

CUSTOMER-NEEDS ANALYZER



Answer the following questions to determine your customers' needs.

1. What are your customers' most difficult struggling moments?

2. What creative solutions could your team provide if your customers only knew to ask?

3. How can your team make it easier for your customers to work with you?

4. What outcomes do your customers want from your team? How do you know?

#1 rule of customer loyalty:

"Make it easy for me to do business with you."

BLAKE MORGAN

CUSTOMER-NEEDS INTERVIEW



To gain greater insight into your customers' needs, ask them these questions.

1. What are your most important goals? What is the impact of achieving them?

2. What challenges are you trying to solve? Which is most important?

3. What has prevented you from achieving these goals or solving these challenges before now?

4. What could my team do to make it easier for you to work with us?

5. What else do we need to know? What questions should we be asking you?

TEAM-CAPABILITIES ANALYZER

Assess your team's core capabilities and relevance.

INITIALS	RIGHT POSITION? WHY?/WHY NOT?	NEXT STEPS FOR THIS PERSON



Answer the following questions to determine your team's capabilities.

1. What is unique and distinctive about your team?

2. Does your team lack some critical skills or capabilities needed to perform with excellence? If so, what are they?

3. If you questioned on the previous page whether this person was in the right position, what has happened recently that has made you feel this way? Is there anything you haven't done?

4. Does the team have any empty spots? Are any key roles (currently existing or not) not filled? If so, which ones?

5. Are there people on your team who have strengths that complement your areas of weakness? Who are they and what strengths do they bring?

6. Who could take your place?

STRATEGIC-CONTEXT ANALYZER

1. What organizational strategies are relevant to your team and why?

2. Identify the most relevant large-scale forces that impact your team. Use the list below to generate ideas. On the following page, describe the impact and how your team will respond.

CONTEXTUAL FORCES

- Leadership changes
- Budget issues
- Merger, acquisition, or reorganization
- Legislative changes
- Competitor moves
- Industry dynamics (consolidation, fragmentation, etc.)
- Customer trends
- Business-model changes
- Supplier dynamics
- Macroeconomic forces (interest rates, etc.)
- Disruptive technologies
- Labor relations
- Demographic trends
- Globalization
- Other



CONTEXTUAL FORCE	
IMPACT <hr/> <hr/> <hr/> <hr/>	OUR TEAM'S RESPONSE <hr/> <hr/> <hr/> <hr/>
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BOTTOM-LINE ANALYZER

Building Blocks

BUILDING BLOCK	DEFINITION
CASH	Cash is money in the bank. Cash flow is the difference between all the money that flows in and all the money that flows out in any given time period.
MARGIN	Margin is the money left over after paying expenses. To improve margin, you can increase revenue, decrease costs, or both.
VELOCITY	Velocity means speed—how fast and how hard you make your assets work to earn more money. Decreasing cycle time, increasing inventory turnover, and increasing employee productivity are examples of velocity.
GROWTH	Growth measures whether the organization is producing more or getting larger. Growth must be profitable and sustainable.



Identify how your team impacts each building block directly or indirectly. Be specific and use examples.

BUILDING BLOCK	HOW DOES YOUR TEAM IMPACT THIS BUILDING BLOCK?
CASH How does your team increase the organization's ability to generate cash?	
MARGIN How can your team reduce expenses or save the organization money?	
VELOCITY How does your team improve the speed of business for the organization?	
GROWTH How does your team directly or indirectly affect the organization's ability to grow profitably and sustainably?	