

Workbook 1

Let's Talk About You

Customer Service

- 1/ What does the client journey look like for your business?
- 2/ What are the key moments of truth (contact points) in that journey?
- 3/ What could you do at each moment of truth to differentiate yourself (what would blow your client's mind or make a step truly memorable)?
- 4/ What obstacles are there currently that prevent you from delivering this ideal service?
- 5/ What would need to happen for you to remove those obstacles?

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Culture (Values):

- 6/ What are your core values?
- 7/ Do they really mean something to you? What are your stories around each value?
- 8/ How do you personally live them at work and in your daily life?
- 9/ Are they big values that really excite you? If not, why not?
Do you need to revisit them and make them bigger?
- 10/ What's the bigger value you add to your clients and to society? A goal bigger than money?

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Employee training and development:

- 11/ For where your business is heading over the next 3 years and 10 years (see business plan), what sort of team will you need to have in place?
- 12/ How can you develop your existing team to fit your future needs?
- 13/ What skills, knowledge and attitudes will your future team need to possess to help the business achieve its goals?
- 14/ What gaps can you identify for your team right now that might need addressing?
- 15/ Can you paint the picture for your existing team as to the career opportunities that might come from achieving your goals?
- 16/ Development applies to you as well. What will you need to be/become as a leader to own and direct this business you are creating?

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Employee training and development (continued):

17/ What skills, knowledge and attitudes will you need to help the business achieve it's goals?

18/ What gaps can you identify for yourself right now that might need addressing?

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