

# *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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