

Use this worksheet to get started in identifying your vision in your role for your office for your customers. What do you see? 1. In the box TODAY: write out what you see happening today in your business. Who do you serve? How much support do you have? What is happening today??? 2. In the Box TOMORROW: Write what you want to see happen. What are the goals? What experiences do you want to create? 3. In the next box, WHAT WILL IT TAKE: write down what it's going to take to make those goals happen? These might take some finances, training etc. 4. In the box HOW AM I GOING TO MAKE IT HAPPEN: write what you are going to do to make that happen? What are you personally going to take responsibility for and help with? What CAN you do? Use the next page as a guide for ideas that you feel could be in the boxes.

TODAY

TOMORROW

**WHAT WILL IT
TAKE?**

**HOW AM I GOING TO
MAKE IT HAPPEN?**

Assess Phase: When the customer is deciding if they want to do business with you or support you. They are learning what to expect from your business and sharing their expectations for the relationship. They can be assessing you long before they approach you about doing work together. This could be through Facebook, social media outlets, at events, through friends...etc.

Admit Phase: This phase begins when the customer admits that they have a problem or a need that they believe you-the business—can solve it. As a result, they buy your products, sign up for your services, or make a donation to come alongside you. They have been assessing you and you have proven that you can help them and others they want to help. They are building trust here and need to be affirmed that their hope to work together with you is the right move.

Affirm Phase: This phase is more commonly known as “buyer’s remorse” This phase begins when cost of services or contribution is laid out with the value of your services. If this phase is not embraced properly, the customer begins to doubt the decision they just made to work with you. Almost every business person has heard of buyer’s remorse, yet few do anything to counter the customer’s feeling of fear, doubt and uncertainty.

Activate: This phase begins with the first major post-sale/ post-donation interaction, when the relationship between customer and business first materializes in a meaningful way, the start of service, or an initial kickoff meeting to get things rolling.

Acclimate: In this phase, the customer learns about (and hopefully grows comfortable with) a business' way of doing business. Too many businesses that have delivered their product or service dozens or hundreds of times assume that everyone in the world knows their particular process. Don't forget that they are doing this for the first time. Set up clear milestones, and communication so your customer always knows what to expect. Walk them through the process.

Accomplish: This phase occurs when the customer achieves the result they were seeking when they decided to do good work with you in the first place. This may be the time they use a product or achieve the desired result. Whatever results the customer was looking for, if you deliver it you have achieved this phase,. If not, you will lose them. This phase is the most self-explanatory. Celebrate every milestone and acknowledge challenges along the way and how they worked through it.

Adopt: In this phase, the customer takes ownership of the relationship, leading the charge on deepening and strengthening the bond. They proudly show their support and affinity for your brand and are thrilled to be associated with your reputation. If you have done a good job accomplishing each phase up to this point, whenever they need services like yours again, they will go to you! To ensure this, don't forget to reward your committed customers for coming back. Provide discounts, throw in a bonus service, or offer them something for free return and business or referrals.

Advocate: In this phase, the customer becomes a raving fan, zealous promoter, and eager referral engine all in one. They develop into a built-in, unpaid, un-commissioned Marketing Representative, singing your praises far and wide to other potential customers who might benefit from your services. This phase is every organizations dream! Set up a referral program and flat out ask for a referral or testimonial It doesn't have to be awkward or complicated; be honest with them and ask them to tell a friend about you. Don't forget to reward them for their thoughtful efforts.

CORE VALUES	Scored reflection of SELF 1 (low) 5 (high)
Leadership - Do you lead by example, with patience and understanding for others? Are you someone to follow? Rate your decision to RISE and lead others ?	1 2 3 4 5
Joyful - Do you come at every obstacle or trial with joy? Wake up to each new day with Joy? Go to bed each day with JOY? How joyful do you feel you are everyday in your role?	1 2 3 4 5
Authentic - Are you ALL you in everything you do? In all the pieces you learn, in all the scripts that you memorize, be you with all of these core values wrapped into who you are. How authentic do you feel?	1 2 3 4 5
Service - How well do you go above and beyond for everyone, every time? Are customers WOWed and leave your business saying, "nobody has ever gone that far to help me?"	1 2 3 4 5
Prioritize - There will always be something that will come up. How well are you prioritizing in the order that puts lives impacted and business relationship first?	1 2 3 4 5
Urgency - Do you have a deeper reasoning for doing what you do each day that drives you to go above and beyond for each customer.	1 2 3 4 5
Responsibility - Do you take full ownership in every area within your organization? How much do you expect the highest outcome for customers and your community?	1 2 3 4 5
Communication - Are you are clear, concise, and compassionate when you communicate with your team and others? How well do you do at assuring your customers understand your purpose and vision for them?	1 2 3 4 5
Influence - People are watching you. Do you wake up with a desire to be a positive influence on the world? Your words and actions show where you influence others. How well do you feel you get up and ready to influence others in a positive way?	1 2 3 4 5
Resilience -There are days you will want to quit, or give up. Do you go back to your purpose, mission and what is most important to stay strong for others? How well?	1 2 3 4 5
Humility -When you are wrong, do you own it? When you mess up, do you admit it and apologize to anyone it affects? When you fail, do you fail forward and learn from each step? Growth happens from learning by mistakes. How well do you learn from your mistakes?	1 2 3 4 5
Honesty - Are you honest with your team, your customers, and yourself? Even when the truth is hard, do you tell it anyway? How would you rate yourself here?	1 2 3 4 5
Add a core value that is important to you:	1 2 3 4 5
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