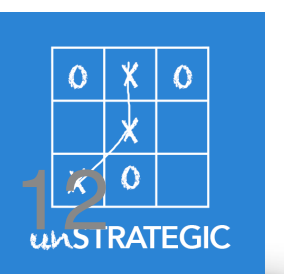
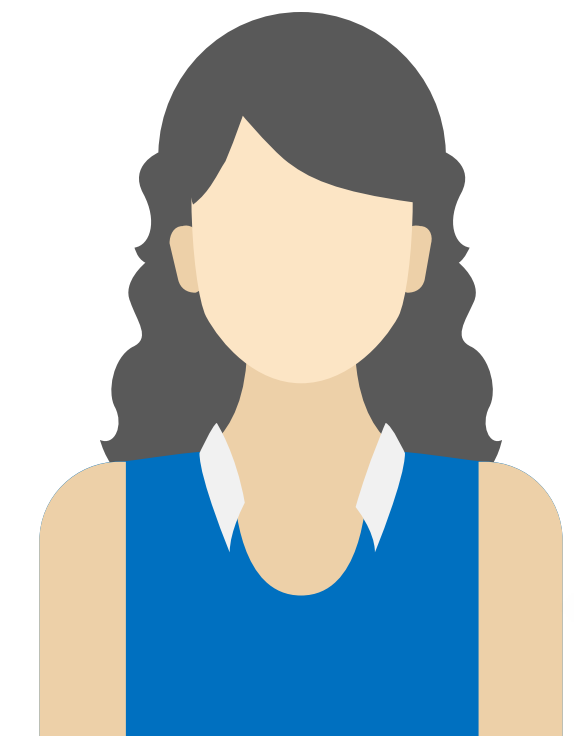
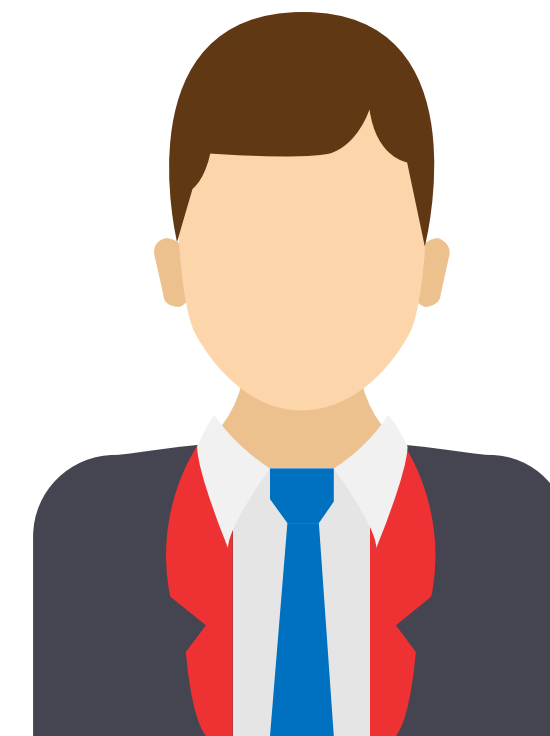
In order to give real strategic insights, you have to look at and analyze these other channels and impacts. It could be what's currently happening in the market, or how user behavior has changed, or which social channels have the furthest reach. By doing this you create a more holistic picture of your clients market, where they are positioned, and how best to help them.

# Understanding Valuable Data

In the context of account management and strategy, we need to understand and evaluate our clients business world. This means revenue streams, marketing mediums, competitors, their industry, and any miscellaneous data that might be valuable to our initiatives. Keep in mind, that most business goals revolve around increased revenue, increased value, and increased visibility.

The data that most clients and businesses value are:

- **Revenue** - increasing revenue streams or lines of business
- **Marketing** - understanding and providing more value for users
- **Competition** - gaining competitive edges
- **Industry** - market forces that impact the industry
- **Miscellaneous** - any data including research, articles, press releases, stakeholder concerns, and more



# Available Data

## GENERAL DATA

What data is available about the business?

### REVENUE

Service Lines  
Products, Apps. etc.  
Ecommerce Platform & unique features

### MARKETING

Generalizations about users and customers  
Reviews, Distribution Channels/Mediums

### COMPETITION

Generalizations about competitors,  
competitive collateral & systems used

### INDUSTRY

Generalizations about the industry, its  
trajectory, market forces, etc

### MISC

Research outlets, press outlets,  
organizational structures

## SPECIFIC DATA

What data is available within the business?

### REVENUE

Profitability on service lines/products,  
Performance reports, Product reports,  
Revenue reports etc.

### MARKETING

User Personas, Affinity/Demographic data,  
Buyer's Journeys, Social reports, PPC  
campaigns

### COMPETITION

Flow of a competitor's website, social  
channel analysis

### INDUSTRY

Industry Trends, Disruptors, and Influencers  
Industry trend reports

### MISC

Studies, articles, research papers, surveys  
etc. Stakeholder concerns





SECTION

3

# THE MATRIX

Providing Structure for Strategy

# UNDERSTAND THE ENTITY

CLIENT'S  
BUSINESS

Revenue

Marketing

Competitors

Industry

Misc.

GENERAL DATA  
—  
SPECIFIC DATA

GENERAL DATA  
—  
SPECIFIC DATA

GENERAL DATA  
—  
SPECIFIC DATA

GENERAL DATA  
—  
SPECIFIC DATA

GENERAL DATA  
—  
SPECIFIC DATA

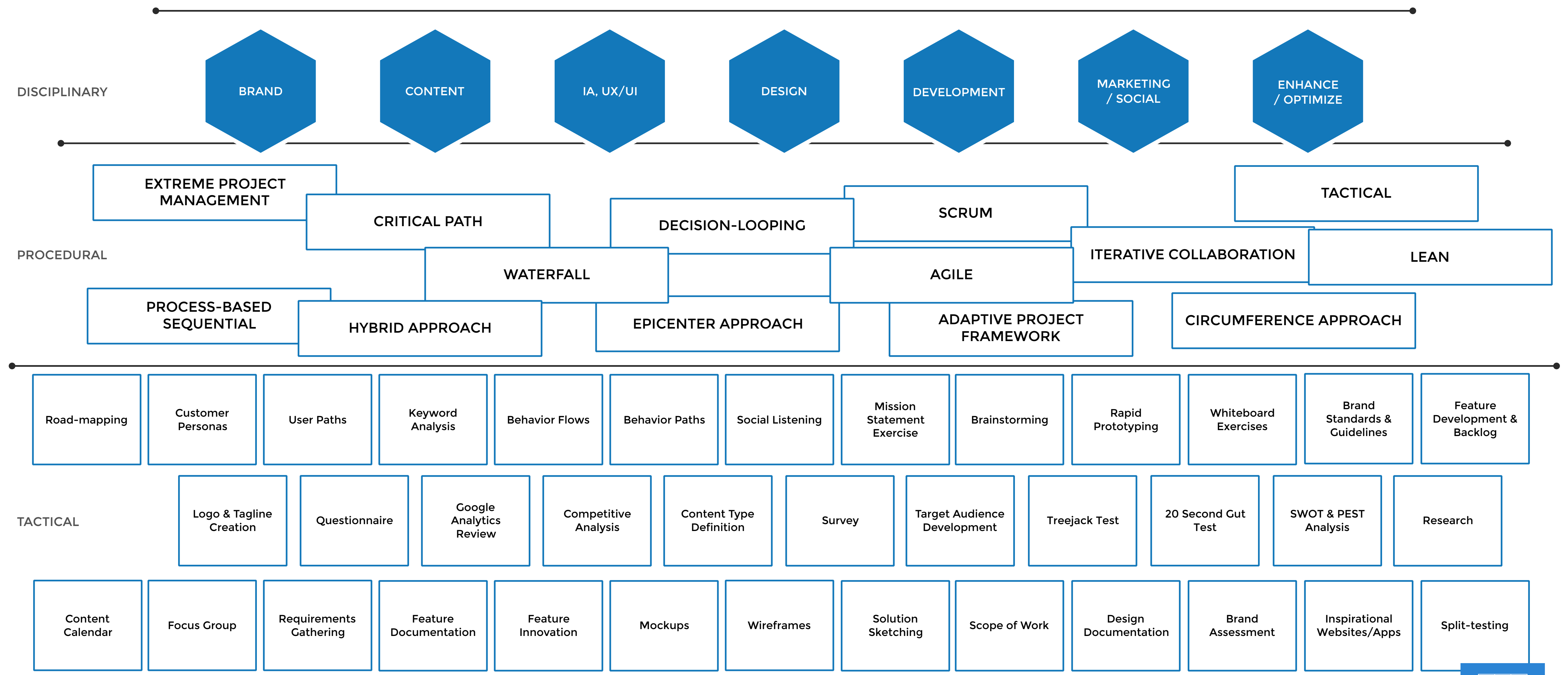
REVENUE

VALUE

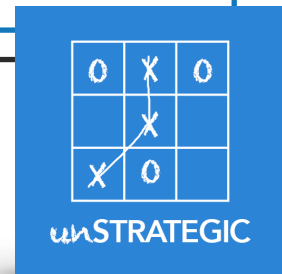
AWARENESS

UNDERSTANDING THE ENTITY WILL HELP YOU UNCOVER WHICH DISCIPLINES TO FOCUS ON

# UNDERSTAND THE OBJECT



UNDERSTANDING THE OBJECT WILL HELP YOU SHAPE YOUR STRATEGY AROUND THE ENTITY'S NEEDS

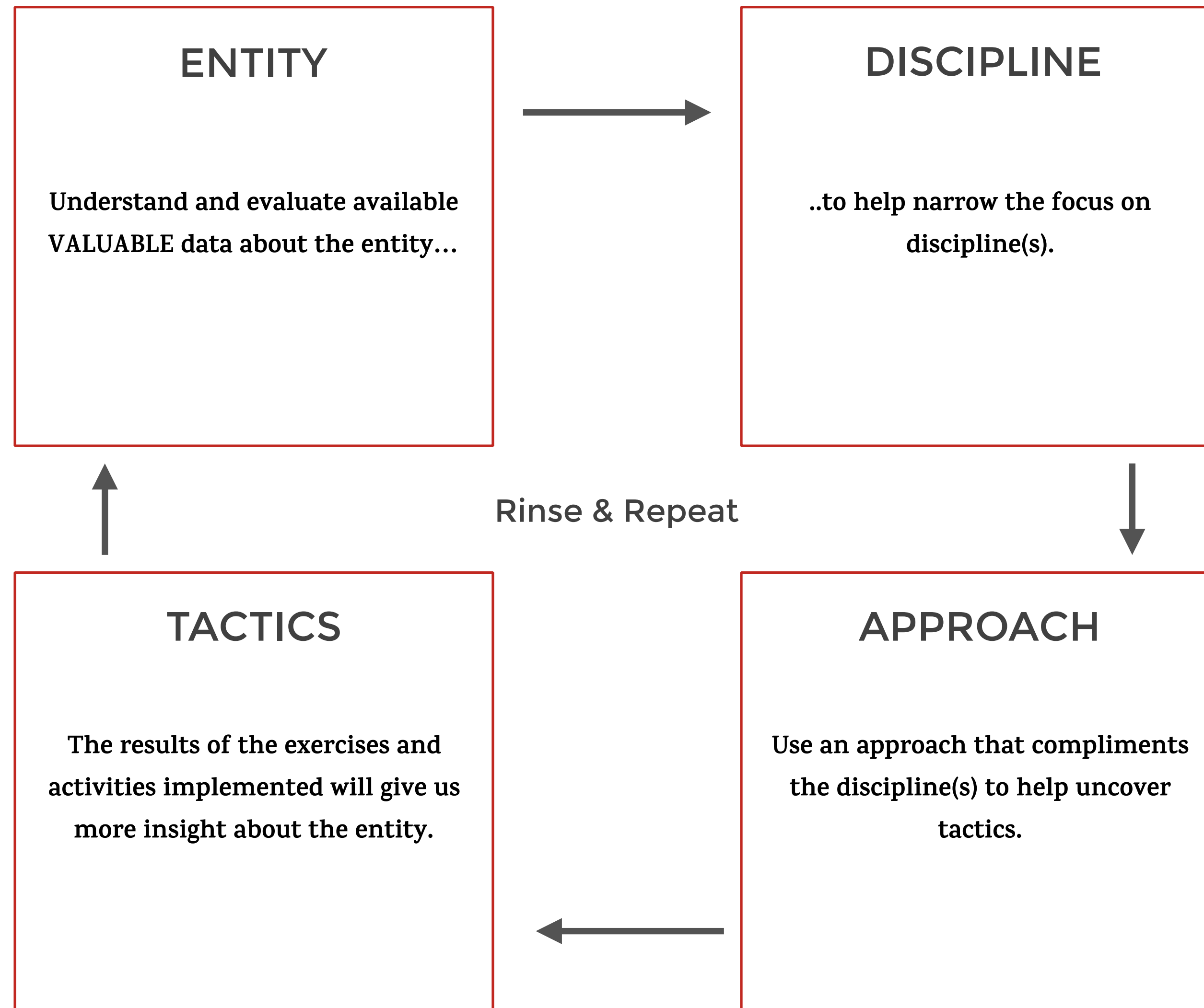


SECTION

4

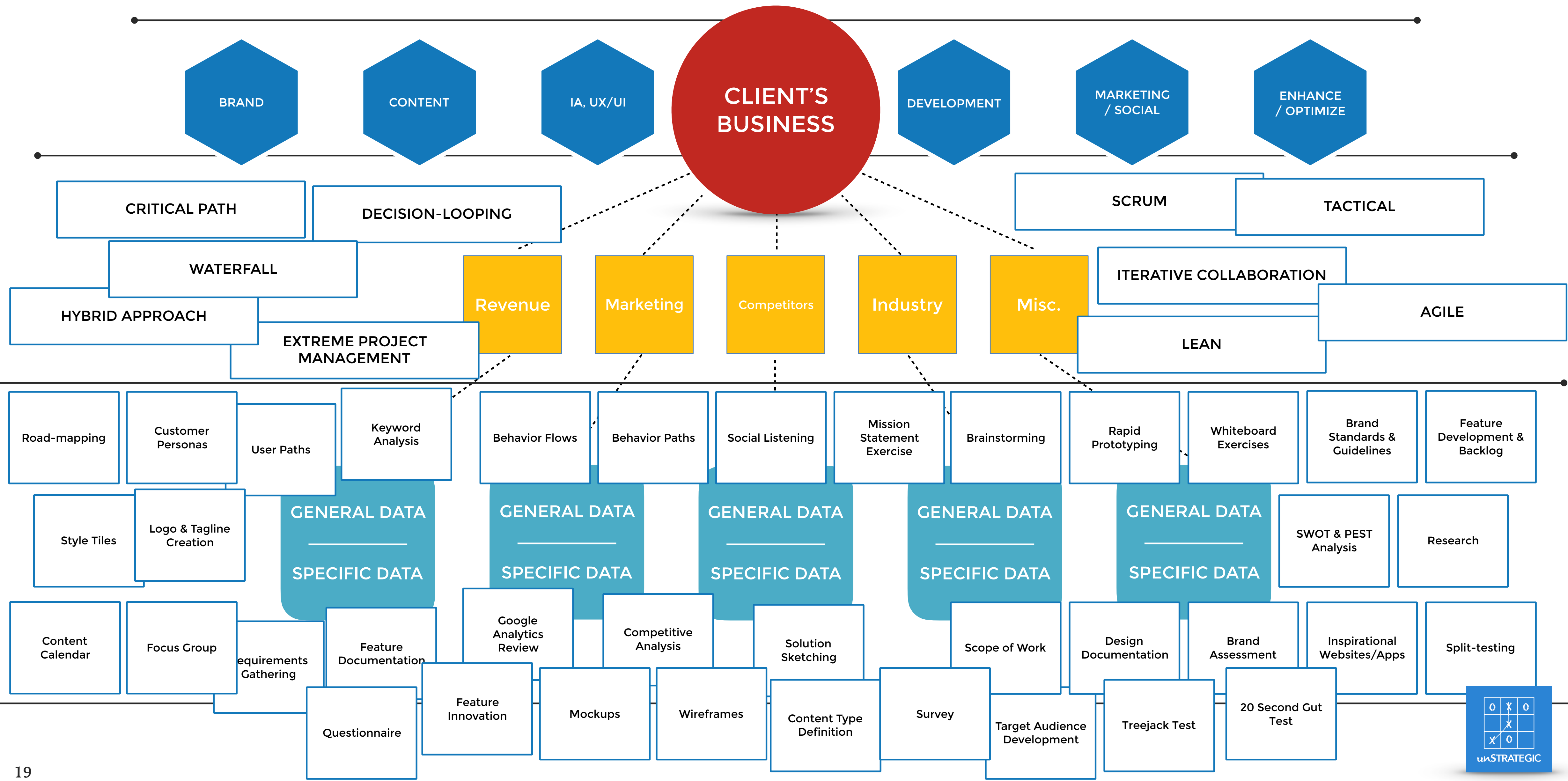
| RECAP  
Combining it Altogether

# Cycling through the Motions





# THE STRATEGY MATRIX



# TACTICS

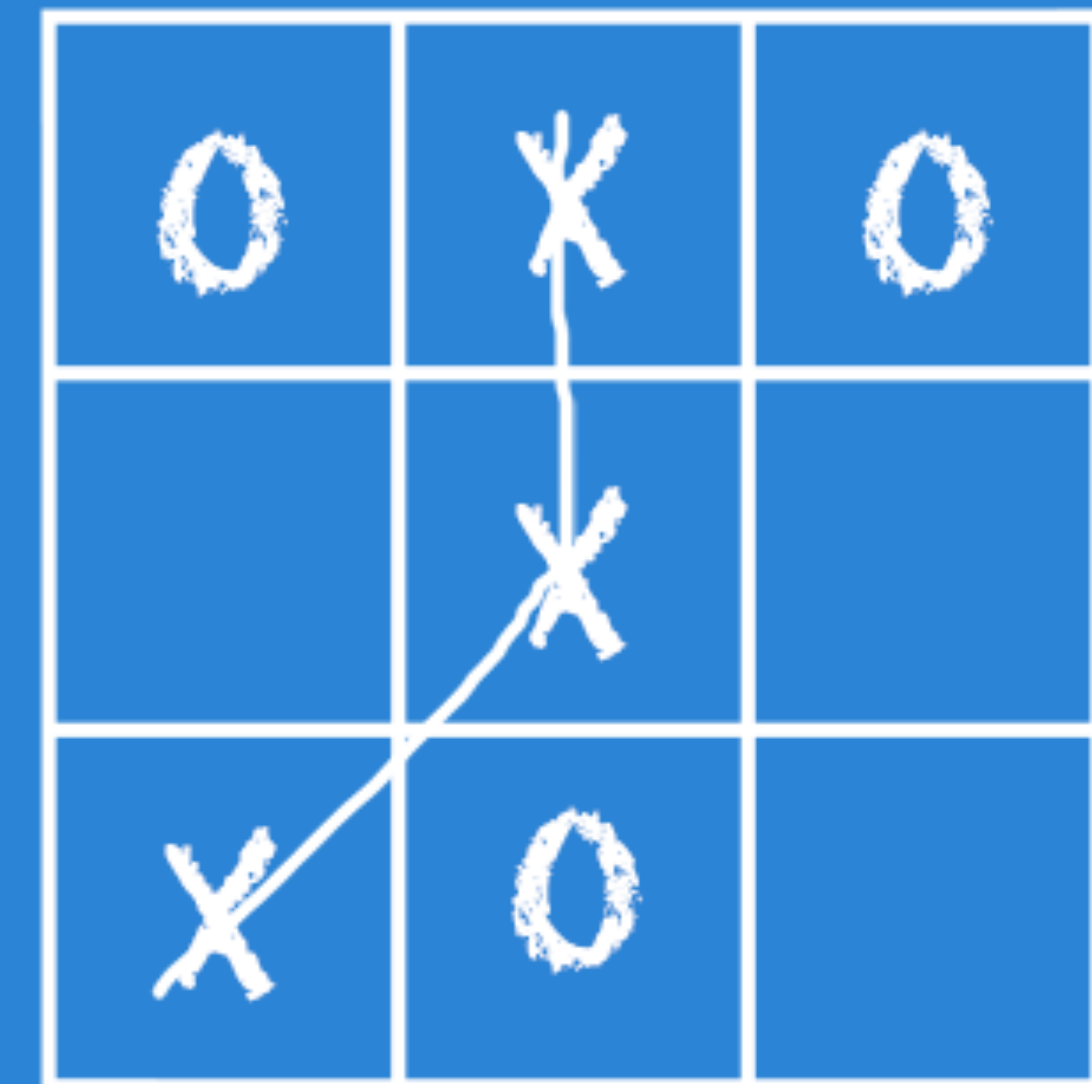
Goals Workshop	Feature Tournament Bracket	Business vs. Design	Pattern-Breaking Exercises	Card Sorting	Opening Questions	Dot Voting	Museum Art	Choose the Parents	Elevator Pitch	Reverse Questioning	Hot or Not	Fire Starting
	Model Making	Improv	Affinity Mapping	Empathy Mapping	Content Type Definition	Closing Questions	Contextual Mapping	Heuristics	Mission Impossible	PEST Analysis	Value Mapping	
Story Boards	Vision Boards	Mood Boards	Pain vs. Gain	20 / 20s	Hypotheticals	Who, What, When, Where, Why	Memory Boards	Cover Story	Technology Documentation	Project Assessment	Vision Statement	Core Values
Road-mapping	Customer Personas	User Paths	Keyword Analysis	Behavior Flows	Behavior Paths	Social Listening	Mission Statement Exercise	Brainstorming	Rapid Prototyping	Whiteboard Exercises	Brand Standards & Guidelines	Feature Development & Backlog
TACTICAL	Logo & Tagline Creation	Questionnaire	Google Analytics Review	Competitive Analysis	Content Type Definition	Survey	Target Audience Development	Treejack Test	20 Second Gut Test	SWOT Analysis	Research	
Content Calendar	Focus Group	Requirements Gathering	Feature Documentation	Feature Innovation	Mockups	Wireframes	Solution Sketching	Scope of Work	Design Documentation	Brand Assessment	Inspirational Websites/Apps	Split-testing

WE'LL BE DIVING INTO SPECIFIC TACTICS THROUGHOUT THIS SEASON THAT WILL HELP YOU BECOME A BETTER DIGITAL STRATEGIST



# THE STRATEGY MATRIX

[unstrategic.com](http://unstrategic.com)



**unSTRATEGIC**