

Design Clarity

Thinking Tools Starter Pack

Free edition · examples followed by printable worksheets

01 Decision Record

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03 Meeting Note

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Meeting today? Use the Meeting Note.

A decision to make? Use the Decision Record.

You do not need to start on page one.



A document users have to rotate every time

A system generates a Word document with a wide table. The web preview shows the full table, but the downloaded file opens in portrait and cuts off the right-hand columns. Users have to switch the page to landscape before they can continue working.

What the team assumed

The web preview had to stay portrait, so the exported file would need a separate landscape layout.

What users actually needed

They did not ask for two layouts. They needed to read the whole table without reformatting the file first.

What was decided

Use landscape in both the web preview and the downloaded file.

What the change still required

The code change was small, but preview, export, print and regression testing still had to be completed.

- Problem Definition: describe the clipping before proposing landscape.
- Requirement Review: expose “make export landscape” as a proposed solution.
- Meeting Note: preserve facts, open questions and owners.
- Decision Record: explain why one layout was chosen.
- Question Bank: ask why the web preview had to remain portrait.

Every example that follows uses this case. Each completed example is followed by a blank worksheet.

Decision Record

COMPLETED EXAMPLE

Decision to make	Should the web preview and downloaded file use the same landscape layout?
Why now	Users have to switch every downloaded file to landscape before they can use it.
Hard constraints	The complete table must remain readable; the team should not maintain two layout systems.
Options considered	Change the downloaded file only; shrink the table; keep the manual workaround; unify both layouts.
Decision	Use landscape in both places. Product owns the choice; delivery begins in this release.
Revisit when	Mobile preview becomes harder to use. A document truly needs portrait layout.

The blank worksheet follows on the next page.

Decision Record

Do not only record what was chosen. Keep enough context for the decision to make sense later.

01	Question	What exactly needs to be decided?
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02	Context	Why does this need a decision now?
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03	Hard constraints	Which conditions cannot be ignored?
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04	Options considered	At least two, including why they were not chosen.
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05	Decision	What was chosen? Who owns it? When does it start?
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06	Revisit when	What change would make this decision no longer fit?
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Requirement Review

COMPLETED EXAMPLE

Is this a requirement or a solution?	A solution. The underlying need is to read the full table without reformatting the file.
Who uses it?	Business users who download the wide table and continue editing it in Word.
Who pays today?	Users reformat each file manually; Support keeps explaining the workaround; two layouts would add maintenance.
Existing flow affected	Web preview, Word export, print and mobile preview.
Understanding cost	Changing only the downloaded file would make the preview and export less consistent.
Other approach?	Shrinking or splitting the table would reduce readability.
Who validates?	Product confirms the scenario; QA checks the preview, downloaded file, print output and regression risks.
Who maintains it?	The document module keeps one shared layout rule.

The blank worksheet follows on the next page.

Requirement Review

Spend ten minutes on this before a requirement enters planning or development.

☐ Is this a requirement, or a solution chosen on someone else's behalf?

☐ Who will use it, and in what situation?

☐ Who benefits, and who pays in time, risk, or maintenance?

☐ Does it change an existing flow, role, or data set?

☐ Does it make the system harder to understand or explain?

☐ Could the problem be solved without development?

☐ Who accepts it, and what does done mean?

☐ Who maintains it after release?

If one answer is unclear, improve the question before adding more features.

Meeting Note

COMPLETED EXAMPLE

Confirmed facts	The portrait file cuts off columns; users switch it to landscape manually; the web preview already shows the whole table.
Open questions	Does any document type have to remain portrait? Is landscape usable on mobile?
Decision	Use landscape for this wide-table document in both the preview and the downloaded file.
Still not agreed	Whether other document types should change; they remain outside this release.
Next moves	Business analysis confirms scenarios; Development checks the configuration; QA prepares the tests.
Who else needs to know	Support and the release communications owner need to know how the user experience will change.

The blank worksheet follows on the next page.

Meeting Note

Do not capture every sentence. Keep only what can move the work after the meeting.

Facts

What verifiable information was confirmed?

Questions

What still has no answer?

Decisions

What was actually agreed?

Still different

Where do people still understand things differently?

Next moves

Who will do what, and by when?

Tell others

Who else needs to know?

Problem Definition

COMPLETED EXAMPLE

What happened?	In the downloaded Word file, portrait layout cuts off the table's right-hand columns.
Who is affected?	People who download the document and continue working in Word.
Why now?	The issue has surfaced again while the document module is already being updated.
If nothing changes	Users must manually reformat every downloaded file. Support must keep explaining the workaround.
Out of scope	Rebuilding the table component, changing every document type, or adding another export format.
One clear sentence	When someone downloads this wide table, portrait layout cuts off columns and forces them to switch the page to landscape before they can continue.

The blank worksheet follows on the next page.

Problem Definition

When solutions arrive too early, use this page to step back.

01 **What happened**

Describe the event, not the cause.

02 **Who calls it a problem**

Who is affected? Who raised it? They may differ.

03 **Why now**

What has just changed?

04 **If nothing changes**

What happens, and how soon?

05 **Out of scope**

What are we deliberately not solving?

06 **One clear sentence**

When____, ____ cannot____, leading to____.

Question Bank

COMPLETED EXAMPLE

See what happened	What changes between the web preview and the downloaded file?
Compare	Which columns disappear, and under which page settings?
Find the cost	Who has to switch the page to landscape every time?
See the wider cost	Who keeps explaining or maintaining the workaround?
Test shared language	Does “readable” mean visible, or ready to use without reformatting?
Test the assumption	Who decided the web preview must remain portrait?
Choose last	Do we truly need two layouts?
Revisit	What future condition would make landscape the wrong choice?

The blank worksheet follows on the next page.

Question Bank

When work stalls, do not add a task immediately. Change the question first.

See the facts

What actually happened?

Compared with what did it change?

Who noticed first?

See the cost

Who benefits?

Who pays the cost?

What happens if nothing changes?

See understanding

Who could misunderstand this?

Which assumptions remain unspoken?

Which word could mean two things?

See the choice

What are we actually deciding?

Which option has not been discussed?

What would make us change our mind?

Thinking Card Examples

Focus / topic

Frame the issue

Question

What must become clear first?

Note or next move

Write the facts before choosing a next step.

Focus / topic

See the links

Question

If this step disappears, what changes downstream?

Note or next move

Mark the people and flows affected.

Focus / topic

Test the belief

Question

What makes the current explanation credible?

Note or next move

Look for evidence that could disprove it.

Focus / topic

Hold the scope

Question

What must change now, and what can wait?

Note or next move

Write down what is out of scope.

Focus / topic

See the cost

Question

Who keeps doing extra work if nothing changes?

Note or next move

Name where the cost lands.

Focus / topic

Move forward

Question

What small step would reduce uncertainty fastest?

Note or next move

Run one focused check.

Thinking Cards

Focus / topic

Question

Note or next move

Focus / topic

Question

Note or next move

Focus / topic

Question

Note or next move

Focus / topic

Question

Note or next move

Focus / topic

Question

Note or next move

Focus / topic

Question

Note or next move

Anti-pattern Card Examples

Phrase you heard

"Users will not care."

Why is it risky?

The team is speaking for users without evidence.

A better response

Check with one real user.

Phrase you heard

"Just add a field."

Why is it risky?

A field changes data, flow and ownership.

A better response

Ask who will maintain it.

Phrase you heard

"That is not our area."

Why is it risky?

The problem may sit between team boundaries.

A better response

Find who owns the whole flow.

Phrase you heard

"We have always done it this way."

Why is it risky?

An old choice may no longer fit.

A better response

Ask why it was made.

Phrase you heard

"We will see after launch."

Why is it risky?

Without a measure, the result stays invisible.

A better response

Set a check and a date first.

Phrase you heard

"We covered it in the meeting."

Why is it risky?

A conversation is not a shared record.

A better response

Write the decision and open points.

Anti-pattern Cards

Phrase you heard

Why is it risky?

A better response

Phrase you heard

Why is it risky?

A better response

Phrase you heard

Why is it risky?

A better response

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Why is it risky?

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Why is it risky?

A better response

Phrase you heard

Why is it risky?

A better response