



IMPERIUM

A GUIDE TO BUSINESS ADMINISTRATION

SPECIAL THANKS TO

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GETTING STARTED

OVERVIEW

Welcome to Imperium, a training and consulting system designed for small- to medium-sized business operators and management teams. The goal of this system is to help you transform and evolve your business by providing a practical and foundational approach to the six pillars of business: leadership, finance, operations, sales, marketing, and personnel.

Imperium is designed to create a core operating system with practical applications and ideas on how each of the six pillars should be built, cared for, and monitored.

By establishing clear systems, Imperium will help you create clarity of mission, connect daily actions to the overall purpose, and provide easily-reportable processes. This training will

empower you to improve your business in at least one area or pillar, whether you are looking to transform, evolve, or strengthen your business.

While this system briefly touches on effective leadership and culture, it is important to note that other trainings and education, such as positive leadership, will greatly enhance the lessons learned in Imperium. Imperium is designed to be practical and implemented in any organization from top to bottom.

We are excited to help you embark on this journey to transform and evolve your business with Imperium. Let's get started!

INTRODUCTION

Name

Who are you? _____

Experience

on the team _____

Personal Wins

Over the last 14 days _____

Professional Wins

Over the last 14 days _____

Responsibilities

What do you do? _____

Challenges

in the business _____

Expectations

of this guide _____

GETTING A BASELINE

OF YOUR VIEW OF SELF AND THE ORGANIZATION

It is essential for individuals and organizations to have a clear and honest understanding of themselves to achieve success. Self-deception and denial can only lead to failure and stagnation. As the saying goes, “the truth shall set you free.” To be truly free, it is necessary to see the truth, which requires self-reflection and being open to honest feedback.

One step towards this truth is the Arbinger Institute’s assessment of your view of yourself and of the organization. This assessment can help you gain clarity and a true understanding of your current state of being. It can identify any areas where you may be self-deceiving or in denial, and provide insights into how you can improve yourself and your organization.

The Arbinger Institute’s assessment is a powerful tool for individuals and organizations looking to improve their performance and achieve their goals. It can help you identify any limiting beliefs and attitudes or behaviors that may be holding you back, as well as help you develop a plan to move forward.

In this section, we will explore the importance of having a true view of yourself and your organization. We will delve into the Arbinger Institute’s assessment and how it can help you gain insights into yourself and your organization. By being open and honest, and embracing the truth, you can take the first step towards achieving your goals and realizing your potential.

Take the assessment here:



[https://arbinger.com/
MindsetWeb.html](https://arbinger.com/MindsetWeb.html)

What did this short exercise show you? What did you learn?

SECTION 1

PILLARS

Just as pillars provide essential support and stability to a building, the six pillars of business are the foundation for a successful organization. They are critical to the success of any business, regardless of size or industry.

The leadership pillar is like the foundation of a building, providing the support and stability for the rest of the organization to build upon.

The finance pillar is like the structural pillar, providing the financial stability to keep the business running.

The sales pillar is like the decorative pillars that add beauty and elegance, attracting customers.

The marketing pillar is related to the sales pillar in that it acts as a decorative pillar that promotes the business to potential customers.

The operations pillar is like the load-bearing pillars that hold up the floors and walls of a building, ensuring that the business can operate efficiently and effectively.

Finally, the personnel pillar is like the maintenance pillars that ensure the building and its components are taken care of and functioning properly.

Without any one of these six pillars, the organization would be unstable and unable to function effectively. Just as a building requires all of its pillars to be strong and sturdy, an organization must also ensure that each of its six pillars is solid and well-maintained to achieve long-term success.

6 PILLARS OF BUSINESS

LEADERSHIP PILLAR

In the architecture of successful business, the leadership pillar stands as the keystone. Leadership isn't merely about charting a course; it's about visualizing tomorrow, setting clear objectives, and rallying a diverse group to march unitedly towards those goals. Leadership goes beyond the realm of mere decisions. It's about lighting the path, stirring passion, and cultivating a space where every individual feels not just a part of the process, but pivotal to its success. Imagine leadership as the captain of a vessel, providing direction, navigating storms, and ensuring the journey not only continues but reaches its desired destination.

The essence of leadership in business is profound and far-reaching. Consider a scenario where a business boasts an exceptional product, a potent marketing playbook, and an enthusiastic sales force. Yet, without the anchor of decisive leadership, these strengths might falter or scatter. Leadership molds the ethos, frames the decisions, and determines the organization's resilience in the face of adversity. It's the crucible of innovation, the proponent of venturing into the unknown, and the adaptive force during market shifts. Leadership is the thread that interlaces all other business facets, ensuring a cohesive, directed, and harmonious effort.

The practice of leadership permeates every layer of an organization. While the luminaries—CEOs, chairpersons, and other high-ranking officials—set overarching goals and ethos, leadership's pulse beats beyond the boardroom. From middle management to operational heads, leadership is about transforming macro visions into micro actions. It's the operations head refining processes to echo the company's commitment to sustainability or the sales lead innovating strategies in response to customer feedback. Essentially, wherever decisions shape paths, influence outcomes, or guide teams, the spirit of leadership thrives.

KPIs that may help measure the health of this pillar:

- ▲ **Employee Engagement Score:** A measure of employee sentiment, motivation, and alignment with the company's vision and goals.
- ▲ **Strategic Goal Achievement Rate:** The percentage of set strategic objectives achieved within a given timeframe.
- ▲ **Leadership Training and Development Hours:** The number of hours spent on training and development for leaders at all levels.

FINANCE PILLAR

The finance pillar serves as the pulse, measuring the vigor and resilience of an enterprise. Deeply rooted in the stewardship of an organization's monetary assets, finance ensures judicious allocation of resources, adept risk navigation, and the equilibrium of solvency and profitability. It's an intricate dance that spans budgetary craftsmanship, foresight in forecasting, nuanced investment appraisal, and strategic capital orchestration. Think of finance as the vigilant guardian, continuously gauging the organization's financial well-being, balancing revenue avenues with cost efficiencies, and seeking harmony between income and expenditure.

In the tapestry of business, the finance pillar holds a commanding position. The cornerstone of any venture—be it a fledgling startup or a global conglomerate—is the simple, yet profound, axiom of revenue outpacing costs. Astute financial management ensures an organization's gears turn seamlessly, fueling operations, seeding growth, and enriching stakeholders. Absent this meticulous fiscal oversight, even the most groundbreaking of enterprises can falter in their financial stride. Beyond just numbers, finance aids in sculpting the strategic contour, guiding ventures into fruitful terrains, or signaling retreat during economic droughts.

Within the organizational hierarchy, the finance pillar finds embodiment in roles such as Chief Financial Officers (CFOs), finance maestros, ledger guardians, and market seers. A CFO, for instance, collaborates with executive counterparts, charting bold financial voyages, always mindful of the company's strengths and limits. The ledger guardian, or accountant, stands as the bastion of financial integrity, recording transactions with precision and ensuring regulatory compliance. Meanwhile, the market seer, or financial analyst, delves into the vast seas of data and trends, casting forecasts and spotlighting investment goldmines or potential pitfalls. From visionary endeavors to the granular nuances of daily financial operations, the finance pillar remains integral, steering and fortifying an enterprise's journey.

KPIs that may help measure the health of this pillar:

- ▲ **Net Profit Margin:** Calculated as Net Profit divided by Total Revenue. It measures how effectively a company can convert revenue into profit.
- ▲ **Current Ratio:** A liquidity metric that measures a company's ability to cover its short-term obligations with its short-term assets.
- ▲ **Return on Investment (ROI):** Measures the gain or loss generated on an investment relative to the amount of money invested.

OPERATIONS PILLAR

In the intricate tapestry of a business, the operations pillar stands as the very loom upon which success is woven. Operations, in its essence, represents the harmonious choreography of tasks, resources, and processes, ensuring that the gears of a company move smoothly, synchronously, and efficiently. It's not just about tasks completed; it's about the elegance and effectiveness with which they're executed. Like the silent maestro of an orchestra, operations ensure each section plays in time and tune, creating a symphony of productivity and quality.

The profundity of the operations pillar cannot be understated. It is the silent force that underpins every successful venture. A product, no matter its brilliance, or a strategy, regardless of its foresight, relies heavily on the precision and adeptness of operational execution. Beyond the mere mechanics, operations serve as a mirror, reflecting the efficiency, adaptability, and resilience of an enterprise.

Through streamlined processes, resource optimization, and keen attention to detail, operations act as the guardian of value, ensuring that the company's efforts translate into tangible outcomes and sustained growth.

Delving into the heart of an organization, the operations pillar comes to life through roles such as operations managers, process architects, quality control experts, and logistics coordinators. An operations manager, for instance, oversees the intricate dance of daily activities, ensuring fluidity and addressing bottlenecks. A process architect meticulously designs workflows, aiming for peak efficiency and scalability. On the other hand, a quality control expert vigilantly monitors product and service standards, upholding the brand's promise. Meanwhile, logistics coordinators, often unsung heroes, ensure timely and accurate delivery, keeping the promise made to clients and customers. In its entirety, the operations pillar stands as the bedrock, providing stability, efficiency, and momentum to a company's journey.

KPIs that may help measure the health of this pillar:

- ▲ **Operational Efficiency Ratio:** The ratio of operating expenses to operating revenue, indicating how well the business is managing its resources.
- ▲ **Inventory Turnover Rate:** Measures how many times inventory is sold and replaced over a certain period, indicating product demand and efficiency in managing stock.
- ▲ **Order Fulfillment Rate:** The percentage of orders that are processed and delivered on time, highlighting efficiency in the supply chain and logistics.

SALES PILLAR

The sales pillar emerges as the dynamic engine that converts a company's potential into palpable success, metamorphosing offerings into revenue streams. Sales, at its heart, is the art and science of discerning customer desires, fostering enduring bonds, and articulating the unique merits of a product or service to an awaiting audience. It's the nexus that introduces a company's innovations to the world, turning possibilities into realities. This vibrant dance of sales melds tactical acumen, deft relationship-building, and an intimate familiarity with both the offering at hand and the competitive arena it graces. The vitality of the sales pillar is quintessential for a company's ascent and endurance. An invention might hold revolutionary promise, or an operational blueprint might be a masterpiece, but devoid of sales, these remain mere potentials. Beyond the obvious revenue generation, sales serves as the company's ear to the ground, echoing the market's pulse back to the organization. Through the kaleidoscope of interactions and engagements, sales teams distill market sentiments, evolving preferences, and avenues for refinement. In this dual role, sales champions the company's narrative to its audience and simultaneously channels the voice of the market back to the company's corridors.

Within the enterprise's architecture, the sales pillar finds its heartbeat in roles such as market evangelists, client custodians, sales strategists, and growth architects. A market evangelist, commonly known as a sales representative, often stands at the vanguard, interfacing with prospects, elucidating their queries, and extolling the company's offerings. A client custodian or account manager meticulously cultivates lasting client relationships, ensuring sustained satisfaction and unearthing avenues for enhanced engagement. At the helm, a sales strategist, perhaps a director, crafts the sales voyage, setting ambitious milestones, curating strategies to traverse them, and sifting through data to sharpen the course. Each dialogue, overture, and accord sealed under the sales pillar enhances the company's narrative and fortifies its marketplace stature.

KPIs that may help measure the health of this pillar:

- ▲ **Sales Growth Rate:** The percentage increase in sales over a specific period, indicating the health and potential growth of revenue streams.
- ▲ **Customer Acquisition Cost (CAC):** The average expense of acquiring a new customer, factoring in all sales and marketing costs.
- ▲ **Lead Conversion Rate:** The percentage of leads that turn into paying customers, showcasing the effectiveness of the sales process.

MARKETING PILLAR

The marketing pillar emerges as the luminous beacon, illuminating a company's presence and resonating its narrative across the vast marketplace expanse. At its essence, marketing is about crafting a compelling story, weaving together the threads of a company's ethos, its offerings, and the needs of its intended audience. It's the grand stage upon which a brand's identity is showcased, drawing audiences into its embrace and fostering a sense of connection. This symphony of marketing melds creativity, strategic insight, and an attuned understanding of both societal currents and the ever-shifting competitive milieu.

The potency of the marketing pillar is indispensable in carving out a distinguished alcove for a business amidst a bustling market bazaar. A product might be a paragon of innovation, or a service might be unparalleled, but without the artful touch of marketing, they risk fading into obscurity. Beyond mere visibility, marketing offers a kaleidoscope through which the market perceives, evaluates, and engages with a brand. Through meticulously crafted campaigns, targeted messaging, and audience engagements, marketing provides a feedback loop, enriching the business with insights on perception, reception, and avenues for enhancement.

Within the organizational tapestry, the marketing pillar finds its vibrancy in roles such as brand custodians, content maestros, market researchers, and strategic campaign orchestrators. A brand custodian, often referred to as a brand manager, nurtures and polishes the company's image, ensuring consistency and resonance across all touchpoints. A content maestro, or content marketer, crafts compelling narratives that captivate and educate audiences. On the other flank, a market researcher delves into the depths of market dynamics, gleaning insights to inform strategy. Meanwhile, a campaign orchestrator, perhaps a marketing director, designs and deploys multi-faceted campaigns, ensuring maximum reach and impact. Each endeavor, initiative, and narrative spun under the marketing pillar amplifies the company's voice and crystallizes its position within the market mosaic.

KPIs that may help measure the health of this pillar:

- ▲ **Customer Lifetime Value (CLV):** An estimation of the total worth of a customer to a business over the entirety of their relationship.
- ▲ **Marketing ROI:** The return on marketing investments, showcasing the effectiveness of marketing campaigns and strategies.
- ▲ **Brand Awareness Level:** Measurement of how familiar the target audience is with the brand, often gauged through surveys, social mentions, or online engagements.

PERSONNEL PILLAR

In the grand tapestry of a business, the personnel pillar is the very soul that infuses life, passion, and purpose into the enterprise. Personnel, at its heart, embodies the collective spirit, talent, and aspirations of those who walk the halls and corridors of an organization. They are not just cogs in a machine; they are the essence and heartbeat that animate its very being. Like the roots of an ancient tree, personnel provide the nourishment, strength, and stability, ensuring that the organization grows tall and flourishes. The depth and significance of the personnel pillar is profound, shaping the very character and ethos of an enterprise. Beyond roles and responsibilities, it's about nurturing a culture of collaboration, innovation, and mutual respect. A product or strategy may bear the mark of genius, but it's the hands, minds, and spirits of the personnel that bring them to fruition. Their growth, well-being, and fulfillment directly correlate with the prosperity and resilience of the business. In nurturing them, we nurture the future of the enterprise, creating an environment where talents are honed, ideas bloom, and dreams are realized.

Within the vast expanse of an organization, the personnel pillar manifests through roles such as human resource managers, talent acquisition specialists, training coordinators, and employee engagement experts. An HR manager, for instance, tends to the well-being and growth of employees, ensuring a harmonious and productive environment. A talent acquisition specialist seeks out the brightest sparks, those who will add to the company's luster. Training coordinators focus on skill development, ensuring that the team is equipped for both present challenges and future horizons. Meanwhile, engagement experts weave the bonds of community, fostering a sense of belonging and shared purpose. At its core, the personnel pillar is the testament to the timeless truth: it's the people that make the place, and in their growth lies the growth of the enterprise.

KPIs that may help measure the health of this pillar:

- ▲ **Employee Turnover Rate:** The rate at which employees leave the organization, offering insights into employee satisfaction and organizational health.
- ▲ **Employee Productivity Rate:** Measures output per employee, indicating the effectiveness of training, tools, and morale in influencing work outcomes.
- ▲ **Training and Development Hours:** The average number of hours spent on training and development per employee, indicating the company's investment in skill enhancement and personnel growth.

STAGES OF BUSINESS

Startup/ Existence

- Less than one year in business
- Simple structure - usually only the owner/founder a few people
- Typically very finite time, money, and resources
- A founders business acumen is critical during this stage
- Relatively few customers/clients - B2B companies may rely heavily on a few clients

Survival/ Preservation

- Two quarters of profitability.
- Still loosely structured with informal processes.
- Resources remain limited.
- Growing customer base; you may still be reliant on a few clients.

Viability/ Success

- Beginning to have some cash on hand to weather storms.
- Structure is more organized and formal.
- An operating system of some sort is in place to organize processes.
- Organizational structure/chart is filled or being filled; key roles are hired and trained.
- No longer dependent on a few clients.
- Mostly independent from the owner/founder.

Scaling/ Take-Off

- Increasing resources.
- Using resources to increase market share; increase customer base.
- Management and leadership positions have the authority to make decisions.
- You now have mature processes and learning management systems.

Maturity/ Succession

- The objective becomes long-term success and longevity.
- Founders may be exiting.
- The danger of becoming, stale, rigid, or slow to respond; the innovator's dilemma.
 - Innovator's dilemma.



Things to remember:

Beyond the start-up phase and an initial founding idea/solution, having the right people in the right seats is paramount. **Good ideas come from people.**

6 PILLARS OF BUSINESS

1	Leadership/Value Creation:	“Are we creating something people will pay for?” Convenience or high fidelity
2	Finance:	“Do we make more than we spend?”
3	Sales:	“Do our customers believe and trust us?” (Guide: authority and empathy)
4	Marketing:	“How are we attracting and holding attention?”
5	Operations:	“Are we exceeding customer expectations?”
6	Personnel:	“Do we have the right people in the right seats?”



Things to remember:

Strength in all 6 pillars is necessary for growth and stability.
The right people in the right seats + ideas + resources = success.
Put these into your framework to achieve your desired outcomes.

PILLARS STRENGTH ASSESSMENT



Activity

Instructions: Rate each pillar from 1-10 for the given criteria.

Add up the total from each pillar. Which pillars are strong? Where can you focus attention to strengthen other pillars?

1. Leadership - Value

a. Core values are clearly defined.

1 2 3 4 5 6 7 8 9 10

b. Culture and vision are clear and defined.

1 2 3 4 5 6 7 8 9 10

c. Everyone on the team is brought into the direction of the company.

1 2 3 4 5 6 7 8 9 10

2. Finance

a. Financial data is clean and easy to find.

1 2 3 4 5 6 7 8 9 10

b. Can produce up-to-date financial reports at any time.

10 rating scale with 10 empty circles numbered 1 to 10.

c. Dashboard of key numbers that allows for transparency.

10 rating scale with 10 empty circles numbered 1 to 10.

3. Marketing

a. Systems in place to track marketing efforts and returns.

10 rating scale with 10 empty circles numbered 1 to 10.

b. Clearly-defined marketing plan; a clear story.

10 rating scale with 10 empty circles numbered 1 to 10.

c. Clearly-defined ideal customer profile: the hero

10 rating scale with 10 empty circles numbered 1 to 10.

4. Sales

a. Clearly-defined sales processes.

10 rating scale with 10 empty circles numbered 1 to 10.

b. A new sales team member can join our team and get up to speed quickly.

10 rating scale with 10 empty circles numbered 1 to 10.

c. Our sales process is focused on helping individuals achieve their goals.

10 rating scale with 10 empty circles numbered 1 to 10.

5. Operations

a. Processes are established and documented

10 rating scale with 10 empty circles numbered 1 to 10.

b. Processes can be reviewed and improved quickly.

10 rating scale with 10 empty circles numbered 1 to 10.

c. If something goes wrong, we can quickly identify the root cause and have a clearly-defined way of correcting it.

10 rating scale with 10 empty circles numbered 1 to 10.

6. Personnel

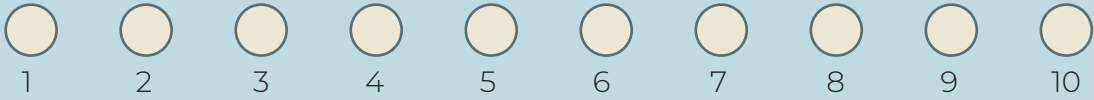
a. Clearly defined roles and responsibilities. The organizational chart is documented and clear.

10 rating scale with 10 empty circles numbered 1 to 10.

b. Everyone knows how to best communicate with anyone else on the team.

10 rating scale with 10 empty circles numbered 1 to 10.

- c. We have the right people in the right seats. We have the right leaders to protect the culture and hire the right people.



Leadership total score: _____/30

Finance total score: _____/30

Marketing total score: _____/30

Sales total score: _____/30

Operations total score: _____/30

Personnel total score: _____/30



Activity

What did you learn from this pillar exercise?
What actions will you take?

SECTION 2

PATHWAY TO GROWTH

- ✓ Get the right people.
- ✓ Put them in the right seats.
- ✓ Create and follow a North Star.
- ✓ Create value (PG XXXX).
- ✓ Fail, correct, refine, repeat (PG XXXX).
- ✓ Innovate – don't fall into the “customer is always right” trap.
- ✓ Stay centered on your “Why” (not “How” or “What”)

RIGHT PEOPLE - RIGHT SEATS

Activity



Draw a simple organizational chart of your organization or department.

Write in the titles AND names of the individuals in each role.

Next to each name, give a grade of A (excellent), B (good), or C (needs improvement).

Now, consider each person you've graded as a B or C. Are those the right people? Are they in the right seats? Would they perform better in a different role?

For each B and C employee, ask yourself these questions:

Are these the right people?

Are they the right fit for the company?

Is the company a fit for them?

Before you make any rash judgments, also ask these questions!

Are they in the right seats?

Might they perform better in a different role?

Do you trust them to perform? (How would you treat them differently if you DID trust them)?

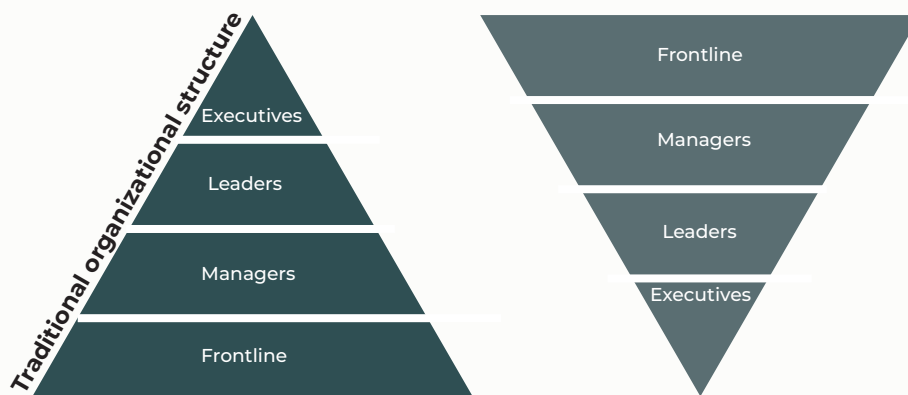
What do they look like when they are at their best? How can you create this more often?

In the next section, we will further discuss organizational structure and people.

Notes: _____

ORGANIZATIONAL HEALTH

- ▲ For organizational chart philosophy, an inverted pyramid is recommended for long-lasting relationships and healthy culture - if only for leaders to conceptualize.



A traditional organizational structure is top-down. In the inverted structure, frontline employees are at the top and supported by their managers. Managers are supported by their leaders, and so on. The “higher” the position, the more stewardship, care, and support are required. In an inverted structure, leaders’ primary function is to support everyone within their purview.

- ▲ **Regularly review your employees**

- This should happen in 1:1 and regular, formal reviews.
- Employees should be regularly scored overall based on two key metrics: performance and goodness of fit.
 - A employees should be leaders.
 - B employees should be trained to be leaders.
 - C employees should be shown the door.
 - *But only after you have gone through the exercises on pg xxxxx.*
 - *Is their underperformance a reflection of leadership and the organization?*
 - *Have you given them a fair chance by treating them like an a employee?*

- Proper training should be implemented - look inward first.
 - Training needs to be documented, and resources should be readily available to everyone at any time.
 - There should be clear metrics to determine whether or not employees are performing and improving. These metrics should be tracked and reported regularly.
- Make sure employees are in the right seat.



Things to remember:

Good organizations have:

Leaders who set the tone for the entire organization.

Managers who are brought in and are high-performing employees.

Followers who look to the leaders and managers and follow their lead.

Great organizations can turn followers into managers and managers into leaders.



Activity

What training do you offer for new hires? Ongoing? How can you improve this?

NOTES

PERSONNEL

▲ Your culture starts with leadership

- Reinforced by hiring
 - What is your North Star? What are your values? Safe guard this in the hiring process (PG XXXXX)

 - What things CAN'T be taught on the job?

 - What is your hiring process? Does it protect your culture? Is it defined?

▲ Have a coaching and corrective process clearly outlined for leaders and managers

- What infractions or actions should start a corrective action?

- What does a corrective action process look like?

- Do ALL employees understand what it means and the criteria?

▲ From whom do your products/services come?

- Do you create a time/space for them to innovate and improve?

- Good ideas come from *people* – they don't exist on their own!

▲ **Have a clear and transparent review process that can happen regularly**

▲ **For small businesses - owner operators:**

- Do you hire people to do the things you can do or the things you can't do?

- If you hire people to do the things you CAN'T do, you'll be stuck doing the things you CAN.
- If you hire people to do the things you CAN do, it will free you to work on other things.



Some questions to consider:

- What types of actions would initiate the process?
- Who would be involved?
- What is the goal of the process?

Use the space provided to outline a corrective action process. If you have one in place, can you easily describe it here?



Things to remember:

The plan should be easy to explain, implement, track, and report.

MEETINGS

▲ Three meeting types

- Working on.
- Working in.
- Working with.

▲ Strategy meetings (working on) management and administration.

▲ Operation meetings (working in) daily department meetings (stand-ups) and other tactical meetings.

▲ Culture meetings (working with) weekly team meetings, etc.

WHEN, WHERE, WHO, WHAT

BRICK Meeting Daily 10 minute meeting with everyone on the team.

Align Meeting

Weekly 60 minute meeting with the Leader (CEO) and the Manager (COO).

WIN Meeting

Weekly 60 minute meeting with Manager (COO) and business unit leaders.

Foundational Fridays

Weekly 60 minute meeting Manager (COO) and those involved in the review process.

Team Rally

Monthly 60 minute meeting with everyone on the team.

Quarterly Review

Meeting with the Leader (CEO), Manager (COO) and the business unit leaders.

Annual Planning

Annual meeting with the Leader (CEO), Manager (COO), and business unit leaders.

EXAMPLE MEETING AGENDAS

BRICK Meeting	Check-In	2 min.
	Public Praise	5 min.
	BBA Metrics	3 min.

Align Meeting	Check-In	5 min.
	CTQ Issue Resolution	55 min.

WIN Meeting	Check-In	5 min.
	Voice of the Customer/ Employee	5 min.
	Quarterly Commitment Review	5 min.
	To-Do List	5 min.
	Stoplight Review	5 min.
	CTQ Issue Resolution	30 min.
	Conclude	5 min.

Foundational Fridays	Problem Statement	5 min.
	Goal Statement	5 min.
	Process Map "As-Is"	20 min.
	Process Map "Should-Be"	20 min.
	Implement Plan	5 min.
	Conclude	5 min.

Use the space on the next page to brainstorm and schedule these meetings now.



Things to Remember:

If it can be an email, it shouldn't be a meeting
All meetings should have an agenda that's shared beforehand.

Activity: Plan and Schedule Meetings



- Who needs to attend?
- When will it be held?
- Where will be held?
- Can it be an email?

SECTION 3

SIPOC



Activity

Use the space provided to identify your suppliers, inputs, process, outputs, and customers. Use the listed KPIs to help guide you and to help you identify the related step.



Suppliers

Who supplies materials? Or where do prospects come from if you are a service provider with no goods?

KPIs (price per unit, lead times, - leads, lead by source)



Inputs

What inputs are needed for you to make a sale? For example, packaging and fuel for cars for a dealership. Labels, finish goods, etc... What is your sales process for your service-based business?

KPIs (inventory on hand, cost of ancillary items - sales process KPIs for service)



*Process

This is the stage when a prospect becomes a customer. What steps exist for your business?

KPIs (pitched deals, deal close rates, e-commerce conversion rate, units sold)



Outputs

What is created after a new customer signs up? Are there payments, paperwork, new client profiles, new work orders, etc?

KPIs (Orders, new clients, etc)



Customers

How do you retain, interact with, and reclaim clients/customers? KPIs

KPIs (Returning customer rate, referrals, reviews, etc)

For more KPI ideas, see pages XXXXX

***BETWEEN INPUTS AND PROCESS:**

What can you measure between inputs and process that is a key indicator?

THIS is what your team should focus on. More of these, means more business. Every Weekly Important Number (WIN) should support this or be able to be connected to this.

How can customers experience you BEFORE buying? The more bra sizings Victoria's Secret reps perform, the more they sell. The more feet Footlocker reps measure, the more shoes are sold.

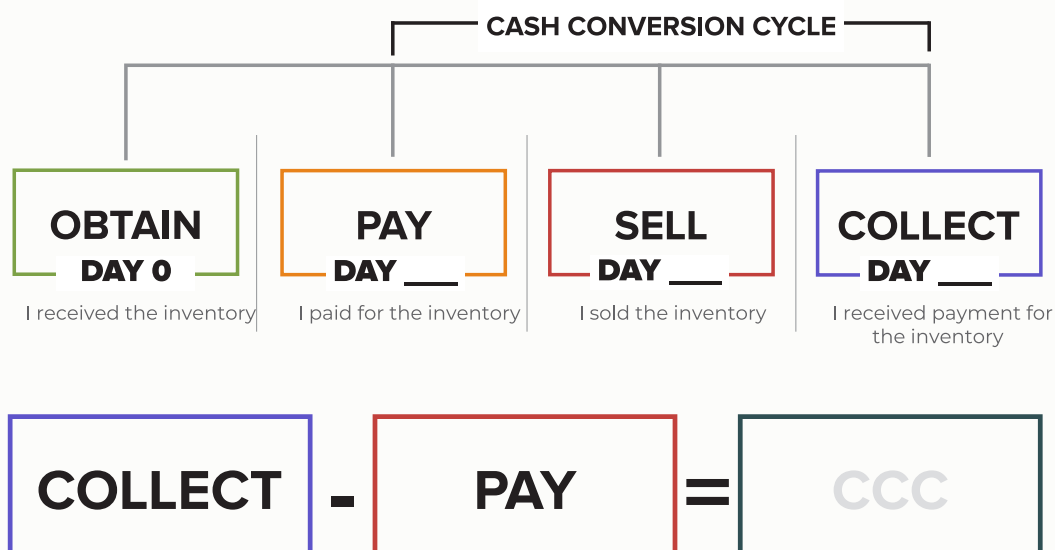
Identifying this is critical. This becomes your BRICKS that build your company - one by one.

CASH CONVERSION CYCLE

It is vital that your business knows its cash conversion cycle. By understanding how long it takes to turn inventory into money, we then have the confidence to make investments or reduce expenses.

The cash conversion cycle measures the time from when your company pays cash for its inventory until it receives cash for its inventory. The longer the cash conversion cycle, the more cash you will need to finance yourself.

What is the average number of days it takes to sell your inventory?	
What is the average number of days before you collect payment after a sale	
How soon do you have to pay for your inventory once it is obtained? If you are service-based put 0	



MUST KNOW KPIs

There are an almost infinite number of Key Performance Indicators (KPIs) you can track. What is important to your business depends on many factors, including what stage your business is in, what industry you are in, and what overall business objectives you have. Below are a few KPIs that should apply to nearly every business.

- 1. Profitability:** You cannot operate and scale a profitable business without knowing these metrics. Not knowing these metrics will also cause slow bleeds in established companies. Additionally, marketing campaigns will struggle to be productive without understanding these metrics. For example, if you do not know contribution and profit margin numbers, how can you accurately assess a marketing campaign's Cost Per Acquisition?
 - a. Contribution margin: $\text{Sale price} - \text{variable costs (Cost of Goods Sold, including ad spend)}$
 - i. Net revenue - all variable costs (including ad spend)
 - b. Profit margin: $\text{Revenue} - \text{All Costs} / \text{Revenue} \times 100$
 - i. Unit profit margin: $\text{Sale Price} - \text{All associated costs (including share of fixed costs)} / \text{sale price} \times 100$
 - c. Average Order Value (AOV): $\text{Total Sales Revenue} / \text{Number of Sales}$
 - d. Purchase Frequency (PF): $\text{Purchases in given period} / \text{Number of unique customers in given period}$
 - e. Customer Value (CV): $\text{PF} \times \text{AOV}$
 - f. Average Customer Lifespan (ACL): Average length of time a customer continues buyig from you.
 - g. Lifetime Value of Customer: $\text{CV} \times \text{ACL}$
- 2. Additional Metrics and KPIs**
 - a. Media Efficiency Ratio (MER): $\text{Revenue} / \text{Ad Buy Cost}$
 - b. New Customer Media Efficiency (aMER): $\text{Revenue from new customers} / \text{Ad Buy Cost}$
 - c. New customer cost per acquisition: $\text{Marketing budget} / \text{Number of new customers}$
 - d. Repeat Customer Rate: $\text{Revenue from returning customers} / \text{Total Revenue}$
 - e. Platform specific metrics
 - i. Return On Investment/Return On Ad Spend: $\text{Platform attributed revenue} / \text{Platform specific Ad Spend}$
 - ii. Revenue attributed to: Revenue from specific channel or platform

STOPLIGHT

Stoplights are almost universally recognized.

Green means go; yellow means yield; red means stop.

A stoplight report is a color-coded report of important KPIs you can use to easily identify where your time should be spent and what parts of the organization need more support.

Green = ON TARGET OR ABOVE

Yellow = WITHIN RANGE (or WARNING)

Red = BELOW TARGET

If you start to see several weeks in a row of yellow or red in a specific pillar or on a specific KPI, it means this is where you need to focus and support.

For Stoplight to be effective, it must be:

1. Filled out before the meeting.
2. Color-coded for easy reading.
3. Broken down by quarter—quarterly commitments. It should be long enough to make a change and short enough to pivot quickly.

All Metrics on Stoplight report must:

1. Have a responsible person (who is responsible for the performance of the metric?)
2. Follow SMART goal setting principles
 - a. Specific
 - b. Measurable
 - c. Achievable (but if you are hitting them all the time, time to stretch!)
 - d. Relevant (these MUST be actually important to the overall health of the business)
 - e. Time-bound/Timely



Things to remember:

When progress is measured, performance improves. Pearson's Law states that when performance is measured and reported, the rate of improvement accelerates.

Department	Measurable	Target	1	2	3	4	5	6	7	8	9	10	11	12	13
Leadership	BRICKS	100	110	95	104	75	80	125	103	99	84	108	130	111	82
	CCC	30 Days	32	28	31	31	27	30	30	30	30	29	30	31	31
	Gross Profit	\$50,000	47k	50k	58k	40k	42k	63k	50k	48k	43k	54k	65k	55k	45k
Finance	Cash on Hand	\$250,000	250	250	250	250	250	250	250	250	250	250	250	250	250
	Cost Per Conversion	\$100	92	103	100	110	115	9+9	84	100	103	94	96	93	110
Marketing	Cost Per Lead	\$10	7	11	12	8	10	12	14	8	9	10	8	12	13
	Widgets Per Day	20	20	21	18	23	20	20	18	24	19	22	20	17	25
Operations	Error Rate	0	0	1	0	0	0	2	0	0	1	0	0	2	1
	Training Hours	10	12	8	10	10	12	9	8	7	12	10	10	11	9
Personnel	Attrition	0	0	0	0	1	1	0	0	0	0	1	0	0	0

Department		Measurable	Target	1	2	3	4	5	6	7	8	9	10	11	12	13
Leadership																
Finance																
Sales																
Marketing																
Operations																
Personnel																

KPI IDEAS

LEADERSHIP

- ▲ Bricks (see page XXX)
- ▲ One to ones with leaders and/or managers
- ▲ Cash conversion cycle
- ▲ Names learned
- ▲ Pick from other pillar KPIs

FINANCE

- ▲ Cash on Hand
- ▲ Revenue
- ▲ Expenses
- ▲ Average Profit Per Deal
- ▲ Cost Per Lead
- ▲ Cost Per Contract
- ▲ Processes Documented
- ▲ Outstanding Debt

SALES

- ▲ Appointments set
- ▲ Sales calls
- ▲ Sales meetings
- ▲ Proposals
- ▲ Closed business
- ▲ Close ratio
- ▲ Expected revenue
- ▲ Actual revenue
- ▲ New leads

MARKETING

- ▲ New leads
- ▲ Page views
- ▲ Clicks
- ▲ Click through rate
- ▲ Online conversion rates
- ▲ Cost per acquisition (cost per lead)
- ▲ Cost per new sale

OPERATIONS

- ▲ Errors
- ▲ Customer Problems
- ▲ Waste
- ▲ Customer Rating
- ▲ Warranty Claims
- ▲ Overtime
- ▲ Unbillable Hours
- ▲ Cost Per Unit
- ▲ Average Hourly Rate
- ▲ Delivery/Shipping
- ▲ Utilization Rate

PERSONNEL

- ▲ Employee Satisfaction
- ▲ Late Employees
- ▲ Appointments Missed
- ▲ Sick Days
- ▲ Open Positions
- ▲ Payroll
- ▲ SLA's
- ▲ Unemployment Claims
- ▲ Team Development
- ▲ Training
- ▲ Management Metrics

PROCESS MANAGEMENT

Standardized and repeatable processes play a crucial role in the growth and success of a business. By establishing clear and consistent procedures, organizations can streamline their operations, enhance productivity, and ensure quality outcomes. Standardization enables employees to understand their roles and responsibilities, promoting efficiency and reducing errors. Repeatable processes allow for consistent results, which not only instill confidence in customers but also pave the way for continuous improvement and scalability.

Moreover, standardized processes facilitate knowledge sharing, smooth transitions between team members, and enable businesses to adapt more easily to changes in personnel. Overall, implementing standardized and repeatable processes establishes a solid foundation for sustainable growth, fosters innovation, and enhances the overall effectiveness of a business.

As you begin to assess your processes, you should start with the end in mind. What is the result you want to achieve from each process? What is the result you want to achieve at the end or culmination of all the processes? What is your ultimate goal?

SIX SIGMA

Six Sigma is a disciplined and data-driven approach to process improvement that aims to eliminate “defects” (ie errors) and improve overall performance in organizations. Below are a few elements of Six Sigma:

1. Defects Per Million Opportunities (DPMO)
2. 3.4 defects per million
3. Very analytical (Six Sigma is named after a statistical concept)
4. Reduce variability to produce expected results
5. Highly focused on output/quality

Six Sigma is a widely used approach to process management. However, one of the pitfalls with the theory is that if you focus exclusively on the end result (ie quality of product or service), you may significantly hamper efficiency.

LEAN MANUFACTURING

Lean Manufacturing is a systematic approach to processes that focus on maximizing value while minimizing waste. Lean emphasizes the elimination of waste - tasks or activities that do not directly support the end product. Below are few elements of Lean:

1. Emphasis is on the process
 2. Reduce waste (8 wastes)
 - a. Transportation
 - b. Inventory
 - c. Motion
 - d. Waiting
 - e. Overproduction
 - f. Overprocessing
 - g. Defects
 - h. Unused talent
 3. Three Ss of Lean (see more on page XXXX):
 - a. Sweep
 - b. Sort
 - c. Standardize
 4. Question to ask: does this directly contribute to the objective (quality)?
 5. 2 Second lean - anything that saves 2 seconds many times can add up really quickly. No improvement is too small!
-

LEAN SIX SIGMA

Lean Six Sigma is an integrated approach that combines the principles and tools of Lean Manufacturing and Six Sigma methodology. Lean Six Sigma aims to achieve operational excellence and continuous improvement by addressing both process efficiency (Lean) and process effectiveness (Six Sigma).

Lean focuses on eliminating waste and optimizing process flow, while Six Sigma focuses on reducing variation and defects in processes. By integrating these two methodologies, organizations can achieve synergistic benefits and a comprehensive approach to process improvement.

Lean Six Sigma utilizes the DMAIC (Define, Measure, Analyze, Improve, and Control) framework to identify and solve problems, reduce waste, and improve process performance. It combines Lean techniques such as value stream mapping, 5S, and just-in-time production with Six Sigma's statistical analysis tools, process capability analysis, and root cause analysis.

The integration of Lean and Six Sigma allows organizations to streamline processes, reduce errors, improve quality, increase efficiency, and enhance customer satisfaction. Lean Six Sigma has been widely adopted in various industries and has proven to be a powerful methodology for driving continuous improvement and achieving business excellence.

Six Sigma = Quality - Lean = Efficiency - Lean Six Sigma = Quality done through efficient processes. THE OBJECTIVE IS QUALITY (Six Sigma) BUT DONE EFFICIENTLY (LEAN)

The DMAIC framework is a problem-solving methodology commonly used in process improvement projects, particularly in the context of Six Sigma. DMAIC stands for Define, Measure, Analyze, Improve, and Control, which represent the five key stages of the framework:

DEFINE	In this stage, the project goals and objectives are clearly defined, along with the problem statement and scope. The project team identifies the customer requirements and defines the key metrics that will be used to measure the process performance. The define phase also includes Design, breaking the process into multiple tasks. At this stage, you will also Model the process by creating a visual representation of the process.
MEASURE	The Measure stage involves collecting data to assess the current state of the process. This includes identifying the relevant process inputs and outputs, establishing a data collection plan, and measuring the baseline performance using appropriate statistical techniques.
ANALYZE	In the Analyze stage, the collected data is analyzed to identify the root causes of process issues and variations. Various statistical tools and techniques, such as Pareto charts, cause-and-effect diagrams, and hypothesis testing, are employed to gain insights into the factors influencing process performance.
IMPROVE	Based on the findings from the analysis stage, the Improve stage focuses on developing and implementing solutions to address the identified root causes. Improvement ideas are generated, evaluated, and prioritized. The selected solutions are then tested and implemented, and their effectiveness is measured.
CONTROL	The Control stage involves establishing controls and monitoring mechanisms to sustain the improvements achieved in the previous stages. Process controls, standard operating procedures, and performance metrics are defined to ensure that the gains are maintained over time. Additionally, plans for ongoing monitoring and periodic review are put in place.

The DMAIC framework provides a structured and systematic approach to problem-solving and process improvement. It guides project teams through the phases of understanding the problem, analyzing data, implementing improvements, and ensuring sustainability through control measures.

Things to Remember:

1. Processes must be monitored by management BUT driven by everyone



- a. Trust them to make changes
- b. Trust them to fail and adapt
- c. If you don't trust them, why are they there?
 - i. A, B, C employees
- d. Automate what can be automated
- e. *Do not be afraid to fail.* If you follow DMAIC processes, you should be able to tell if a change improved or worsened the process. *Learn from the change EITHER WAY and move forward!*

NOTES

PRACTICE PROCESS MANAGEMENT



Activity

Select a process within your organization or department. Use the DMAIC method to begin to break it down and analyze it. Use the space provided on page (XXX next page) to map and visualize the process.

DEFINE

MEASURE

ANALYZE

IMPROVE

CONTROL



Activity

Process Map. Use this space to draw a process. Things you should consider include: actions, delays, approvals, decision branches.

SECTION 4

CORE VALUES

1. Name **THREE** people over the age of 18 that have made a positive impact on your life. You have to know them, and they have to know you.

NAME: _____ ROLE: _____

NAME: _____ ROLE: _____

NAME: _____ ROLE: _____

2. List 5-7 attributes that you most admire about these people.

NAME _____

1 _____

2 _____

3 _____

4 _____

5 _____

6 _____

7 _____

NAME _____

1 _____

2 _____

3 _____

4 _____

5 _____

6 _____

7 _____

NAME _____

1 _____

2 _____

3 _____

4 _____

5 _____

6 _____

7 _____

3. List 3-7 core values that apply to all three of these people

1 _____

2 _____

3 _____

4 _____

5 _____

6 _____

7 _____

MY CORE VALUES ARE:

I would be willing to **FIRE** someone if they violated these core values.

CORE VALUE EXAMPLES

- Accountability
- Adventurous
- Adaptability
- Aggressive
- Attention to detail
- Authenticity
- Capability
- Collaborative
- Commitment
- Compassion
- Competitive
- Consistency
- Courage
- Craftsmanship
- Dependability
- Dominance
- Customer-focused
- Efficiency
- Enthusiasm
- Ethical
- Excellence
- Expertise
- Fairness
- Fearlessness
- Flexibility
- Friendliness
- High performance
- Honor
- Improvement
- Innovation
- Integrity
- Kindness
- Market leader
- Open-mindedness
- Optimism
- Ownership
- Passion
- Perseverance
- Pragmatism
- Positivity
- Reliability
- Respect
- Responsive
- Quality
- Service
- Transparency

GOLDEN CIRCLE

The Golden Circle is a concept developed by Simon Sinek that emphasizes the importance of starting with the “why” before moving to the “how” and “what.” It consists of three concentric circles: why, how, and what.

Why: The innermost circle represents the “why” of an organization or individual. It’s the purpose, cause, or belief that inspires and drives actions. It answers the question of why an organization or individual exists and why it does what it does. The “why” is the core motivation and the emotional connection that attracts and engages people.

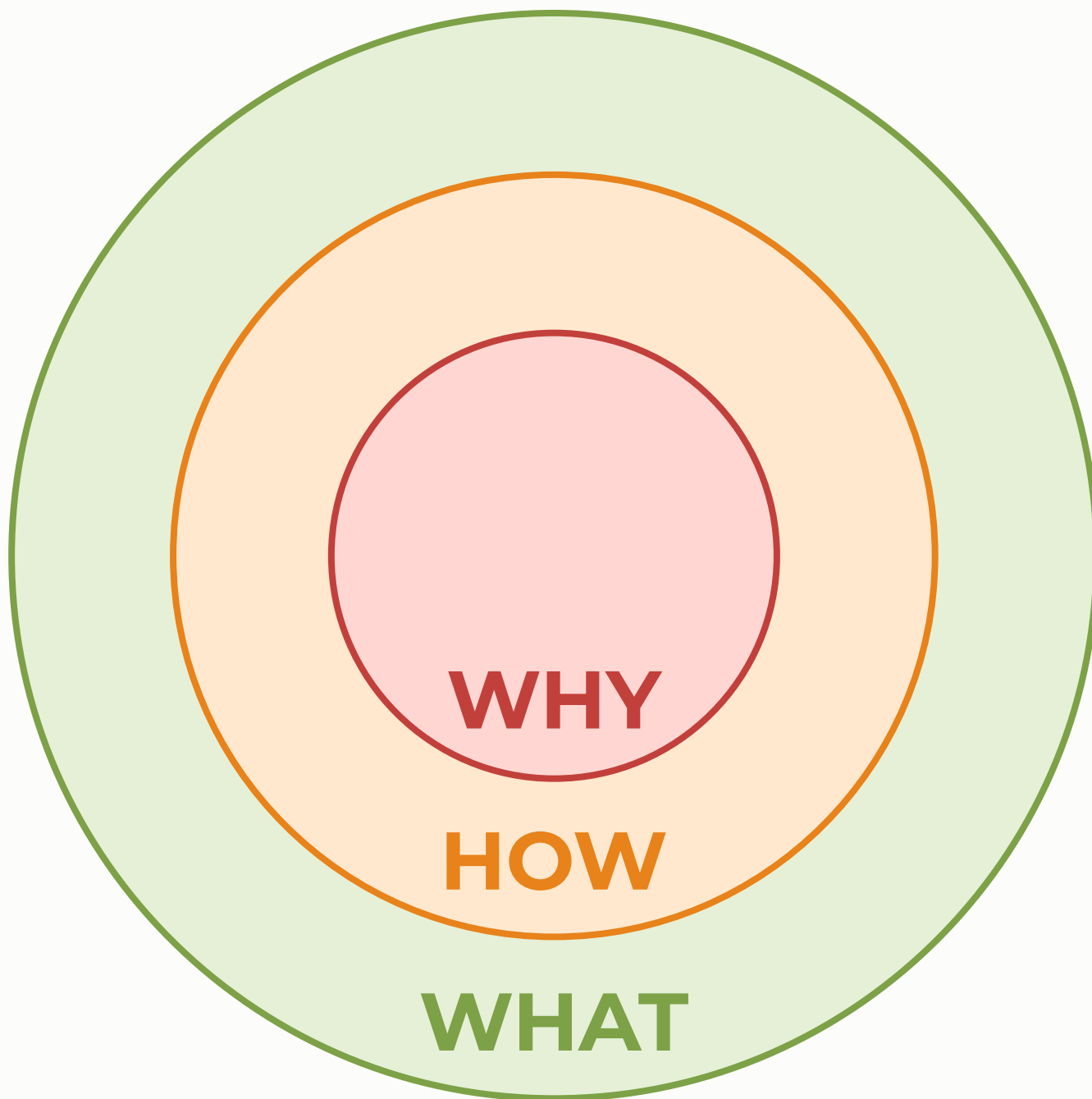
How: The middle circle represents the “how” of an organization or individual. It defines the unique value proposition, the guiding principles, or the differentiating approach that sets them apart. It outlines the strategies, processes, and actions employed to achieve the purpose and bring the “why” to life.

What: The outermost circle represents the “what” of an organization or individual. It includes the products, services, or actions that are tangible and visible to others. It represents the end results or offerings that an organization or individual delivers to fulfill their purpose and bring their “why” and “how” to reality.

The Golden Circle suggests that starting with the “why” is essential because it taps into the emotional drivers and creates a sense of purpose and inspiration. When the “why” is clearly communicated and understood, it resonates with like-minded individuals who are more likely to support and engage with the organization or individual. The “how” and “what” then serve as the means to fulfill that purpose.

By following the Golden Circle approach, organizations and individuals can better articulate their purpose, differentiate themselves, and build loyal relationships with customers, employees, and stakeholders. It encourages a focus on the deeper meaning and values behind actions, ultimately leading to greater success and fulfillment.

Based on your businesses core values, identify the “why,” “the how,” and “the what” of your business.



MISSION STATEMENT

A mission statement is a concise statement that captures the purpose, values, and aspirations of an organization. It communicates the company's core identity, guiding principles, and long-term goals, serving as a guiding compass for decision-making and defining its overall direction.

When writing your mission statement be sure to refer to your core values and golden circle. Your mission statement should begin to be an outward reflection of your values and purpose.

Start with being idealistic, not realistic.

Be lean. Don't be too wordy; a mission statement should be easy to memorize.

Examples:

1. **'To inspire and nurture the human spirit— one person, one cup, and one neighborhood at a time' - Starbucks**
2. **'To organize the world's information and make it universally accessible and useful.' - Google**

OUR MISSION

BRAND POSITIONING STATEMENT

A brand positioning statement is a concise statement that defines how a company wants to be perceived in the market. It highlights the unique value proposition, target audience, and key points of differentiation, helping to establish a clear and distinct position relative to competitors. A brand positioning statement is primarily intended for an internal audience.

EXAMPLES:

Home Depot: The hardware department store for do-it-yourselfers.

Volvo: For upscale American families, Volvo is the family automobile that offers maximum safety.

A brand positioning statement can be used to position (or find your position) in the market.

For example, if you have a supplement company, is your product for children or adults? Is it for physically active or less active people?

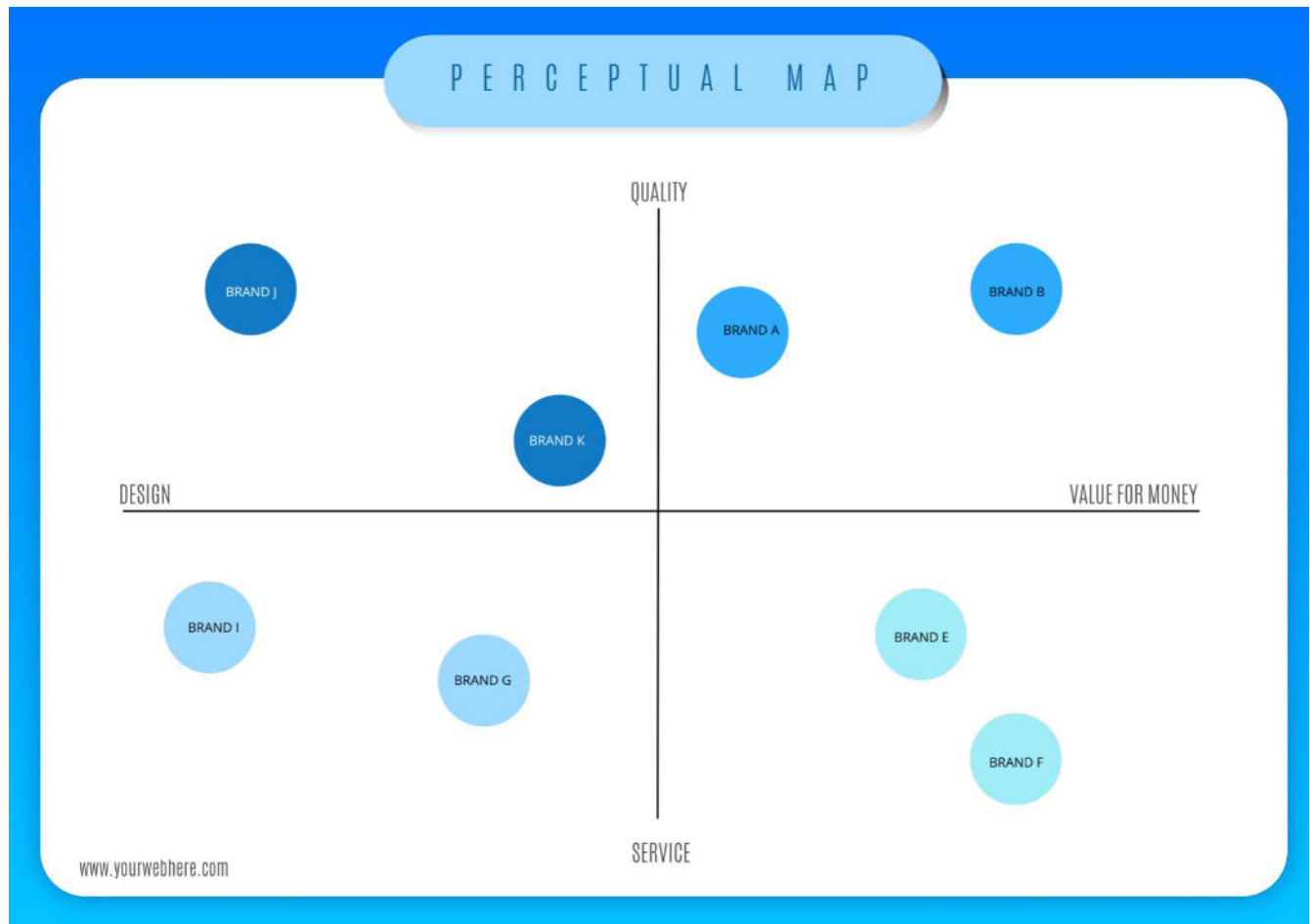
FORMULA:

For [target customer], [company name] is the [defined target market] that delivers [competitive advantage]

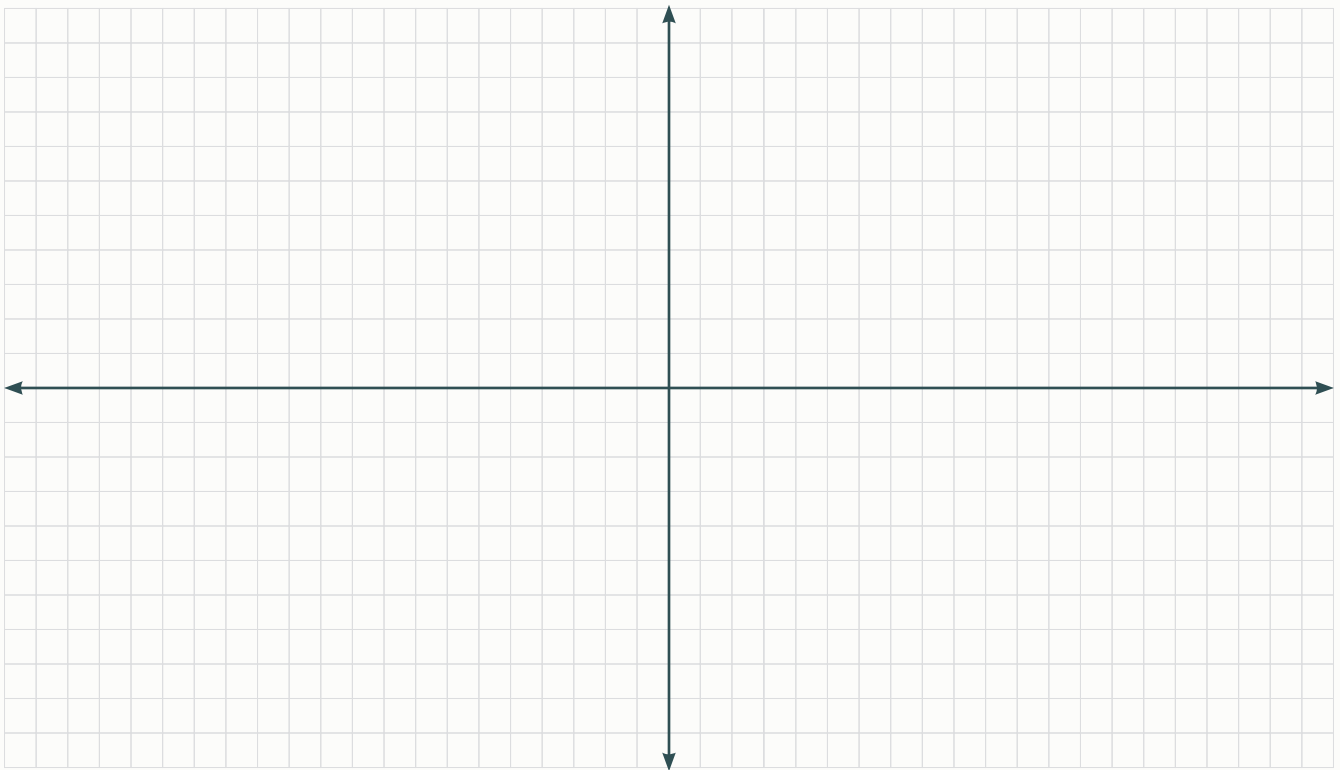
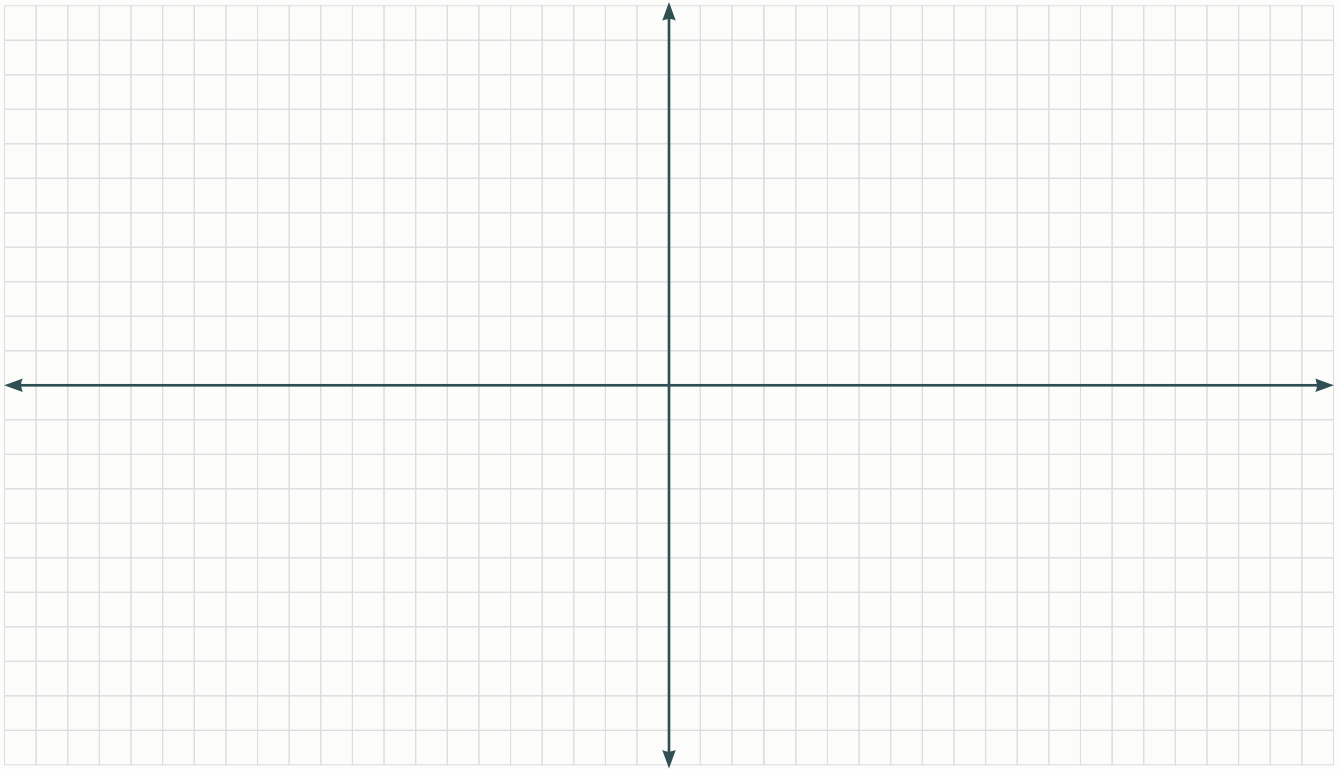
BRAND POSITIONING MAP

You can find your location as well as your competitors on a position map. This will help you as you make internal decisions and in your marketing.

Example Brand Positioning Map



YOUR BRAND POSITION



BRAND PROMISE

A Brand promise tells customers what you do best. It must be something that you can deliver on consistently.

Some questions to consider include:

- ▲ What problems do you solve for your customers?
- ▲ What gap(s) do you fill? How do you fill that gap(s)?
- ▲ What ending do you create for customers?
- ▲ Who is your target customer?
- ▲ Where do you offer services/products?
- ▲ What differentiates you from your competitors?

WHAT Industry	
CATEGORY niche	
WHO customer	
WHERE market geography	
WHEN underlying trend	

BRAND PROMISE STATEMENT

The only _____
that _____
for _____
in _____
in an era of _____



Things to Remember:

Your Brand Promise Should be something that is:

- Valuable to Customers
- Something that you control
- Something that you can deliver consistently

TAGLINE

A tagline is a short external statement used in marketing that reflects positioning statement and brand promise.

Examples (refer to examples of brand positioning statements to compare):

Home Depot: You can do it. We can help.

Volvo: For life.

DIFFERENTIATOR

OUR COMPANY

OUR COMPETITION

KNOWN FOR

--	--

FEELING

--	--

GUARANTEE

--	--

IDENTITY PROMISE

--	--

Differentiator Statement

At _____, we are known for _____,
which makes our clients feel _____. We guarantee _____
so that our clients can _____.

SECTION 5

ARCHETYPES

Archetype theory, developed by Swiss psychiatrist Carl Jung, suggests that certain universal patterns or themes exist in the collective unconscious of all human beings. These archetypes are ingrained in our psychology and influence our behaviors, thoughts, and emotions.

In the context of business, understanding and utilizing archetypes can be powerful for shaping a company's brand, operations, and marketing efforts. Here's a summary of the importance of archetype theory for business operators:

- 1. Brand Identity and Differentiation:** Archetypes provide a framework for defining a company's brand identity. By identifying the primary archetype that aligns with the company's values, personality, and offerings, businesses can differentiate themselves from competitors. This helps create a distinct and authentic brand that resonates with customers.
- 2. Emotional Connection and Customer Engagement:** Archetypes tap into universal themes and evoke deep emotional responses. Aligning a business's messaging, imagery, and customer experience with a specific archetype helps establish a strong emotional connection with customers. This connection enhances customer loyalty, engagement, and long-term relationships.
- 3. Consistency and Authenticity:** Knowing and staying true to the company's archetype ensures consistency in all aspects of the business. From product development to marketing campaigns, operations to customer service, an archetype acts as a guiding principle for maintaining a coherent brand identity. Consistency and authenticity build trust and credibility among customers.
- 4. Targeted Marketing and Communication:** Each archetype has unique characteristics and appeals to specific customer segments. Understanding the target audience's archetype enables businesses to tailor their marketing and communication strategies accordingly. By using archetypal storytelling, imagery, and language, businesses can effectively engage and resonate with their desired customer base.
- 5. Innovation and Decision-Making:** Archetype theory encourages businesses to explore new ideas and innovate within the boundaries of their archetype. It provides a foundation for creative problem-solving, strategic decision-making, and product/service development. Understanding the archetype allows businesses to identify opportunities that align with their brand and values.
- 6. Employee Alignment and Culture:** Archetypes also extend to internal operations and company culture. Identifying the company's archetype helps align employees with the brand's vision and values. It fosters a cohesive culture, enhances teamwork, and inspires employees to embody the desired archetype, driving overall organizational success.

There are four groups of archetypes. The archetypes in each group are connected by a shared core fulfillment. Brands that can authentically express the fulfillment that their target audience is looking for AND DELIVER that experience are the brands that grow and last.

1. Connection	2. Structure	3. Paradise	4. Leave a mark
a. Lover.	a. Caregiver.	a. Innocent.	a. Outlaw.
b. Jester.	b. Ruler.	b. Sage.	b. Magician.
c. Everyman.	c. Creator.	c. Explorer.	c. Hero.

Below is a brief description of each of the archetypes, along with some of the desires they help fulfill.

1. **Lover:** embodies the pursuit of love, beauty, and emotional fulfillment.
 - a. Cultivate emotional connections.
 - b. Inspire passion.
 - c. Promote self-love and care.
 - d. Foster relationships and community.
 - e. Celebrate beauty and aesthetics.
 - f. Support authentic expression.
2. **Jester:** challenge conventions, question authority, and use humor to highlight the absurdities of life.
 - a. Provide joy and entertainment.
 - b. Challenge the status quo.
 - c. Promote levity and stress relief.
 - d. Encourage creative thinking.
 - e. Break down barriers.
 - f. Provide social commentary.
3. **Everyman:** represents the ordinary, relatable, and down-to-earth figure who represents the common human experience.
 - a. Foster a sense of belonging.
 - b. Inspire self-confidence.
 - c. Provide practical solutions.
 - d. Encourage empathy and understanding.
 - e. Promote authenticity.
 - f. Celebrate the ordinary.
4. **Caregiver:** represents the nurturing, compassionate, and selfless figure who provides care, support, and protection to others.
 - a. Provide comfort and reassurance.
 - b. Inspire self-care and well-being.
 - c. Foster sense of community.

- d. Advocate for others.
 - e. Offer advice.
 - f. Promote acts of kindness.
5. **Ruler:** represents the authoritative, responsible, and influential figure who governs and leads with wisdom, fairness, and integrity.
- a. Cultivate a sense of empowerment.
 - b. Provide guidance and direction.
 - c. Encourage responsibility and accountability.
 - d. Promote fairness and justice.
 - e. Inspire leadership.
 - f. Foster a sense of order.
6. **Creator:** The Creator archetype represents the visionary, innovative, and artistic figure who brings new ideas, inventions, and creations into the world.
- a. Encourage self expression.
 - b. Foster innovation and originality.
 - c. Provide inspiration and motivation.
 - d. Offer tools and resources.
 - e. Nurture personal growth.
 - f. Celebrate individuality and diversity.
7. **Innocent:** The Innocent archetype represents the pure, optimistic, and trusting figure who sees the world with childlike wonder and believes in the inherent goodness of people.
- a. Inspire optimism and positivity.
 - b. Provide a sense of purity and simplicity.
 - c. Encourage trust and faith.
 - d. Nurture a sense of wonder and curiosity
 - e. Promote well-being and innocence
 - f. Celebrate goodness and purity
8. **Sage:** The Sage archetype represents the wise, knowledgeable, and introspective figure who seeks truth, understanding, and enlightenment.
- a. Offer wisdom and knowledge
 - b. Inspire intellectual curiosity and growth
 - c. Foster critical thinking
 - d. Promote self-reflection and introspection
 - e. Guide individuals on their journeys
 - f. Promote clarity and understanding
9. **Explorer:** The Explorer archetype represents the adventurous, curious, and pioneering figure who seeks new experiences, discoveries, and personal growth.

- a. Encourage personal growth and self-discovery
 - b. Inspire curiosity
 - c. Promote courage and resilience
 - d. Facilitate a sense of adventure and freedom
 - e. Foster a connection with nature
 - f. Cultivate a sense of discovery and excitement
- 10. Outlaw:** The Outlaw archetype represents the rebellious, non-conformist, and provocative figure who challenges established norms, rules, and authority.
- a. Encourage individuality and self-expression
 - b. Inspire rebellion against injustice
 - c. Foster independence and self-reliance
 - d. Promote change and push boundaries
 - e. Create a sense of community and belonging
 - f. Cultivate resilience and courage
- 11. Magician:** The Magician archetype represents the visionary, transformative, and mystical figure who harnesses supernatural or hidden powers to create change and unlock human potential.
- a. Facilitate personal transformation
 - b. Inspire imagination and possibility
 - c. Provide guidance and wisdom
 - d. Foster a sense of awe and wonder
 - e. Cultivate intuition
 - f. Promote personal empowerment
- 12. Hero:** Heroes are often driven by a strong sense of purpose, a desire to make a positive impact, and a willingness to sacrifice for the greater good.
- a. Encourage personal growth
 - b. Inspire action
 - c. Provide purpose
 - d. Offer guidance and support
 - e. Build confidence
 - f. Foster a sense of identity

To begin to identify your archetype, consider the following:

- 1.** What kind of personality does your company have? (Serious or lighthearted? Innovative or traditional? Analytical or intuitive?)

- 2.** Who is your target audience and ideal customer? (see pg XX)

- 3.** What is different about your company?

- 4.** What kind of personality do your competitors have? How are you different in this way?

- 5.** Put your company in a story; what kind of guide are you?

- 6.** Consider getting customer feedback; what are their perceptions of your company?

- 7.** How do you want customers to perceive your company?

- 8.** Take an online survey (link) – don't just go with the results but also consider them.

- 9.** Hold a brainstorming session with stakeholders to consider these questions.

- 10.** What needs and inner desires does your company satisfy for your customers?



CORE CUSTOMER, HEROES, AND STORY

Stories have a profound impact on humans as they tap into our innate desire for connection, evoke emotions, and make complex information relatable and memorable, allowing us to forge deep and meaningful connections with characters, ideas, and experiences. The most effective brands use their core values, brand promise, and archetypal powers to harness the influence of storytelling in their marketing and communications with their customers.

Story Brand is a marketing framework developed by Donald Miller that emphasizes the power of storytelling to engage customers and clarify a brand's message. It provides a structured approach to crafting a clear and compelling brand story by identifying the target audience, understanding their challenges, and positioning the brand as the guide that helps them overcome those challenges. Story Brand's usefulness lies in its ability to differentiate a brand, engage customers on an emotional level, and create a consistent and compelling message across various marketing channels. By leveraging storytelling principles, Story Brand helps businesses effectively communicate their value proposition, connect with their audience, and ultimately drive business growth.

In Story Brand, a brand script is a strategic document that outlines the key elements of a brand's messaging using the Story Brand framework. It provides a step-by-step guide for crafting a compelling and clear brand story, including identifying the target audience, understanding their challenges, positioning the brand as the guide, presenting a plan, and offering a clear call to action. The brand script serves as a blueprint for consistent and effective communication across various marketing channels to engage customers and drive business growth.

A brand script consists of seven key parts:

Character: Clearly identify the target audience or customer as the hero of the story.

Problem: Highlight the challenges, frustrations, or pain points that the hero is facing.

Guide: Introduce the brand as the guide who understands the hero's problems and has a plan to help them overcome those challenges.

Plan: Present a clear and actionable plan that outlines the steps the hero needs to take to solve their problems.

Call to Action: Clearly state what action the hero needs to take and how they can engage with the brand to achieve the desired outcome.

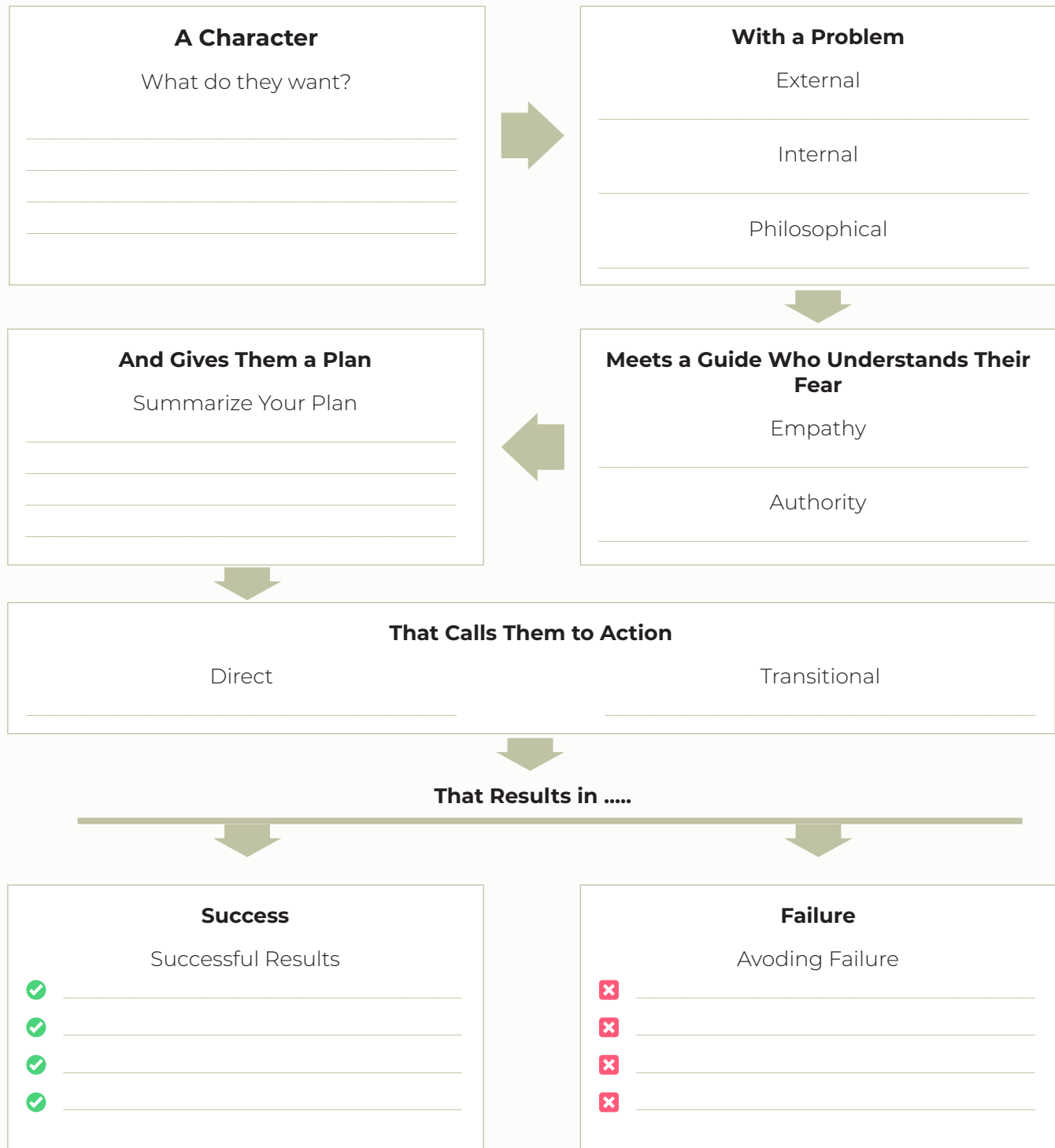
Success: Paint a vivid picture of how the hero's life will improve once they implement the brand's solution and overcome their challenges.

Failure: Explain the negative consequences that the hero may face if they choose not to engage with the brand or fail to take action.

By structuring a brand's messaging using these seven parts, the brand script creates a compelling and persuasive narrative that resonates with the target audience, engages their attention, and motivates them to take action.

- 1.** Character.
 - a. What do they want?
- 2.** Has a problem.
 - a. Who is the villain?
 - b. External problem - tangible and usually the most obvious.
 - c. Internal problem - emotional and psychological struggles (for example, fears).
 - d. Philosophical problem - the way the world "ought to be".
- 3.** Meets guide.
 - a. Authority.
 - b. Empathy.
- 4.** Presents a plan.
 - a. Clearly-defined action steps.
 - i. What steps do they need to take?
 - ii. What will life look like AFTER they take these steps?
- 5.** Call to action.
 - a. Direct: Will you marry me?
 - b. Transitional: Will you keep dating me?
- 6.** Avoid failure.
 - a. What do they avoid by following your CTA.
- 7.** End in success.
 - a. What will life be like because they followed your CTA? Keep the problems in mind. Did you solve them?

YOUR STORY



BUYER PERSONA & AVATAR

Take your target audience from generals to specific.

A persona refers to a fictional representation of a target customer or audience segment. It is a detailed profile that describes the characteristics, demographics, behaviors, motivations, goals, and pain points of the ideal customer or a specific segment within the target market. Personas provide a humanized and relatable understanding of the target audience, enabling marketers to create more personalized and effective marketing campaigns. Creating personas allows you to create marketing assets and collateral to a specific “person” who represents your audience and “hero” rather than a nameless and faceless crowd.

Persona	Women ages 35-50, married, has at least one child, leads an active lifestyle, lives in urban or suburban areas, has a bachelor’s degree, household income of \$100k+
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PERSONA	Name	Whitney Sanderson
	Age	37
	Gender	Female
	Background	She was born near Chicago and now lives just outside of the city. She is an only child and grew up in an upper/middle class family. She was married at 25.
	Demographics	Lives outside of Chicago. She has a 9 year old son. She works full time as a marketer and her husband is in finance. Their combined income is 225k/year
	Psychographics including pain points	She loves to get out of the city and suburbs and go hiking and camping with her family. She runs in a nearby park every morning. She is Christian but does not align with any denomination.

Take your target audience from generals to specific.



Activity

Take some time to define your audience persona. Be sure to consider demographics, psychographics, background, and behaviors. Then create an avatar that represents that persona. Be sure you keep these in line with your “hero.”

Persona	
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PERSONA	Name	
	Age	
	Gender	
	Background	
	Demographics	
	Psychographics including pain points	

SECTION 6

TWO YEAR FORECAST

	Current	Goal
Date:	_____/____/____	_____/____/____
Revenue:	_____	_____
Gross Profit:	_____	_____
Net Profit:	_____	_____
Deliverables:	_____	_____

What do you need in your company to help you get those results?

How many people?

New products or markets?

Additional Services?

Clients?

Where do you see yourself in 2 years?

Locations:

Departments:

Marketing Channels:

90 DAY COMMITMENT & MILESTONES

L	LEADERSHIP
F	FINANCE
S	SALES
M	MARKETING
O	OPERATIONS
P	PERSONNEL

WINS

Departmental WINS and Individual WINS should be: SET, TRACKED, RECORDED, REPORTED, and LINKED (Individual WINS should connect and feed into Departmental WINS)

Use the following as templates or guides to create an ongoing reporting system that works within your organization.

L	METRIC	TARGET
O	METRIC	TARGET
M	METRIC	TARGET
S	METRIC	TARGET
F	METRIC	TARGET
P	METRIC	TARGET

Activity



A Weekly Important Number (WIN) should be identified for each department and position of the company. There are many KPIs that should be tracked, measured, and reported across the company (as previously discussed). A WIN, should be the key metric that each person is focused on for their own position. WINs should be tracked and reported in a similar way to the Stoplight report.

PILLAR	NAME	WIN	TARGET
Finance	John Smith	Revenue	\$50,000

ONE YEAR ONE SHEETER

3 Clear Objectives in each of the pillars

LEADERSHIP	CORE VALUES		MISSION		PURPOSE		VISION	
OPERATIONS	Y1		Y2		Y5		BRICK MEETING	
	_____ BRICKS		_____ BRICKS		_____ BRICKS			
MARKETING	BRAND PROMISE		CORE CUSTOMER		DIFFERENTIATOR		ALIGN MEETING	
SALES	BRAND PROMISE		CORE CUSTOMER		DIFFERENTIATOR		WIN MEETING	
FINANCE	REVENUE		PROFIT		NET PROFIT		FOUNDATION FRIDAY	
	1		1		1			
	3		3		3			
	5		5		5			
MARKETING	KEY HIRES							
	Y1							
	Y3							
	Y5							
								TEAM RALLY
								QUARTERLY REVIEW
								ANNUAL PLANNING

A WORD OR TWO ABOUT CHANGE

CAUTIONS OF CHANGE

As you begin to implement change, you must have a good grasp on your productivity in order to see if there is a reduction. Productivity is the first thing to suffer during times of change.

Don't be surprised by turnover. As you stretch and grow, the people who got you where you currently are will not always be the ones who go with you to the next level. However, be sure you monitor how you deliver and lead the change. You don't want to drive away your good employees. You will need them to LEAD the change with you.

Change is often difficult and uncomfortable. Be persistent, but give yourself and your team appropriate leeway. Don't mistakenly think that people will hear and understand you the first time you say, do, or introduce something. You will need to repeat it many times.

During times of change, you must "re-recruit" your people. Make sure you do not allow your good employees to get away during such times.

Be sure you are creating an environment where people feel comfortable asking questions and communicating with the correct people (yourself included). If you don't, they will still ask questions and talk — just to the wrong people, which can undermine what you're trying to build. Rome was eroded from within.

The final thing to be aware of during periods of change are your profits. Make sure you are watching your bottom line very closely during change.

Don't panic if you don't see immediate change. Track leading indicators, if they start to turn, trust the process. It takes time to turn a ship!

APPENDIX

APPROVAL PROCESSES



Activity

Take some time to think about actions that need to take place regularly within the company that you are in charge of. Now take some time to determine what can be delegated to others. What will they need to do on their own? What will they need to do and then tell you about? What will they need your approval to do?

DO IT

**DO IT,
THEN TELL ME**

**DON'T DO WITHOUT
APPROVAL**

SWOT

Strengths

What do we do well?

What resources do we have to draw from?

Weaknesses

How could we improve?

What resources do we lack?

Opportunities

What current opportunities are available to us?

What trends could we take advantage of?

Threats

What threats could harm us?

What does our competition do better than us?



3 Ss OF LEAN

Sweep (Seiri): This step focuses on removing unnecessary items and clutter from the workspace. It involves identifying and eliminating any tools, materials, or equipment that are not required for current operations. By decluttering the workspace, it becomes easier to locate and access necessary items, reduce distractions, and create a safer and more efficient work environment.

Sort (Seiton): The Sort step involves arranging and organizing the remaining items in a logical and efficient manner. It includes defining specific storage locations for tools and materials, labelling them clearly, and ensuring easy access. The goal is to eliminate waste caused by time spent searching for items, reduce errors, and improve productivity.

Standardize (Seiketsu): Standardization aims to establish consistent practices and procedures throughout the organization. This involves creating and implementing standardized work instructions, visual cues, and checklists to ensure that processes are followed consistently. Standardization helps eliminate variations, improve efficiency, and promote a culture of continuous improvement.

ADDITIONAL RESOURCES

1. Leadership and Self Deception by **The Arbinger Institute**
2. Story Brand by **Donald Miller**
3. Creativity Inc. by **Ed Catmull & Amy Wallace**
4. From 0 to 1 by **Peter Thiel & Blake Masters**
5. The Innovators Dilemma by **Clayton Christensen**
6. 2 Second Lean by **Paul Akers**
7. The Hero and The Outlaw by **Margaret Mark & Carol S. Pearson**
8. Positive Leadership training by **Shawn Quinn**
9. Brand Academy by **Brian Halley**

NOTES