

SAVE
THIS
ONE

CONSULTING MOVES 003 • TOOLKIT

Build less. Change more.



Six tools for designing the
smallest thing that works.

Start with what people need to **do**.

Then work backwards to the least you can build to help them do it.

WORTH REMEMBERING

The importance of a topic is a weak reason, on its own, to build a course.

These tools pick up where Consulting Moves 001 left off: once you know the cause.

TOOL 01 · MATCH THE FIX TO THE CAUSE

Each cause has its own **fix**.

Can't do it

SKILL OR KNOWLEDGE



Practice, coaching, experiences, learning

Don't do it

MOTIVATION, CONSEQUENCES



Feedback, recognition, manager follow-through

Can't easily do it

SYSTEMS, PROCESS, TOOLS



Fix the workflow, the tool or the access

Don't know they need to

EXPECTATIONS, CLARITY



Clear standards, prompts, regular feedback

Learning reaches the first cause best. The others usually need a change to the work itself.

TOOL 02 • THE FOUR ZONES

Place support where the need happens.

01 • BEFORE

Get ready

Expectations, foundations and practice ahead of the moment.

02 • IN THE MOMENT

Do the work

Prompts, tools, checklists and AI help, right when it's needed.

03 • AFTER

Get better

Feedback, reflection, coaching and more practice.

04 • AROUND

Make it easy

Managers, process, systems, incentives and standards.

Use only the zones the problem needs. Most needs that show up mid-task are best met in the moment.

TOOL 03 • THE ACTION TEST

Every piece must change something someone does.

ASK OF EVERY ELEMENT

"What will someone say, do, decide or produce differently because of this?"

If the answer is vague, the element is probably decoration. Take it out.

TOOL 04 · THE SMALLEST THING THAT WORKS

Seven checks before you build.

-
- ☐ Does something suitable already exist?
 -
 - ☐ Could a tool do the job content was going to do?
 -
 - ☐ Could support sit inside the work itself?
 -
 - ☐ Could practice replace more explanation?
 -
 - ☐ Could a manager action replace a campaign?
 -
 - ☐ Could the process or system simply be fixed?
 -
 - ☐ Will this solve the cause, or just look busy?

More complex rarely means more effective.

TOOL 05 · WHAT WON'T WORK HERE

Name what you're leaving out.

Saying why an option won't reach the cause builds trust, and stops it creeping back in.

[Option] won't reach this cause,
because [the cause sits here].
Instead, [what will].

EXAMPLE

"A module won't reach this, because people already know the rule. The friction is finding the price list. Instead, put the prices inside the quoting tool."

WORKED EXAMPLE

Quotes are going out with old prices.

Cause: the new price list lives in a separate file people struggle to find. Some don't know which products changed.

BEFORE

A 10-minute team huddle on what changed and why.

IN THE MOMENT

Current prices built into the quoting tool. An AI helper for edge cases.

AFTER

A weekly spot-check of five quotes, with quick feedback.

AROUND

Retire the old file. Managers review each person's first few quotes.

LEFT OUT · a 45-minute pricing module. People know prices changed. The friction is finding them.

TEST IT →



TOOL 06 · PILOT CARD

Test small. Then **scale.**

HYPOTHESIS	What we believe will change e.g. Quotes use current prices
GROUP	Who gives the most useful test e.g. One sales team, two weeks
SMALLEST VERSION	The least we can build e.g. Prices in the tool + huddle
EVIDENCE	What we'll observe e.g. % of quotes with correct pricing
DECISION	What we'll do with the result e.g. Scale, adjust or rethink

Measure what people do. Satisfaction alone tells you little.



AI PROMPTS

Design with a thinking partner.

FILL THE ZONES

The gap is [paste] and the cause is [paste]. Suggest options for before, in the moment, after and around the person.

SHRINK IT

Here's my plan: [paste]. What's the smallest version that would still reach the cause? What could I remove?

EXPLAIN IT

Turn this plan into three plain sentences for a busy executive: what's happening, what will help, and what we'll test first.

Weigh accuracy and privacy before AI goes into the workflow itself.



CHEAT SHEET · SCREENSHOT THIS

Build less in six moves.

-
- 01** MATCH IT
Fix the cause you found. Learning for skill, change the work for the rest.
-
- 02** PLACE IT
Before · in the moment · after · around.
-
- 03** TEST IT
"What will someone do differently because of this?"
-
- 04** SHRINK IT
Seven checks before you build anything new.
-
- 05** LEAVE IT OUT
"[Option] won't reach this, because... Instead..."
-
- 06** PILOT IT
Hypothesis · group · smallest version · evidence · decision.
-

Build less. Change more.



The fewest interventions that change
what people do.

ALSO IN THE SERIES • 001 THE BRIEF IS A HYPOTHESIS • 002
YES, AND. YES, IF.



Danny Batts
Practice —Upgrade

[Get the toolkits ↗](#)