



moving past
DISASTER

Develop Your Business Next Normal

Marshall Atkinson

moving past **DISASTER**

Develop Your Business Next Normal



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Library of Congress Cataloging-In-Publication Data

Name: Atkinson, Marshall, author.

Title: Moving Past Disaster: Develop your
next normal / Marshall Atkinson

Description: Mesa: Atkinson Consulting LLC [2020]

Identifiers: Library of Congress Control Number: 2020908919 |

ISBN 978-1-7350766-3-8 (paperback) | ISBN 978-1-7350766-0-7 (ebook .pdf) |

ISBN 978-1-7350766-1-4 (ebook .mobi) | ISBN 978-1-7350766-2-1 (ebook Epub) |

ISBN 978-1-7350766-4-5 (download audio file)

Subjects: Business planning. | Problem solving. | Strategic Planning. |

Creative idea generation

Written and published in the United States of America

www.movingpastdisaster.com

For Jody and Jack

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Forward by Mark Coudray

In the summer of 1973, I was 19 when I started my company, Serigraphic Designs. In the fall, we had the Arab Oil Embargo. October 1987 the stock market crashed, second only to the Crash of '29 and the Great Depression. 2001 saw the terrorist attacks of 9/11. We weathered all of those, though painfully. There was a much bigger crisis about to unfold.

My own company was on a roll in 2007. Business was great, and we had strong growth. By then, we had already printed close to 30 million shirts since I started in 1973. We'd won all kinds of awards and contributed significant technical advances to the industry.

We made the decision to expand and invested just shy of a million dollars of our own money into a new building and updated equipment. Life was good and we were building a state-of-the-art facility and starting to prepare for a bright future ahead. We moved into the new facility in January 2008.

Then came the financial and real estate market crash of 2008. Our sales dropped by 62%. We lost all our major accounts over a three to four-month period. The coronavirus pandemic is déjà vu all over again for me. I was confused and I didn't understand what was going on. Over the next year and a half, we injected another \$500,000 into the business to keep it running.

Then, in 2010, more disaster struck my family when my 23-year old son Daniel was diagnosed with leukemia. His insurance ran out. We lost everything trying to keep him alive. Unfortunately, Daniel passed away in May of 2012 after spending nineteen months of his life in the hospital.

It was a very sad time, and our lives were turned upside down. We lost our son, our buildings, investments, customers, and all of our cash. The only thing we had was our house and we were holding on by a thread.

By nature, I'm an analytical person. I tried to remain as calm as I could. How could a successful 38-year-old business with \$1.5M in the bank be so vulnerable? I did an analysis of my own business. What I uncovered was startling. Sadly, EVERY business I looked at suffered from the same vulnerabilities and weakness. The pain you may be experiencing means you are a victim of this as well.

From all of this I developed CatalystPlan.com. Catalyst is a series of courses, trainings and coaching designed specifically to correct and strengthen ANY business. To date, over 180 companies have been through the formal programs. Many of you who've attended a Shirt Lab event or listened to my guest appearances on decorated apparel industry podcasts have been introduced to some of these concepts and lessons.

Here's something to consider for yourself: We don't know what the future holds for us. Getting organized and prepared can help us respond and cope with the crisis. We need to learn how we can take the information from these uncertain times and turn them to our benefit.

The creative mental models that Marshall Atkinson is using in “*Moving Past Disaster*” have been around for some time and are classic techniques used to forge new ideas. I have included them in Catalyst since 2017. I’ve known Marshall for many years, and he has worked with me on several Catalyst projects and is one of the Catalyst coaches on our weekly calls.

“*Moving Past Disaster*” is a significant work and represents Marshall’s thoughtful approach to dealing with an unexpected crisis. It will definitely help you and your business. All you need is an open mind and a willingness to do the work.

The lessons and worksheets will help you create and deploy new ideas for your business to find your way through whatever has impacted your company.

Stay positive and keep working on your business daily.

Mark Coudray

CatalystPlan.com

San Luis Obispo, CA

Author’s Note: *I’ve been part of Mark Coudray’s Catalyst program since November 2017. I’ve learned a lot as a coach/consultant from his programs. There’s no one more experienced for an event like COVID than Mark and he’s been preparing for a long time. Crisis situations are nothing new to the business world. Learn from Mark’s experience.*

Marshall Atkinson

Introduction

This book is written for you to assist in your business recovery from any type of event that has impacted your business and the ability to compete.

When disaster strikes, it causes a tremendous shock to your system. This could be from a financial disaster, personal or health crisis, or other tremendous circumstances that makes you question everything. The lasting effects of that event will echo for quite some time.

But this book isn't about what happened. This book is about what you can do to adjust and emerge from this situation and move forward toward success in business again.

You are going to have to get used to the idea of the next normal. Accept the idea that things are going to be different. Different ideas or actions don't have to be scary. In fact, being different can be an opportunity if you are open to it.

Inside are tips, checklists, exercises, examples, and many creative thought planning ideas to provoke you into action and guide you to a new successful future. Use the Workbook pages to help organize your thoughts, delegate tasks, or consider a new perspective. When you are finished reading this book and completing the exercises as outlined you will be able to:

- Snapshot your current problems
- Develop new ideas
- Create a new Business Plan
- Deploy a 2-Year Action Plan

Your situation was an event. Events end.

To triumphantly rise up from the ashes of this disaster you will need to put in the work, do some things differently, and believe it or not, make a few mistakes along the way. Not everything you try will work perfectly. You need to know and understand that from the beginning.

Seth Godin has a great quote that I think fits.

“The old rule was this: Create safe, ordinary products and combine them with great marketing. The new rule is: Create remarkable products that the right people seek out.” ¹

Let's get to work!

Marshall

Chapter One - Your Mindset

After a tragic event, it is common to have an increased level of uncertainty and fear. When we don't know the answers and it seems like we have lost control our natural position is to freeze. 2

It is extremely difficult to move forward at times like these. Everything you know about business and life is upside down.

When you can't control the conditions and the world around you, you must start controlling how you react to the situation. The power lies in how you respond.

Here's what I want to tell you today:

- **You can do difficult things because you've achieved success before. In your life, you have already overcome challenges.**
- **You can also make good choices and decisions because you have also already made those.**

Before your crisis event was everything in your life or business perfect? Of course not. It won't be going forward either. Where your mindset needs to be is in the willingness to take some steps and start working toward a better future.

What is important to remember is how you do things going forward.

Who you choose to spend your time with can influence your outcome. ³ You can choose to take charge of your life and react to this situation with positivity and optimism. In front of you are opportunities, but you have to be brave enough to recognize that and do the work to seize them.

The path ahead is unknown. Those willing to take steps toward achievement and success will be further down that road than others that live their life paralyzed by fear and uncertainty. ⁴

Are your shoes tied and ready to start down that path? Maybe not yet. But that's ok. This book is designed to assist you in the mental framework for recovery.

Expectations

First, think about moving forward as a new beginning. And with anything that we do that's new, there are expectations that we have that can color whether the result is good or bad in our minds.

As an illustrative example of this, I want you to imagine an apple on the counter in front of you. I'll bet sometime in your life you have eaten an apple.

So what happens when you pick it up and take a bite?

You know in your mind how it should taste. Maybe this particular one is a little too tart. Or it could be overly sweet. Maybe the texture is a little mushy, instead of firm. I hate that.

From past apple-eating experiences, you have an expectation of how that apple should register with your taste buds and it either is successful or it isn't.

But what if you took a bite of that apple with the mindset that you've never tasted an apple before in your life?

You could enjoy the crisp texture and explosion of flavor on your tongue. Maybe the juice drips down your chin. The apple is simply enjoyed for what it is now, not compared to the previous apples you've eaten.

If you experience things such as eating an apple from a fresh perspective, you are not coloring your judgment on that experience with anything that has happened before. Therefore your mind is free to react to it based on the current information only.

You aren't concerned with *how it should be*, only what it is now. 5

I'm using this apple taste-test illustration to help you understand your own mindset in facing a new future for you and your business. Don't get caught up in the idea of *how it should be*.

Because in your mind, that can differ greatly from the reality that is before you.

That apple never tastes the same as what's in your mind. If you are basing decisions on the expectations of *how it should be*, this could lead to disappointment. Disappointment ultimately leads to quitting.

Mindfulness experts often call the ability to experience things with openness to the *Beginner's Mind*.⁶ This is the mindset that is free of expectations and judgments.

The apple, of course, is a metaphor for anything in your life. Your business, health, relationships, people, experiences, or anything that is before you.

Like biting into that apple, if you choose to have an open mind and experience and react to things as they are now and not *how you think they should be*, you can remain positive and work through to a better solution to your problems.

How things should be from before your adversity will never again occur. Get used to the next normal.

It is a fresh apple to bite.

Recovery Is Going To Take Time

For some, when dealing with the recovery from a disaster-like event people always want to return to normal.

"No man ever steps in the same river twice, for it's not the same river and he's not the same man." - Heraclitus

That reality is in the past. This book is about discovering and building a new reality. You are going to need to put in the work and remain positive about it.

Later in this book, we'll explore some processes to use, but for now, let's simply focus on adopting the idea that this is going to be a Journey Toward Recovery. To do that, we want to take that apple bite with zero expectations and react to the outcome based on what happens, not what we think should happen.

Some good tips to remain positive:

- You can't boil the ocean. Don't even try. Look for ways that you can make a difference today. Right now. This morning. Focus on the work and the process, not the outcome.
- Look for positivity. Sales guru Jeffrey Gitomer says to always, "*Celebrate effort, not victory.*"⁷
- There is humor in bad situations. Approach things with a smile on your face and in your heart. Laughter spreads.
- Learn from mistakes. A "No" might mean "No" right now. "Yes" is around the corner. Keep chipping away.⁸
- Focus on the present. It is easy to get hung up in what happened. We are in rebuilding mode. Concentrate on what's before you now. You have work to do.⁹
- Surround yourself with positive people. Especially online. Share ideas, successes, and failures. How can you help each other?¹⁰
- Unfriend, unfollow or hide negative people. Don't get sucked into their orbit of despair.¹¹

To succeed you are going to need a Can-Do attitude.¹² This is the culture that you need in your company and on your new journey.

Chapter Two - What Does Your Future Hold?

While it is incredibly easy to stay in your foxhole and not think about the future, the best way to organize your thoughts and climb out of this situation is to set a course of action. For that, we need a goal.

Right now I want you to envision how things look in two years.

Why two years and not five or ten? Because two years is far enough away to make a sensible goal, but close enough that it seems achievable.

Two years. That is only twenty-four months away.

What is that incredible vision? Not the down in the mouth, poor pitiful me vision. Something incredible!

Set that marker. Plant that flag on top of that mountain.

In the course of this book, there are several worksheets with exercises for you to use to mentally map out different sections of your journey. We'll get to those soon, but for now, let's review a few things.

Everything Starts With Good Habits

For the most part, people are great dreamers and planners, but fairly poor at execution and performance. You know this to be true in your life, admit it.

All you should concentrate on is doing the right things that you are going to map out daily. Small wins. Every day. ¹³

They stack up.

What we don't want is a lot of time going by without any progress and then a flurry of activity at the end.

You'll fail with that.

Remember, it is *"An apple a day, keeps the doctor away."* Not, *"Eat thirty apples on the last day of the month, keeps the doctor away."*

Your job is to be working consistently towards that initial two-year goal that you are going to engineer. Right now, in the planning stages, you don't have to have all the answers. In fact, if you do have all the answers you aren't asking the right questions.

Working diligently with a consistent and predictable pace will get you to where you want to be. Discovering the unknown is part of that journey. ¹⁴

And that journey is the work that you are doing.

The Future Starts Now

But before you can start talking about the future, you need to seriously consider what's going on today. After your business crisis event, the world was turned upside down and the business you had before might not be viable or work the same way. There are four key elements¹⁵ that you should be concerned with here:

- **Changes in your customer's needs or habits**¹⁶
- **The relevance of your business core strategy**¹⁷
- **Changes in your current selling model**
- **The expectations on your actual results**

To get a handle on where to start, I've created a simple self-assessment for your business. Every company is different, and how you answer these questions will help you set up the answers to the creative brainstorming you will work on later.

It is important that you be brutally honest here.

Half-measures or descriptions that aren't based in reality won't get you the results that you want or desire.¹⁸ If you have a business partner or other leaders in your company that you trust and you want them to take the assessment it may be very beneficial to get all of the inputs before working out the plan later.

Think of it as therapeutic brainstorming.

Self-Assessment Worksheet

This is the critical place to start for using this book. Click the button and grab the Self-Assessment Worksheet and fill out your answers. Descriptions and instructions for each section are on the following pages.

[Get the Worksheet](#)

Self-Assessment Questions

Strengths

List any and all strengths that you feel your company possesses. Simply use bullet points.

These include your standing in your industry, skills, talents, products, financial reserves, patents, staff, social media presence, or any idea or tangible thing that has led to your success over the years, that still exists right now. What muscles can you flex? What are you most proud of? List them all.

Weaknesses

List any and all weaknesses that you feel your company has currently. Simply use bullet points.

These include challenges or issues you are currently facing, legal or financial trouble, employee problems, market share or diversification issues, or any other idea or tangible thing that you feel is a weakness for your company that you need to address now. List them all.

Needs

List any and all Needs that you feel your company has to take care of immediately. Simply use bullet points.

These are the ideas, problems, challenges, or actions that need to be addressed as soon as possible. You do not have to have the answer to how you are going to resolve them. Just list any and all immediate Needs.

Wants

List any and all Wants that you feel your company would like to handle "someday." These are not mandatory, but "nice-to-haves." Simply use bullet points.

What are the Wants that make sense for your company? If you had a magic wand, you would grant these wishes as they could make an impact, but they aren't necessarily as important as the immediate Needs on your list.

Describe The One Thing About Your Business That You Wish Was Different?

Now maybe a great time to start over or make a significant change. What's the one thing that has bugged you about your company? Describe that. By the way, you don't have to have an answer for how to change it. Just write down the one thing you want to change. If it helps, include the "why" you want the change. 19

3 Positive Things

List three positive things about your company. These can be about anything. Good or small. People or a product. It doesn't matter. Name the three positive things that stick out the most for you.

Bonus points if these are customer-focused positive ideas. 20

3 Negative Things

Alternatively, list three negative things about your company. Just like with the positive choices, these can be about anything. What stands out the most for you as the biggest negatives that you are saddled with currently?

Bonus points if these are customer-focused negative ideas. 21

What Is The Best Thing That Could Happen To Your Company?

Think positively about the future! What could happen that would be the ultimate level of awesomeness? Don't think small, think big! What is that Best Thing?

What Is The Worst Thing That Could Happen To Your Company?

Name your fear. Put it down on paper. What's the worst thing imaginable?

What Is Your Biggest Problem That You Face Right Now?

You know what it is.

Currently, given the situation, it is all you think about. Write down your biggest problem and identify it. Be detailed and descriptive. The more you articulate the challenge, the better understanding you have of your situation.

Get more details, data, or facts if you need them. You will be spending a lot of effort on this later, so write your answer down with clarity.

What Do You Need To Solve This Problem?

Maybe you have the answers, maybe you don't. It's ok. If you don't have the answer, write down *"need to research and come up with a plan to solve x."* If you have some of the answers, jot those down too. List anything and everything.

What is it going to take to conquer your biggest problem and have success? List everything you need. This can include things like training, new equipment, new staff, a new process, better marketing, or anything else that you can identify as something that you can use to resolve the situation.

Again, you don't have to have the answer or know how to solve it. Write it out as best you can.

Finished?

Good.

If you just skimmed through this section and didn't write anything down, I'm going to challenge you that maybe you aren't serious about getting your business moving forward with a positive trajectory.

Don't be that person.

Remember what Thomas Edison said, *"Opportunity is missed by most people because it is dressed in overalls and looks like work."*

The purpose of this book is to get your brain firing and working on a game plan to move your company forward. Don't miss your opportunity for success. Put on those overalls.

Print the worksheet forms and fill them out. You can fill it out online, as it is a Google Form too. Just rename it with your company name. Your success with this book is directly linked to the amount of effort you put into doing the activities.

Meaningful change is very hard to do. 22

Also, it should have been fairly difficult to answer a few of those questions. Maybe you had to ponder the possibilities or look up some information. I'm sure a few of you had to have a conversation with someone.

These tasks may seem to be ambiguous and hard. Nothing in life is easy, nor will be the answers to how you move past your personal disaster.

Reread all of your answers to the questions. Add or edit anything now.

In fact, I'd like you to sleep on these or wait a day or two before moving to the next section.

Trust me, your brain will keep working on it. Napoleon Hill said, "*When one is truly ready for a thing, it puts in its appearance.*"²³ How many times has a great idea happened when you are in the shower, mowing your lawn, or driving your car?

Your brain can actively work on this, even when you are not.

When you are ready, reread all of your answers again. What's missing? Are you happy with what you wrote? If so, that's great, move onto the next section.

If not, keep working on it until you are satisfied that the self-assessment is a true reflection of your current situation.

This isn't a race. Make sure it is correct.

If you asked other people to help with this, pull all of the answers together into one document. Make sure that everyone is on the same page with the current situation and the Self-Assessment Worksheet is an acceptable written version of your current reality.

Chapter 3 - Creative Problem Solving

By now you should have a good understanding of the challenges you face in detail. If you feel that this is not the case, go back and add or edit anything on the Self-Assessment Worksheet. It is crucial to this process that you have the facts, data, opinions, and ideas associated with the problems that you need to solve for your business completely laid out before you.

In this chapter, we'll take all of that and use it creatively to reshape the business into something new or functionally better. That information is essentially the ingredients for the recipe that we'll be cooking.

There are two different creative methods that we will employ here. Both come from different sourcebooks from two different authors.

The first is going to be about breaking down the mental locks that you have on these problems using some techniques that are found in the book *"Whack on the Side of the Head"* by Roger von Oech.²⁴ This book has been around a while, as it was published in 1983, and these methodologies have been one of my favorite ways to unlock the creativity that I've used over the years.

The second book is also a favorite, and it is *"Thinkertoys"* by Michael Michalko.²⁵ We will be using the SCAMPER^{26, 27} thought exercises to point you in new directions using what you uncover with the first set of thought exercises from von Oech.

From these two creative experiments, you will unlock new strategies on how to move forward, help your customers, create sales, solve problems, invent new marketing tactics, or any other challenge you want to push through these filters. In fact, I think you will have so many great ideas you won't know which to start on first.

These are that good.

Go grab a cup of coffee and let's get started!

Breaking Down Mental Locks

In his book, Roger von Oech states that *"the history of discovery is filled with people who's routines were interrupted and were forced to come up with alternative solutions."* ²⁸

I don't think I've ever read a more appropriate quote for how you can move past your crisis and into a better future. It is the idea of alternative solutions that you will be focused on discovering here.

Why? Your world just changed.

How your business worked before, may not be the best way to work in the future. You need to align with solutions that solve the problems as they exist for your customer. ²⁹ Get your Beginner's Mind flowing and be open to new ideas. We want to take a big bite of a new apple.

To start, you need to think differently.

The reason why you filled out the Self-Assessment Worksheet is that we are going to use it to view your answers with different lenses and questions. This section will be focused on developing some new creative ideas.

A good number of them may not be a good fit initially, but when you are brainstorming³⁰ and developing new ideas quite often the answer that works won't appear until you have cycled through a few notions. The process of discovery happens when you create many versions of one answer. That “*A-Ha*” moment might be when you jot down your sixth or seventh thought about something. It usually won't be the first answer that pops out.

Just be playful and open.

Nobody is keeping score or judging you on your answers, so don't get uptight about what you list as potential ideas.

Do the work and have fun. In the following sections, we are going to take the answers that you wrote on the Self Assessment Worksheet and creatively twist them into new ideas.

There are six sections, each with its own Worksheet to complete. For each brainstorming activity below, you will be putting your answers through different mental model filters to produce different creative ideas.

Each of these will be like taking a bite from a different apple. Some may taste better than others.

If you complete them all, you probably will have over one hundred new ideas to choose from in shaping your next normal.

Here are the Worksheet ideas ³¹ that you will be using:

1. **The Right Answer** - Point of view. Imagination. What if the answer you gave was actually wrong? Can you change your focus?
2. **That's Not Logical** - You can't do this because of this. What if you changed the rules?
3. **Follow the Rules** - Let's break stuff. *"Every act of creation is, first of all, an act of deconstruction."* - Pablo Picasso.
4. **What if.** Ask, what if? How would others do it? *"Dogs bark at what they don't understand."*
5. **Play is Frivolous.** Use constraints. What would be a surprise? Restate the problem differently using the idea of creative playtime.
6. **That's Not My Area** - See things through the lens of four new perspectives. The Explorer, Artist, Judge, and Warrior.

The Right Answer

First, you are going to challenge the notion of what is a Right Answer. This could be the notion of what you sell, who your customer is, where you operate, how you operate, or any facts about your business. What if what you thought was the Right Answer was actually wrong?

Use the Self-Assessment Worksheet and the instructions on the following pages to complete this section. Click the button to access the Right Answer Worksheet.

[Get The Right Answer Worksheet](#)

The Right Answer Worksheet

Here we go! Please refer to the Self-Assessment Worksheet to help you fill out the answers to these questions.

Be open to new ideas, and let your playful Beginner's Mind free up the answers to these questions. There are no correct or incorrect answers, so start taking the bite of a few new apples and see how each tastes!

Strengths

What if what you thought was a strength, turned out to be a liability?

For example, let's say that you run a third-generation family business and you have always operated out of the same building. It's a good real estate location. However, it looks like your business is moving online. Could you sell that building for a profit and move to another location to operate your business more economically? ³²

The strength of having a well-known location may not matter as much in the future and could be turned into something better such as operating capital, lower real estate taxes, or a facility that operates more efficiently.

How can you turn those strengths into something new if you view them in a contrarian way like in the example above?

Write down your thoughts on how if your point of view changed, these strengths could be used differently. What would you do? Use bullet points or short sentences and write out several ideas for each of the Strengths you listed on the Self-Assessment worksheet.

Weaknesses

Now that you are familiar with this exercise and technique, use the same mental filter to turn what you thought were weaknesses into viable ideas.

For example, let's say you had to lay off your employees as a way to save money at the onset of your problem. One weakness now could be in hiring the right people, or getting employees back. But what if you could instead automate your business to use fewer employees or none at all? What if you outsourced everything instead? ³³

Review what you listed as Weaknesses on your Self-Assessment worksheet and write a few ideas that could be the opposite of those. How can you turn those weaknesses into something new?

Write down your thoughts on how if your point of view changed, these weaknesses could be used differently. What would you do? Use bullet points or short sentences and write out several ideas for each of the weaknesses you listed on the Self-Assessment page.

Needs

Let's review your list of Needs. Remember, these are the things that you have to have immediately for your business.

What is the opposite of those needs? The right answer may be to handle that immediate Need, but what lives on the other side of that idea?

Here we want to challenge the notion that these needs are real. What if you didn't do them, or rebuilt your business to handle that aspect of your business without that Need? How can you achieve the same result, but without that item?

For example, let's say one of your identified needs was to expand your delivery system for your business by buying or leasing more trucks. Instead, what if you contracted the delivery to a vendor system instead? Both Amazon and FedEx have had success with this model.³⁴ You have fulfilled the task, but didn't spend capital on a fleet of new trucks.

Review each of the Needs on your list and write down your ideas on doing something differently to avoid those Needs.

Wants

Wants are nice-to-have things that usually add some flavor to the mix. While they certainly can be used, they usually are not mandatory for a business.

An example could be participating in a trade show with a booth. Nice to have, and can yield results, but unpredictable for landing any sales. Especially now that many people are practicing social distancing and avoiding crowds.

Instead, what if you challenged the notion of that going to a trade show is the right answer, and built a virtual trade show booth instead? ³⁵ Your entire booth can be set up in an office and using technology, qualified sales prospects are given the show presentation with a scheduled appointment from their computer.

Review each of your Wants on your list and write down your ideas on doing something differently to avoid those Wants.

Your One Thing That You Wish Was Different

On that Self-Assessment Worksheet, you were asked to describe the one thing that you wished was different about your business? What did you write?

Right now, this is your correct answer.

Maybe your wish was that you had more sales. As an example, what's the opposite of that? Zero sales? Just to put everything on the table, have you explored selling your business?

What if the right thing for you right now is to do something entirely different?

What if your company stayed in business, but the focus was on selling, manufacturing, or promoting a new service for something completely new? ³⁶

When we are brainstorming, nothing is off-limits, so explore every possibility.

In this section, work on what you wrote for the one thing you wish was different. What would it look like if you kept that the same, but changed other things like in the example?

Three Positive Things

Using this same “What is the Right Answer” framework, what if the three positive things you listed actually weren’t really positive?

For example, let’s say that you have had very few customer service complaints. This is listed as a positive thing about your company because it indicates that customers are happy. Outstanding! You want fans, not customers. ³⁷

But what if you intentionally tried to get customers to complain more? On purpose. Maybe if in every facet of your business you had more customers pointing out what they didn’t like, you could use that as data to change things to make them better? ³⁸

What if not having customer complaints was actually a liability, as that could indicate that they don’t care enough to actually complain? Or it was too difficult to voice their opinion for one reason or another. Maybe there was too much friction for a customer to actually complain, so they don’t bother, which is the reason why you don’t have many complaints.

In this section take your three positive things and rework them to indicate that they are not what they seem. Uncover a different viewpoint for each and brainstorm on how that could point to potentially a different direction.

Three Negative Things

Of course, this works the other way too. What if the three negative things about your business weren't really negative?

For example, let's say that you have a hard time finding experienced and skilled workers to work at your company. Your management team and HR department absolutely are stumped on what to do and this is limiting your growth in some areas.

Instead, what if that actually was a plus for your company? Instead, what if you marketed that careers are built at your company and went after ambitious people that want a career in the industry, but don't have an experienced background or advanced skills? ³⁹

Now, you will train them. In a short period of time, you can have talented and skilled employees doing the work, but at a labor rate that is lower than a veteran employee with years of experience.

In this section take those three negative things and rethink them into a different viewpoint.

What is the Best Thing That Could Happen To Your Company?

I'm sure you get the drill by now. What if the best thing that could happen to your company actually was completely wrong?

For example, what if you landed a gigantic client? They love what you do and start sending you a massive amount of orders. So much in fact, that it overwhelms the system. You can't keep up, cash dries up while things are in production for it, and the stress level rockets to the moon.

In this scenario, I want you to flip that best thing on its head and outline the dark downside. Whatever you wrote as your answer on the Self-Assessment Worksheet I want you to consider how it is now the wrong thing. Detail why.

What is the Worst Thing That Could Happen To Your Company?

The same goes for this one. On the Self-Assessment Worksheet, you wrote down something completely awful.

Maybe it was that you would file for bankruptcy because of what happened with your crisis. Again, what if that was the best thing? What was seemingly the right answer, trying to avoid bankruptcy, was actually wrong?

Maybe the best thing would be bankruptcy. ⁴⁰ There is a social stigma attached to filing for bankruptcy, and of course, most people want to avoid it at all costs. Chapter 11 is designed for businesses to reorganize and restructure their debts and assets so they can pay back creditors.

What if instead of avoiding this, it was the right thing to do? Again, this is a brainstorming exercise so you should be thinking creatively here. Flip that worst thing into the best thing and see where that thought takes you.

What is the Biggest Problem You Face Right Now?

Again, let's challenge the notion that what you wrote on the Self-Assessment is the right answer.

What if it's not?

For example, let's say you wrote that lack of sales is your biggest problem. While not having sales may be actually true, what if that's not the actual problem? What if it was tied to your marketing, what you sell or how you sell it, or even who you define as your main customer? ⁴¹

While it may seem obvious to you what you feel is your biggest problem, in actuality, it could be hidden from view. Your job is to uncover it. Look at all the detail that you wrote when you first answered the question on the Self-Assessment Worksheet. What if this information wasn't pointing to the right opportunities for the solution?

Use the lens of what's going on in the world today and how different aspects of our lives have changed to rethink your position on this question. Can you rewrite your biggest problem?

What Do You Need to Solve the Problem?

Ok, now that you have just outlined a different scenario, does the solution you identified on the Self-Assessment still hold water? Remember, we're playing devil's advocate here and challenging things.

Your original right answer, may not be valid. Let's articulate a new answer or list of things needed. Simply identify ideas, even if you can't acquire them immediately or need more research. How would you solve your "new" Biggest Problem as outlined in the previous question. Chart it out.

That's Not Logical

In this section, we'll again take those answers you gave on the Self-Assessment Worksheet and spin them on their head with some creative lunacy.

Remember, this is about having fun and being creative! There are no wrong answers, only incomplete unwritten sections on the page.

Don't be that person.

[Don't Be Logical](#)

That's Not Logical

Here's a completely different way to play with your answers. For this one, we want to insert wacky and seemingly crazy ideas into the mix to see what pops out.

For most people, they don't think of creative ideas because of the limits of what they think is logical in their minds.

"You can't do that because of this." 42

However, history has shown us countless times that someone took a seemingly far-fetched idea and built it into something new that everyone craves or uses.

Disposable diapers, the iPad, the telephone, a Post-It-Note, and even the ice cream waffle cone, all came from somewhere.

Strengths

Ok, you have identified a list of strengths. How can you use them in ways that you have never considered? There is an opportunity here. Let's see what we can do.

For example, let's say that your company's marketing department is first-rate. They come up with killer ideas constantly and are experts at web design and branding. What if they were spun off into a new company?

How can you capitalize on something to build a bigger benefit? Take each of the Strengths that you identified and see where your thoughts take you on this. Don't be logical. There are no rules!

Weaknesses

I think you have the idea. Just like with the identified Strengths from the Self-Assessment Worksheet, use the list of Weaknesses to brainstorm on some new ways to change things for the better.

For example, let's say that because of the crisis event, a good chunk of the company has been working from home. What if that was the new normal? Let's pretend there is no office at all. How would you function? What would you need to make it work?

Your job here is to take each of your identified Weaknesses and see if you can conjure up a new point for your company that makes sense. Don't be logical as to how! You simply want to take your lemons and see if you can make some fantastic lemonade out of them.

Needs

This may seem like a difficult one as a Needs list is usually logic-based. After all, that's how the list was made. *"What do we need right now?"*

But here we are dealing with the craziest ideas you can consider. After all, how do you think Uber became one of the largest transportation companies in the world, but actually doesn't employ any of their own drivers?

Your mission here is to jot down your not-logical ways that you can acquire the items on your Needs list. These are going to become the threads that you might be able to pull later to develop new ideas that can lead to greatness. I'm sure someone at Uber said, *"what if we didn't have any employees? How would that work?"* ⁴³

Get some of those same ideas down on paper.

Wants

Look at your Wants list. These are the things that you listed as "Nice-to-haves," but not mandatory. In our That's Not Logical exercise, we want to drill into these with some creativity.

What if you used a metaphor for comparison here? ⁴⁴ A metaphor is a figure of speech in which a word or phrase is applied to an object or action to which it is not literally applicable. Take a few metaphors and compare them to your Wants list. How are they the same? How are they different? Does that spark any ideas you can use?

For example, let's say that on your Wants list is "upgrade to a better CRM (Customer Relationship Management) tool." If we use the metaphor, "Like going fishing," we can come up with several easy to reach ideas of using bait, preparing for the trip, you can't catch fish unless your hook is in the water, and so forth. This might pull up an idea or two that you can implement now, instead of obtaining that Want.

Here are a few metaphors you can try:

- Going fishing
- Putting out a fire
- Doing standup comedy
- Building a house
- Being a parent
- Planting a garden
- Creating art
- Writing a song
- Being a superhero
- Baking a cake

Of course, you can insert your own if you don't like the ones above. Take a few minutes and use a metaphor to develop something That's Not Logical about your Wants.

Describe The One Thing About Your Business That You Wish Was Different

This one might challenge you, as we are accustomed to only think in terms of solving the problem. That's a direct result of the effort of action.

Instead, what if we readdressed what we considered the problem at its very core? To do that, let's consider the notion of Soft and Hard thinking. Hard thinking is very direct, and exists in terms of black and white, right or wrong, on or off. Soft thinking is all the shades of gray, but let's throw in other colors too.

Instead of thinking in terms of the one thing that you wish was different in your business, what if that one thing stayed the same, but your business changed?

For example, your one thing could be *“I wish my sales team consistently hit their sales goals.”* ⁴⁵

Instead, what if your sales team’s results stayed the same, but you achieved more sales by doing something differently? What would you need to do? Maybe shifting your sales to not use a sales team, such as using an online portal or website. ⁴⁶ What if you opened retail locations or pop-up stores? ⁴⁷ Maybe added a subscription service? ⁴⁸

In this section, restate your wish by shifting your approach to the challenge using some softer thinking.

3 Positive Things

On your Self-Assessment Worksheet, you jotted down three ideas that you considered to be Positive things about your company.

In this exercise, let’s see if we can explore ways you can use these that you haven’t considered. Positivity can’t be a secret! Let’s make sure the world knows.

And because this is the “That’s Not Logical” section, we want to think up the craziest ways to highlight these notions. For example, let’s say your company is known for its contributions to non-profit organizations and uses cause marketing to help generate sales. What if you created a podcast or video series highlighting other companies doing the same thing to illuminate the benefits of this in the world? You wouldn’t be selling. This would be 100% storytelling. ⁴⁹

What are your “Not Logical” ways that you can use your positive attributes to help drive your company forward? Brainstorm on these and create a radical list of ideas that you would have never considered a year ago.

3 Negative Things

The same goes for these.

How can you use these negative things about your business to develop a new path forward? While a negative thing certainly can be an opportunity for improvement, it can also be a business opportunity as well.

What are your “That’s Not Logical” ideas for using these negative points to help develop your company?

For example, let’s say that errors, mistakes, and defective products cost your company a lot of money last year. That’s certainly a huge negative. What if you only focused your business on the products or services that had the best quality, and dropped the products that had these increased error costs? ⁵⁰ Or what if you partnered with another company and outsourced the work to gain quality improvements?

Remember, we are listing ideas that before you would have never considered.

What's The Best Thing That Could Happen To Your Company?

In the "That's Not Logical" context, are you dreaming big enough? Whatever you wrote on the Self-Assessment, let's double it, or maximize it in a way that you haven't considered.

However, when you wrote your original assessment you were doing so within the constraints of the way you are used to thinking. Now, we want to expand that idea with some force multipliers.

Be illogical here. We're in the creative phase of thinking through the challenges. Later, after we've sorted everything that was written, we'll start worrying about the practicality of the ideas and how to build them.

Remember, as Seth Godin says, *"You get what you focus on."* 51

Right now? Jot down some of the biggest, brightest, and most fantastic ideas that you can dream up for your business. Expansion? New products? New sales channels? Staffing? Financial safety and growth?

Nothing is too big here. Own the world.

What's The Worst Thing That Could Happen To Your Company?

Yep, now we are going to work on some worst-case scenarios. Whatever you wrote before was too timid.

Now, we are in the realm of "That's Not Logical." Recovery means we need to consider new options. This is the reason why we are looking at this question this way now.

Control is and always will be an illusion. People will take more risks to avoid a loss than to realize a gain.⁵² What are you afraid of losing with your attempt to remain in control?

You never had it, and you won't in the future either. But, we can prepare how we respond to future situations. But first, let's list some absolutely awful things that could happen. This may help you prepare by doing something now to avoid or mitigate the situation later.

Take a minute to list a few far worst-case scenarios that you have ever thought about. This is not about being paranoid, this is about being prepared.

What's The Biggest Problem You Face Right Now?

We need to solve this one. Going back to using a metaphor as a lens to solve a problem, let's see how we can take a different approach to come up with a new solution.

For example, let's say that your biggest problem currently is a lack of sales. I'm sure a lot of businesses are facing that situation. How can you use the metaphor, "*Like baking a cake*" to help think up some solutions? Here are a few:

- A cake uses a recipe, which is basically a process. If you follow the recipe, you get a delicious cake. If you don't? The birthday party is ruined. The same goes for the sales process. Take some time and chart out your sales "recipe" to ensure consistent results.⁵³
- Baking uses ingredients in the recipe. What if you switch out or change the ingredients? One type of chocolate over another, some food coloring, or maybe adding coconut to the icing? It becomes a different cake. What ingredients do you have in your sales "recipe" that you could switch out? What happens if you do?
- When baking a cake, you start with the end in mind. There is a vision and goal you want, so you can choose the right cake pans, amount of ingredients, and other items. For sales, if we start with the end in mind with goals, we can work backward from there to build benchmarks for progress, and also the systems to achieve them.

Use a metaphor to reframe your biggest problem and write down your similarities. There is a starter list of ten metaphors to use in the Wants section above. Feel free to use your own if you like another metaphor better.

What Do You Need To Solve This Problem?

Using the metaphor exercise above, what new solutions did you identify? Also, did you try a different metaphor to see if new or better ideas would appear?

Don't be satisfied with only one answer here if you don't feel it is enough. Keep working on the problem.

Then, like a gardener, it's time to trim and harvest the ideas. Weed out the ones that aren't right.

For an idea that looks promising, that isn't developed enough, give that idea some air, water, and sunlight so it can grow. If you happened upon a new idea, what do you need to make that work?

What we are looking for here are ideas you can use. Create a checklist of actionable items for anything that looks promising.

Follow The Rules

Rules are set up as guidelines to help everyone in a standardized fashion. You know this because you have been following the rules your entire life. It is the way the world works.

This section is about breaking the rules. Pablo Picasso once said, *“Every act of creation is, first of all, an act of deconstruction.”*

The idea here is that there are several ways to solve the problem.

Roger von Oech wrote, *“Think about it: almost every advance in art, medicine, agriculture, engineering, marketing, communications, education, politics, and design has occurred when someone challenged the rules and tried another approach.”*

Every new product or breakthrough somehow somehow didn't follow the rules that were established before them. That's why they were revolutionary ideas.

Rules are limiting. We want to be limitless in our thinking.

Imagine a maze before you. On the maze are points A & B. A is the entrance to the maze, and B is the exit. If I asked you to connect the two points, what would you do?

Would you start at A and wind your way to B, constantly starting and stopping, and backtracking your way until you solved the problem?

Would you start at B and wind your way to A, as obviously working backward through the maze is the easiest way to solve the problem?

Would you draw a straight line from A to B, ignoring the walls of the maze? Maybe draw a line outside of the maze and circle around from A to B instead?

Follow The Rules

What we want to know is "*What rules can we break?*" There is a new normal after you start your road to recovery. A shift has occurred. This is a business opportunity for you.

Using the answers from the Self-Assessment Worksheet, let's take a look at the rules associated with your answers and discover if there are any opportunities we can take advantage of in this new time.

[Start Breaking Some Rules](#)

Strengths

Again we are taking the same responses that you outlined originally and rework them. In this exercise, take the strengths you have identified and write out a few rules for each of these. How does your company or industry see these strengths?

Are there standard rules that you can break? How does your customer value these strengths?

List your industry or company rules about your Strengths and how you could spin them into something new. This could be in a new process, product, service, feature, or benefit.

Don't be normal!

Weaknesses

For your company's weaknesses, let's explore the rule breaking options here too. Take the weaknesses that you have identified and write out examples of the rules for each of these. How does your company or industry view these weaknesses?

What could you do differently that could turn these weaknesses into something new? How would your customer or market value a different idea?

List your industry or company rules about your weaknesses and think about how if you created something new it would develop into a new opportunity for your business. Channel this through the lens of a new process, product, service, feature, or benefit.

There are no wrong answers!

Needs

On the Self-Assessment you listed three immediate needs. These are basically mandatory items that you need now to survive. What are the rules or standards regarding each of these?

Like in the example of the maze, sometimes you can connect A and B by drawing a path around the maze or directly through it. What are the non-obvious ways you can get your Needs handled? Bend those rules! Invent something different.

Write out the old rules for each of the Needs you listed, and next to them brainstorm on some new ways that you can solve for each Need.

Wants

These, of course, work the same way. Wants are the “nice-to-haves” for a company. You listed three. What are the rules or standards regarding each of these? Jot them down.

Now, how can you break these rules or go around them? Get creative and have some fun.

Write out the old rules for each of the Wants you listed, and next to them list your creative ways that you can acquire your Wants with a new idea.

Describe The One Thing About Your Business That You Wish Was Different

Old rules apply here more than ever. For your one wish, what are the rules or standards that give that challenge some structure? There is a reason why you wrote down your wish.

What if it was different? Remember in our maze analogy we could simply draw a straight line from point A to point B, going directly through the maze walls.

Where are your maze walls with your wish? What are the constraints that you are dealing with that makes this point such a challenge that you want to change it?

For this segment, list the rules and boundaries that exist for your one wish and then start listing creative ways you can go around, through, or tear down those walls.

3 Positive Things

In the Self-Assessment you listed 3 Positive Things about your business. These are certainly things to be proud of and to keep intact.

But what if we could make them even better and have more impact?

Again, what are the rules or standards that make the 3 Positive Things work?

Think about it.

You listed these for a reason. Now, let's dissect them a little bit and see if you can get clarity on how they tick.

List the rules for your 3 Positive Things that make them work, and then see if you can list some creative ways that bend those rules to make these positive attributes even better. What might happen if the rules changed? Would Strengths still be as valuable?

What could you do?

3 Negative Things

The same goes for the 3 Negative Things. These were listed for a reason. What are the rules or standards that created these points? Are they opinions or based on facts?

Get to the bottom of why these items are considered negative. There was a mental process at play here that allowed you to list them as negative. Write out those rules. We want to comprehend and understand them better with close examination.

List the rules or standards for the 3 Negative Things, and jot down your thoughts on using these rules to avoid the Negative challenges in the future. What if the rules changed? Would these still be viewed as Negative?

What could you do differently?

What's The Best Thing That Could Happen To Your Company?

You know the drill. Why did you state your answer for this question? What were the rules or mental standards that framed this as your answer?

The reason we want to explore this now is that expanding your mental framework for how you are viewing this situation can possibly lead to a better answer. Your answer may not be wrong, but it could be incomplete.

Why did you answer it as the “best” thing? Jot down your reasoning. What were the mental rules that you used to define that as the answer? What if those rules didn't exist or were different? Would your answer be the same?

Think about how your answer might be different if we change one component in the equation.

What if your money, time, people, customers, location, communication, marketing, or leadership was different for your company?

Take some time and write down the rules for answering this question, and explore the possibility of how a different mental framework could alter what you consider the “best thing to happen to your company.”

What’s The Worst Thing That Could Happen To Your Company?

The same goes for this one. Why did you state your answer to this question? What are the rules or mental standards that framed your answer to this question?

Our goal here isn’t to make this worse by some doom and gloom exercise. No, the goal is make sure you are comprehending exactly what might happen and build safeguards to protect your business from venturing down the wrong path.

Let’s use the same mental challenge posed in the last question. What if your money, time, people, customers, location, communication, marketing, or leadership was different for your company?

Would the rules be the same for listing this as the “worst case scenario” for your business? Maybe one of those mental filters listed above could point you in the right direction to head a problem off at the pass.

What if your company installed new rules?

List the rules for answering this question on why you stated that something was the worst thing, and jot down some ideas on what might have to change to prevent that from happening.

What's The Biggest Problem You Face Right Now?

Again, let's look at why you chose your answer with your mental framework. Why did you list it as the biggest problem?

Do your employees, suppliers or customers consider it the biggest problem? Let's unpack why you stated that it was the biggest problem. It may well be a gigantic challenge, we are not arguing that, but we want to get into the "why" behind your answer to see if we can use that and create a solution or new opportunity.

Remember, *"What rules can we break?"*

You don't have to "do things the way you have always done them." If there ever was a time for creating a new way of working in the history of business, it is exactly now.

Write down exactly why you stated that your challenge was your answer.

Then using the framework of "What rules can we break," list a few brainstorming ideas on solving that problem. Don't worry about the practicality of your ideas. Just fire them off and list them.

What Do You Need To Solve This Problem?

Exactly. Your original answer to this question may seem a little stunted now.

Now is the time to expand your answer, especially with the new “What rules can we break” mental framework.

Maybe a different set of rules may produce a different result?

Make a checklist of things you are going to need. This can include research, talking to different people, financial or legal help, website development, new marketing or business plans, and so forth.

What If

I have to admit, this part of this chapter has always been my favorite way of stirring up new ideas. To me, it's the most creative.

Roger von Oech writes, "*...since our thinking is not bound by real-world constraints, we can generate ideas that have no correlate in the world of experience.*"

We do this with a simple two-word phrase, "What if."

It is very powerful, especially in the realm of problem solving or creative thinking. All too often, we get caught up in the practicality of making something happen, so the initial answers are limited. Money, time, experience, skill, resources, and other real-world constraints govern the range of ideas.

A "What if" sentence can challenge those.

- *What if a customer subscribed to your business?"*
- *What if we need new core competencies?"*
- *"What if what your customer valued wasn't based on money?"* 54
- *"What if you looked at the problem from someone else's point of view?"*
- *"What if you partnered with a competitor?"*
- *"What if how people worked in your company changed?"*
- *"What if nobody had to travel?"*
- *"What if a customer sold for you?"*
- *"What if price was no object?"*

- *“What if it was customizable for personal experience?”*
- *“What if you didn’t have employees?”*

You can filter a lot through the notion of a “What if” sentence. But one thing to be wary of is looking at your “What If” results with a negative lens. Most people when encountering a new idea, instantly start dissecting it for the impractical reasons why it won’t work.

Instead, when we start evaluating ideas let’s focus on the best features. We want to take the positive, most useful, and attractive elements and see what we can do to make them functional later.

Remember, we want to bite that apple like it was the first time eating one.

Finally, another fun tip when brainstorming is what we’ll call the “Replacement Strategy.”

If you are talking about these with your team or other people and someone doesn’t like an idea, their job isn’t simply to dismiss the idea outright. They have to replace it with something better or add on to it.

“I don’t like that, but what if we did this?”

Are you ready to unleash the power of “What if?”

Again, we are using the answers you provided in the Self-Assessment and smashing them through the “What If” filter. Use the ten “What if” statements above, or substitute your own, to review your Self-Assessment answers and come up with some new ideas.

What If

Are you ready to unleash the power of "What If?"

Again, we are using the answers you provided from the Self-Assessment Worksheet and smashing through the "What If" filter. Use the ten "What If" statements above, or substitute your own, to review your Self-Assessment Worksheet answers and come up with some new ideas.

[Unleash the Power of What If](#)

Strengths

The strengths that you identified on your Self-Assessment are now going to be subject to a new interpretation using the lens of “What If.” Feel free to substitute your own, but start brainstorming how your business Strengths might change based on one or more of the ten “What If” statements.

For example, let’s say your business primarily has a retail location. But now, using the *“What if nobody had to travel”* statement, how would your business change when more people than ever before are going to be shopping online or from an app on their phone?

Take that idea and see if you can reinterpret how your business would work for the Strengths you have listed with the “What If” idea. What would need to change?

Don’t worry about the practicality of these, just spin up new ideas and see what you can discover.

Weaknesses

You have identified a few Weaknesses in your business, and that’s great. It’s good to know and understand the opportunity for improvement.

But with the “What if” filter going full-tilt bozo, we want to see how these weaknesses might change. Will they still be a weakness, or maybe create a new opportunity we can explore later?

Let's use the *"What if you partnered with a competitor?"* as a place to start.

Maybe they are in the same boat. Taking a look at what's left of the two businesses a merger might make sense. If that doesn't work, what about an agreement to pool or share resources? What else could you do with that idea?

Take your listed Weaknesses from the Self-Assessment worksheet and choose one or more of the "What if" statements and see if you can uncover something that will help for each one.

Needs

Needs are things that we need to act on immediately. You listed these on the Self-Assessment, and for the part of the worksheet we will be running them through the "What If" filter.

For example, let's say that you have identified that you need to update your website immediately in order to capture more online sales. This is going to be a crucial part of your business going forward, as more customers are scrambling to handle business online.

In this case, let's use the *"What if you looked at the problem from someone else's point of view"* as the filter for this Need.

For this work, it is obvious to use the customer's point of view as a new perspective. What do they want in a website? How are they using it? Could you build a better and more frictionless experience for someone to shop and use the website? What if every tiny detail was focused 100% on the customer's perspective, rather than what was necessarily how your company might build or show something?

You would probably make different decisions, right?

For your Needs, choose one or more of the "What If" statements and see if you can uncover some new ideas that would work for your business.

Wants

Again, these are the "nice-to-have" items that are important, but not mandatory. Just like with the Needs list above, we want to interpret these Wants with the "What if" filter and see what we can uncover.

For example, let's say that you have listed a better marketing plan as one of your Wants. It might be a Need, but in this case, it's not a top priority given what is going on in the world.

Here we'll use the *"What if a customer sold for you?"* as the "What If" lens for discussion.

How could you get more referrals? In order to get more referrals, you have to first be referable. What do you need to change to do that? Are you asking for referrals? Is there software you can use? What about Google ratings or testimonials?

Use one or more “What if” statements to refine your Wants and see if you can discover any new possibilities that will benefit your company.

Describe The One Thing About Your Business That You Wish Was Different

What did you write for this one on the Self-Assessment? It is going to be very interesting to see what changes with the “What If” filter added.

For example, let’s say that you wrote that you wished that sales were not so much like a roller coaster with seasonal swings.⁵⁵ It is feast or famine. Reviewing the ten provided “What If” choices which one leaps out?

“What if a customer subscribed to your business?”

Building a steady stream of monthly repeat sales that are delivered on a schedule just might be the trick.⁵⁶ What could you do with that? Do you have an existing product that might make sense? Would you have to develop one? What if you didn’t ship a product at all, but developed content instead that was delivered online like a “how-to” series or podcast?

In this section, take the One Wish idea that you described in the Self-Assessment and use one or more of the “What If” statements to see if you can identify a new solution for your business.

3 Positive Things

Your three positive things are probably the secret rocket sauce that keeps your business going. We certainly don't want to change that. But what if we can amplify them?

For example, let's say that you listed “customer loyalty” as one of the three positive things that you currently have going for your business. You have worked hard over the years to develop that and keep your customers happy. During these trying times, they are sticking with you. That's great.

Looking over the “What If” statements, let's choose *“What if what your customer valued wasn't based on money?”* and see where that takes us.

Remember, nobody wants to be sold...but plenty of people want to buy. One of the reasons that people purchase anything is because they have an emotional connection or want to belong to a group. That sense of Tribe is important. Using this “What If” statement could you develop a program that feeds into that sense of belonging and customer loyalty and create something to spark that within your customer base?

Take each of your 3 Positive Things and use one or more of the “What If” statements and explore new ways to express these positive notions for your company.

3 Negative Things

Nobody likes to dwell on negativity. But we can use what you wrote in the Self-Assessment worksheet as a starting point for the opportunity to change things for the better with the filter of the “What If” statement.

For example, let’s say that one of your negative things was that the cost of labor has skyrocketed in your area lately. Not only that but finding skilled workers has become almost impossible without overpaying for what the actual job is worth. Sorting through the “What If” statements, let’s use the *“What if you didn’t have employees”* as a place to start.

It may seem ludicrous to have a company without employees, but it is possible. General contractors build houses or buildings all the time without having electricians, plumbers, roofers, or carpenters on the payroll. They simply outsource this work to other businesses. Could you do that? What would it take? Or instead of people, is there some software that could do the work for you with some automation?

Use one or more of the “What If” statements and design new ways to counteract each of the 3 Negative Things from your original Self-Assessment Worksheet.

What’s The Best Thing That Could Happen To Your Company?

This may seem like a dream, but what if it was a goal? Let's take a few of the "What If" statements and see if we can churn up an idea or two to turn it into a reality.

For example, let's say that you wrote: "grow sales to the point that we could expand into another location." Seems doable.

For this one let's use *"What if the price was no object?"* as the place to start. What's that mean? Does it mean what if your customer base was the wrong one? Maybe instead, what if you focused on serving a higher level of customer that was more profitable?

What would it take to work half as hard for twice as much?

I know you have seen people offering products or services similar to what you do but at a much more elevated price point. What if you researched and explored what it would take to focus on that type of customer instead? Focus on bottom-line profitability, not top-line sales.

Take one or more of the "What If" statements and determine if they can help you land upon an idea to make that "Best thing that could happen to your company" a reality.

What's The Worst Thing That Could Happen To Your Company?

Whatever happens, we certainly want to avoid whatever you wrote on your Self-Assessment worksheet. That's why we are going through these mental exercises to ensure that all sides of the problem and potential solutions are recognized.

Planning is anticipatory decision making. So if we know what to avoid and how to avoid it, the chances of that "Worst Thing" happening are slimmer.

Using the "What If" framework, let's explore what you wrote on the Self-Assessment worksheet. For this example, let's pretend that you wrote: *"that you don't want to run out of money before you can get your business back on track."* That certainly is a fear that a lot of businesses probably share right now. Let's try *"What if how people worked in your company changed"* as the filter to start our thought experiment.

Traditionally many companies have grown used to having a "place of business" to actually reside and do the work. One idea from the coronavirus pandemic gave us the perspective that it is possible to work in untraditional ways. The hours that we work changed. More people relied on technology for communication and online meetings. How much money could businesses save if the traditional office space didn't exist? What would it take to shift that idea into reality? Would it work for your business?

Use the "What If" framework to shift how you think about the "Worst Case" scenario that you outlined in the Self-Assessment Worksheet. What can you discover?

What's The Biggest Problem You Face Right Now?

It may seem gigantic. But, we want to break it down and solve it.

Let's use that "What If" framework to explore a different approach. Here, let's take a look at "*What if it was customizable for a personal experience.*" In your business, you rely on customers to come to your location and buy. Selling online is difficult due to your product.

Instead, what if you pivoted to a completely customizable and intimate personal experience for your customers? Everything you do is tailored to their choices. You are not selling at a commodity level, as the value is in the personal experience and working with an expert. ⁵⁷

Use the "What If" framework to rethink your biggest problem you face and see if you can unlock a solution or two that will push you into a new direction. Where will you go?

What Do You Need To Solve This Problem?

Again, "What If" to the rescue!

You know what your problem is, as you have listed it. For this last one, let's use the "What If" filter, "*What if we need new core competencies?*"

For example, previously people learned by attending school. Being on campus was a mandatory part of learning. Now, millions of people of all ages just learned that they can acquire knowledge from home with e-learning. Think about how that dynamic will change education systems and the way people learn from now on. Teachers are going to have to learn how to conduct a class via technology, rather than in-person. New software and IT infrastructure will need to improve.

Here, if we use the “What If” framework for your problem, what new ideas will you need to acquire to solve your problem? Remember, you don’t have to actually have the solution. Just list what you need.

Play Is Frivolous

How often do you actually play around with ideas? When we were children, it was natural to use our imaginations and creativity. As adults, this gets watered down and diluted until new ideas never form because we don't take the time to play.

Roger von Oech states that *"playful attitude is fundamental to creative thinking."* New ideas don't happen because we are worried about what other people might think.

But when our defenses are down and we are left to dream the magic dream, anything can happen. Right now, your business needs a new direction. It may be a necessity to survive.

In his book, he concludes that *"necessity may be the mother of invention, but play is certainly the father."* In this section, you will again use your answers from the Self Assessment worksheet, but inject some youthful playfulness into dreaming up some new answers or solutions.

Don't think you can play with what you have? Consider this. In 1960, Charles Piccirillo created this ad to promote National Library Week. The headline was amazingly simple but powerful.

abcdefghijklmnopqrstuvwxyz

In the ad, Piccirillo demonstrates that using these same letters, great authors played around and created their most famous works. Mark Twain. Shakespeare. James Joyce. All using the same resource, the alphabet.

It is the willingness to play around with the resources that matter. How often are you playing around with your business? Three guesses as to what we are going to focus on next.

But to help you here we are going to introduce something to help with your ability to play. After all, we want to use the answers you gave in the Self-Assessment and come up with some new ideas.

For this let's use the idea of a "Constraint."

A constraint is something that limits. It's a rule, but it can help us brainstorm new ideas quickly.

For example, years ago I was an art director for a large apparel decorating company. One way that I was able to constantly create new and innovative designs for clients was to invent some new constraints to keep ideas flowing.

I would write words on index cards and keep them in a stack with a rubber band. Examples of some of the words were transparent, circle, asymmetrical, orange, rough, shiny, glow, or tall. There were hundreds in the stack. When I needed inspiration, I would pull out two or three random cards and use these to filter my ideas for the project. If I didn't like the word, I put it back and draw another one.

We are going to use constraints in a similar fashion here. Here are a dozen for you to choose from:

- Time Limits
- Color
- Money
- Technology
- Size
- Number
- Alphabet Letter
- Increase or Decrease
- Surprise
- Physical Activity
- Visible or Invisible

We will use these constraints and marry them to your answers from the Self-Assessment Worksheet to push out new ideas with play. For this exercise, be sure that you don't have any walls or limits on your creativity.

Have fun with this!

Here's a quote to get you in the mood from the American artist Jasper Johns, *"It's simple, you just take something, and then you do something to it, and then you do something else to it. Keep doing this and pretty soon you've got something."*

Play Is Frivolous

Use the provided Constraints, or invent your own, to invent new ideas and directions for your answers from the Self-Assessment Worksheet.

Remember, play is fun! Unlock your hidden child and write down everything that comes to mind.

[Start Playing](#)

Strengths

Let's play around with your Strengths. You listed three of these on your Self Assessment Worksheet. What can you do with these?

To get our brain working, let's use one of the constraints listed to start up our creative engine. For example, let's say that one of your Strengths you listed was that your business has a large social media following. That's great! Let's wake those customers up and get them to engage with you.

Here, let's pick the constraint "*Alphabet Letter.*" For this one, choose one letter of the alphabet and see how many ideas you can list to activate customers to engage with your business.

Randomly, I chose the letter "P." Here are ten results:

- Podcast - we would create a new podcast highlighting customer stories of success.
- Performance - we act out favorite scenes from movies and post on social media.
- Putting Green - on social media we get people to show themselves putting a golf ball into a cup in their house.
- Pickles - how many pickles are there in a gigantic jar? Guess online.
- Pack - we ask the question - "What would you pack for your ultimate vacation?"
- Philanthropy - we'll donate to your favorite charity.
- Picture - share a photo of you with our product.

- Partner - show off your partner!
- Perfect - what do you consider perfect?
- Poll - answer this survey question

Using one Constraint from the list, play around with the Strengths on your list, and see if you can drum up some new ideas that can elevate them to another level.

Weaknesses

Again, you chose three Weaknesses for your company on the Self Assessment Worksheet. Let's see if we can turn these around using some playfulness and creativity.

In this example, let's pretend that one of your stated Weaknesses was that your business relies on face to face meetings to sell. Right now, it's difficult to handle these meetings due to the current limitations of physical meetings.

Good thing we are going to play around with that Weakness! The obvious Constraint to choose from the list is "*Technology*." Now more than ever before have people started using video meetings to engage with customers, fans, teams, employees, and even friends.

How are you using this in your business? What is the right tool for you to use for a frictionless process that aligns with your brand? How can you make it easier for your customers to adopt a new way of meeting? What are the limitations? How do you schedule or qualify a potential customer for a video meeting?

Using one Constraint from the list, play around with the Weaknesses on your list, and see if you can find a new solution to the challenge posed by it.

Needs

Right now your business has immediate Needs that must be met. These are mandatory items that you have to solve to thrive. Using the ability to creatively play and a Constraint, let's drum up a different way of solving these.

For example, one obvious need maybe a financial injection of cash to help get your business going. Cash is king after all. Maybe your business has traditionally sold a physical product, both online and with a retail setting.

Let's play around with that and choose the Constraint "*Color*" as the variable. What color does the product most often come in? What if it was sold in a limited edition in hot pink or camouflage? For what you do, what would be playful and different? Would there be a market for that?

Think about it. A few years ago, there was a contest for M&Ms candy where you had to find a gray one to win a million-dollar prize. They routinely change colors and tweak their marketing to promote the candy with different ideas based on color. New colors can mean fun and innovative. It's still basically the same product.

Brainstorm and discover how you can tweak your Needs into a new direction using a playful idea combined with a Constraint from the list.

Wants

Wants are those things that probably are needed, but aren't mandatory at the moment.

For example, it would be nice to have television stations, newspapers, and magazines detailing what's happening with your company. But without hiring a public relations firm and positioning your company in the press, that's going to be in the Wants list, not the Needs list.

But, let's use that example with our playful Constraint list. For this one, let's pick *"Surprise."*

The mainstream press is always on the lookout for things that are new and innovative. What are you doing that would surprise people? Is it making a difference in people's lives? What every day problem is it solving?

Couple that idea with what media outlets normally cover this aspect. Reach out to them and pitch your story! Send the info and a press release. Film a video explaining what you are doing. If you want more news coverage you have to be newsworthy. Get your "Surprise" locked down.

Apply your creativity, and link the items in your Wants list with one of the Constraints from the supplied list to develop new ideas you can use.

Describe The One Thing About Your Business That You Wish Was Different

You got this one.

Let's creatively make this change happen with this exercise! Use one of the Constraints from the list and think through how you can solve the challenge.

For example, let's say that due to the recent coronavirus event, your business has suffered because people don't feel comfortable coming back to your space. Your wish was that people felt comfortable again. Let's choose the "*Visible or Invisible*" Constraint and see where this takes us.

The coronavirus is invisible. Even with wearing the PPE face masks and gloves, people may not feel comfortable in your business as they don't trust that they won't get infected by the virus.

Trust is the issue.

What would make customers trust you more? Can you prove that you care with crews constantly cleaning? Are they wearing PPE equipment too? Can you check temperatures with forehead thermometers? What about limiting the number of people inside and the direction they travel? This is filmed and is shown on social media and websites. The more visible that you show concern about your customer's health and safety, the more trust you can develop.

Brainstorm, and apply the idea of what you wished was different, with one of the Constraints to develop new ideas you can implement.

3 Positive Things

This one will be fun. You listed three positive things about your business on the Self-Assessment Worksheet.

We want to take those and apply some magic dust to them to make them even better. For example, let's say that one of your three positive things was that your company has seen some changes in how customers are shopping in your industry.

Let's use the Constraint of "*Increase or Decrease*" to take a look at this idea. From this, we can ask some basic questions.

- Will spending patterns change?
- Will customers buy in bigger quantities, or want more variety?
- Will there be pent-up demand due to the Shelter in Place restrictions?
- Will customers buy through the same sales channels?
- Did one of your competitors go out of business?
- Will things go back to "normal?"

For each of the three positive things you wrote on the Self Assessment worksheet, play around with the idea using one of the Constraints and see if you can dislodge a new way of seeing your market. Crystal ball time! What will your sector of the market look like?

3 Negative Things

Just like with the positive ideas, we want to explore the three negative aspects of your business from the Self-Assessment Worksheet. Let's get those out and wrestle them to the ground with some new thinking.

For your company, let's say that you feel that the senior leadership team is out of touch with the market. They are not in alignment with the way customers think or act. That's certainly a negative and needs to be addressed.

For this example, let's choose "*Physical Activity*" as the Constraint. One reason that they may be out of touch is that they no longer are involved in the day to day operations of what happens in the business. They are seeing things through the lens of KPIs, Dashboards, P&L Statements...but not the actual work involved.

Like the television show "Undercover Boss," it's time for the team to get reacquainted with how the company ticks by spending some time in different areas understanding the daily challenges. It's a way to obtain clarity and insight that you might not have from the corner office. For Lean practitioners, this is the tried and true "Gemba Walk." 58 Go, Look, See is one of the five guiding daily principles practiced by Lean manufacturers to help build continuous improvement.

For each of the three negative things you wrote on the Self-Assessment Worksheet, use one or more of the Constraints listed and see if you can channel some ideas for improvement.

What's The Best Thing That Could Happen To Your Company?

Let's make it better! Nothing is off-limits when we are playing around.

What did you write as your best thing? Maybe you jotted down something like, "*All of my competition goes away.*" I'm sure that is a dream for many business owners everywhere.

Let's say for the sake of argument that your main competition calls it quits. Now what?

Insert play and a Constraint into the framework for the answer. Here, let's use the constraint of a "*Number*" to help define our answer.

- How many customers and orders could we see as an increase? Do we want all of this?
- Will the orders that may be available profitable and in alignment with our financial goals?
- What is the frequency of customer purchases? Does this marry to our peak times for sales, or during the valleys instead? 59
- How many of their employees might be looking for a new position?
- How much of their equipment may be available for sale at a bargain price?
- How much inventory do they have on hand? Do we want all of it?

Noodle around with that “Best Thing” idea with one of the Constraints and see if you can build out an interesting scenario for you to explore.

What’s The Worst Thing That Could Happen To Your Company?

Oof. We are back to this one. Not to be a Debbie Downer here, but let’s use this same technique and explore some playful ways we can either prevent what you wrote or minimize it.

Maybe you simply wrote, “*Financial Ruin*,” or something similar to this for the answer on your Self-Assessment Worksheet. Nobody wants that.

But with this exercise, let’s explore and see what we can do if we are using our head for more than holding up a hat. The Constraint we are using is “*Size*.”

As in, the size of the business. Maybe one of the things you look at is the ratio of an employee to top-line sales. Before, this could be expressed as 1:\$100,000, meaning that there is one employee for every \$100,000 in sales.

But now, you may want to operate a little leaner. More automation, software, and outsourcing...less payroll. The new ratio could be 1:\$150,000.

So the question for you to play around with is how your team is going to accomplish more with a smaller team? As sales increase, you can hire more staff, but it will use the new ratio to help make that decision.

Using some creative play and any one of the listed Constraints, detail how you can either avoid or mitigate the worst thing that could happen to your company.

What's The Biggest Problem You Face Right Now?

We are back to this one. Your biggest problem. With everything going on does it seem too daunting to solve?

That's why we are spending time at play. Don't think like you always do, start with some wacky ideas that aren't logical. Remember, we are toying with new ideas here. You were a kid once, right?

Let's say your biggest problem is that your company is being evicted from your space, as the company that owns the building sold it and the new landlord has plans that don't include your business.

Ouch.

Besides shopping around for a new space, what are some other options? Let's play with that and use the Constraint "*Time Limits*" to see what we can come up with here.

What other businesses have a presence with limited time? Pop-up stores. Food trucks. Kiosks at the mall or a sporting event. Hot dog stands at the park or zoo. Festivals and 5k Races. Online training webinars. Gourmet chefs that cook in other people's homes.

Maybe you could rewrite your business to not operate in a traditional permanent space, but one with more flexibility and geographic agility? What could you do? What would you need?

Use the idea of play and one of the listed Constraints to see if you can invent a new idea to solve your biggest problem. Here's one that you may want to try a few times and see what you can discover.

What Do You Need To Solve This Problem?

If we are playing around and using funky ideas to generate creative solutions, then let's take a stab at listing out what we may need to solve the problem that you listed on the Self-Assessment Worksheet.

What did you write? Maybe you even liked what you wrote above in the last exercise.

For this last one in this section, let's use that playfulness and the last Constraint on our list, "*Money*" to see what we can drum up.

Access to cash is a problem that many businesses face. For this exercise, let's use that constraint and jot down how your business uses or needs money.

- Access to your business line of credit
- Credit cards
- Partnerships with another company
- Investors for your business
- Bank Loans
- Governmental loans that are available to you for the rebound
- Anything that you can sell. Old equipment, property, inventory, or items not in use.
- Pre-sell. Book the orders now, get the cash, ship when ready.

I personally know of someone who sold their new Tesla to help bankroll a new start-up business. They bought a new car, but it was a different make and model and the monetary difference was the working capital they needed to fund the company and get it off the ground. They aren't walking and they have a new company. Smart.

Take some time and list out playful ideas on how you can solve your biggest problem. Use one of the listed Constraints to help you focus your thoughts on solutions.

That's Not My Area

These days everyone is an expert at something. I know you are. We come to think of a particular problem, and it is solved in two seconds because we know so much about it. In many businesses, the challenge for finding your way out of a situation or developing new ideas is locked down into the notion of specialization.

"Sorry, but that's not my area." we say. Then the thinking simply comes to a dead halt.

That is a management problem. Sorry, you need to get accounting involved. Nope, you need to call marketing.

But are they really that specialized?

Think about how communication, information, culture, behavior, financial, and other problems exist, but overlap into other areas. We can all solve these with some common sense and maybe some tools to use.

Sometimes all it takes is to see things with a fresh perspective and a new set of eyes.

Thomas Edison famously brought in teams of people with completely different backgrounds to help solve problems. Plumbers worked with electricians and engineers. He wanted the cross-fertilization of ideas to help unravel the mysteries of how to solve the problem.

"I haven't failed, I've just found 10,000 ways that won't work." he said. But he wasn't doing the work. The teams he assembled were the ones trying out new ideas.

Fresh perspective.

Edison also said, *"Make it a point to keep on the lookout for novel and interesting ideas that others have used successfully. Your idea has to be original only in its adaptation to the problem you are currently working on."*

But when you start poking around for fresh ideas, be warned that you can sometimes discover the unexpected. Edison knew that is where the magic happens.

How many times have you discovered the answer to something while looking up something else? This has happened to me countless times over the years.

From Von Oech: *"There's one other important thing to remember when seeking the obvious, and it's highlighted in the following story.*

"It seems that Sherlock Holmes and Dr. Watson went on a camping trip. They pitched their tent under the stars and went to sleep.

In the middle of the night, Holmes awakened and exclaimed, "Watson, look up and tell me what you deduce." Watson opened his eyes, and said, "I see billions and billions of stars. It's likely that some of the stars have planetary systems. Furthermore, I deduce that there is probably oxygen on some of these planets, and it's possible that life has developed on a few of them. Is that what you see?"

“Holmes replied, “No, you idiot. Somebody stole our tent!”

The moral of that story is sometimes you have to be on the lookout for things that are not present. Like a tent.

It's easy to get caught up in the hunt for the new idea, but maybe something is missing from what you need now.

In this exercise, we'll take your answers from the Self-Assessment Worksheet and look at them from a fresh perspective. In this case, let's unlock some mental flexibility. Edison had a team, and so will you.

Your team will consist of an Explorer, an Artist, a Judge, and a Warrior.

- The **Explorer** searches for new ideas, information, and resources. How would an Explorer view something?
- The **Artist** turns resources into ideas. The Artist creates. What will excite the Artist best?
- The **Judge** evaluates and decides. Does the Judge have enough information to make a good decision? What's needed?
- The **Warrior** carries ideas into action. How can the Warrior make something operational? What's needed from a tactical side?

That's Not My Area

Gain new perspective from your old answers from the Self-Assessment Worksheet by viewing them from how the Explorer, Artist, Judge, or Warrior sees them.

What new ideas or discoveries will you make by changing perspective? For best results, pretend you are each of these different people.

[Gain New Perspectives](#)

Strength

Ok, here we go!

Your goal here is to have your new team of an Explorer, Artist, Judge and Warrior review your Strengths from your Self-Assessment Worksheet and see if you can get a fresh perspective on your answers.

For example, let's say that you wrote "Teamwork" as one of your Strengths. That's great! Teamwork always makes the dream work. But how will each of these members of your new team view that Strength?

- An Explorer may want to have solid communication between the team members. What is the process for sharing new or relevant information? Is it easy and transparent?
- What about the Artist? If teamwork is the idea, how is the team working together with collaboration to innovate and drive new products, services or ideas? What does the Artist need to support that effort?
- The Judge evaluates and needs metrics and data. For teamwork, how are we quantifying that idea? What proof do we have that we actually are working as a team? Where is the accountability?
- For the Warrior, it is all about implementation. Tactically, how is the team built to be the best it can be? What training does the company need to be successful to make the team better? Does the team have the right tools and equipment?

For this exercise, list how the Explorer, Artist, Judge, and Warrior will view the Strengths you wrote on your Self-Assessment worksheet. What will they need to make each Strength better?

Weaknesses

Yikes. We have to share our Weaknesses with our new team. What will they make of these? I'll bet they will want to help change things for the better. Their unique viewpoints will give you some much needed perspective.

For example, let's say in the world of almost instantaneous shipping, your speed to delivery time needs improving. In your market, it is causing challenges and you are missing out on sales because you can't turn things quickly enough.

- The Explorer will want to try to find new options. What is causing the delay? Materials and resources? Production? As the "Theory of Constraints" states that you can only move as fast as the slowest part of your process, the Explorer will want to start navigating there. In this case, where is that?
- The Artist will want to try to design a better process. Through trial and error, the Artist will develop a new method. What will the Artist need to complete this task? Will they have the leeway to work up a few ideas?
- The Judge will want to prove things out. How long does each part of the process take? What makes the most sense to eliminate or to change? What data will be needed?

- All the Warrior will want to do is to jump in and go to battle improving the process. Everything here is 100% operationally defined. What types of people are needed and how are they going to work more efficiently? What training is needed? Are there better tools or technology that could be used?

List how the Explorer, Artist, Judge, and Warrior will view the Weaknesses you wrote on your Self-Assessment worksheet. What will they need to solve for each?

Needs

How do you think this new team will react to the items on your Needs list? What will they want to tackle or understand better? Take a look at what you wrote from your Self-Assessment Worksheet and view that from their different perspectives.

- The Explorer might keep looking for new resources. Is there another way to solve the Need? Who can we partner with or bring in to understand it better?
- The Artist will want to creatively build out the solution. What will they need to create this process? Where are the limitations?
- The Judge wants proof that these are the real immediate Needs. Get the data. Metrics, numbers, research. Have you exhausted all possibilities? What is the downside?
- The Warrior will want to jump in with both feet and start implementing the resolution. What will they need to get started? How long will it take?

Determine how the Explorer, Artist, Judge, and Warrior will react to the Needs list you wrote on your Self-Assessment worksheet. How will they implement each and get them going?

Wants

Remember, the items on the Wants list are the nice-to-haves ideas that are not mandatory, but would certainly help out. For each of our team members, what do you think they will say about what you wrote on the Self-Assessment? Will they agree with the things that you want?

- The Explorer might want to add to the list. Are there other things or ideas that are just as important? The Explorer will always search for the truth or something better.
- The Artist views your Wants and will want to start trying to create ways to make them work. How will they merge your ideas into how you work now? What is the first step?
- The Judge wants to know what success looks like. These are something that you Want, but why should you want them? Will getting them really make a difference? Prove it.
- The Warrior is itching to make these a reality. What will the action plan look like for implementation? Can you describe or illustrate that?

Illustrate how the Explorer, Artist, Judge, and Warrior will consider the items on your Wants list you wrote on your Self-Assessment worksheet. Will they agree that these are the most important? Write out their perspectives on what you listed.

Describe The One Thing About Your Business That You Wish Was Different

From these four unique perspectives, how will they react to what you listed here from your Self-Assessment Worksheet answer? Maybe what you wrote points a crooked finger of blame at one of them? Will they want to improve something? Take a minute and see your answer from their viewpoint.

- The Explorer will want to keep searching for more information and resources to help with this situation. Do you have enough to honestly make a good decision to make a new change for the better?
- The Artist will want to immediately start improving things by taking the inputs and thinking up new ideas to help resolve the situation. What creative solutions can they build?
- The Judge looks at the merits of your wish. Is this really what we want to change? There might be a lot of effort, money, and time involved to improve this. How do we know this is the right thing to do?
- The Warrior wants to push wish into action. What will they need to get started? Create the action plan for the Warrior.

Describe how the Explorer, Artist, Judge, and Warrior will want to work on your wish idea to improve your business that you answered on your Self-Assessment worksheet. What will they need to do to get started? How will their perspectives help flesh out the plan to make it happen?

3 Positive Things

On the Self-Assessment worksheet you listed three positive things about your company. Now, let's take those three ideas and use the lens of our new team members to see if they agree on what you wrote, and also how they could use them to the best advantage.

- The Explorer views things through the filter of finding the future. For the three positive ideas you listed, how could they use them to help navigate to a new idea?
- The Artist sees things through the lens of creating. With each of the three positive things, what can we create in your business to build on them?
- The Judge is an evaluator. How can we use those three positive ideas to test or prove something in the business has value?
- The Warrior is all about action. Take your three positive items and draft an action plan to use them in something.

How can we use these three positive things to help your business immediately? For each of the four team members, write out how they can do something with each of the three positive things. What can you do with them?

3 Negative Things

You knew we would get to this one too. Using your answers from the Self-Assessment Worksheet, let's take a look at what the team might do with the three negative things you listed. They are going to want to improve them, but how they go about it will be different because they are programmed to view things with their own unique perspective.

- The Explorer will see these three negative things as a place to start. Each one denotes the starting line for a new game on improvement. The Explorer will want to find the finish line. Describe that journey for each of your three negative items.
- The Artist wants to create their way out of the situation. Can you build a new process, product, service, app, job, or another idea to turn that frown upside down? Write out what the Artist will want to create to improve each of the three things you listed.
- The Judge sees the three things as a chance to build out some Key Performance Indicators to track and measure the problem. How did these three things turn sour? Probably because nobody was being held accountable. Data helps with that. Help the Judge evaluate progress toward fixing the three negative things by building a dashboard and ways to measure each of the items.
- The Warrior is the one that is going to improve these with some elbow grease. The Warrior is the worker. What will they be doing to improve each of the three things you listed? When should these be completed by?

For each of the four team members, write out the game plan for them to handle each of the three negative things that you listed from the Self-Assessment Worksheet.

What's The Best Thing That Could Happen To Your Company?

Our team loves this positive thinking. They are primed to make this a reality if they can. By now, you know what to do with this mental exercise. For each of the crew, write out how they view your idea of the "Best Thing" and see if they can map out how to get there.

- The Explorer will want to map out the journey on how to arrive at the "Best Thing" as fast as possible. If this was a road trip, you could detail how to get to point A to point B. What you would need for the trip? How much will it cost? Special landmarks or things to do along the way? For this section, detail that journey from the Explorer perspective. Map it out.
- The Artist is going to create that future. They are always happy to build or design something. Here, let's create the processes needed for success. We want Consistent, Predictable, and Repeatable results. Detail the processes needed for success to be able to achieve your "Best Thing."

- The Judge requires accountability. Who in the company will be working towards progress on our “Best Thing?” When should they do something? How long will it take? How do we know that quality is happening along the way? Help the Judge understand how you are going to prove that you are making progress.
- The Warrior sees the “Best Thing” as an opportunity for victory. Planting the flag on top of that mountain is what they are primed for in life. To achieve the “Best Thing” the Warrior will need to take action steps as outlined by the other team members. List out the training, support, encouragement and other things needed by the Warrior to accomplish the goal.

If you want to achieve that “Best Thing” for your company, write out for each of our team members their roles and responsibilities to make that vision a reality.

What's The Worst Thing That Could Happen To Your Company?

Our new team wants to avoid that at all costs. They are committed to making the improvements needed, but they need some direction first. Use your answer from the Self-Assessment Worksheet and detail each of their reactions and viewpoints to your “Worst Thing.”

- The Explorer sees that “Worst Thing” as a danger zone. Let's steer clear of that, and build out how to avoid the problem. Detail what the Explorer will do to map out our way around the danger. What landmarks or signs will be posted to help along the way?

- The Artist sees the “Worst Thing” as an opportunity for inspiration. Let’s double-down on creativity and construct something to avoid that doom and gloom. What will the Artist build?
- The Judge understands the “Worst Thing” as it is based on facts and information. The question is, are you getting these facts and information soon enough? Are you constantly reviewing them to alter your path and the choices you make? What are the facts and information that the Judge needs to pay close attention to to avoid the “Worst Thing?”
- The Warrior knows that to avoid the “Worst Thing,” they must do their best work. Quality counts. When you are action oriented, it pays to do things right the first time. How is the notion of quality tied up in avoiding the “Worst Thing?” List how you are connecting quality to action for the Warrior.

We want to avoid the “Worst Thing” for your company. In this section, detail how your team is going to view and implement their ideas to help negate this problem before it starts.

What’s The Biggest Problem You Face Right Now?

Here’s where our team gets to shine. On the Self-Assessment Worksheet you wrote down your biggest problem for your business. Hopefully you described this in some detail. Each of our four team members will have a different viewpoint on the solution to that problem.

- The Explorer takes that problem as the launching point for improvement. *"Here's where we are now"* is what they say in the beginning. What steps can the Explorer take today to navigate through the challenge? To help the Explorer best, chart out what success looks like. That's the finish line. From there, the Explorer can work backward and detail the steps necessary to achieve that success. Where do you want to go?
- The Artist is the visionary. Creative thinking is what they do best. What completely new and unique ideas will help solve this problem? The Artist doesn't have to have the logistical details on how to do it, as other team members can help with that. What color is your unicorn here?
- The Judge thrives on churning through spreadsheets and data. If the Judge is going to be evaluating ideas on solving this problem, what are the key metrics that they will use to complete that task? What does success look like? What about failure? What do you need to do every day?
- The Warrior knows that to avoid the "Worst Thing," they must do their best work. Quality counts. When you are action oriented, it pays to do things right the first time. How is the notion of quality tied up in avoiding the "Worst Thing?" List how you are connecting quality to action for the Warrior.

Solve that problem! Use the different perspectives that the Explorer, Artist, Judge, and Warrior can bring to shed new light on your challenge. Write out their responses.

What Do You Need To Solve This Problem?

It's go time! Your team wants to churn through the challenge like a hot knife through butter! What are they going to need to get the job handled?

- The Explorer is going to need the freedom to think ahead and permission to make mistakes. The right path may not be obvious. Will it be ok to double-back, or make a correction? You have stated the problem above and mapped out the journey. Now is the time to make sure that the Explorer is helping you navigate on the journey by looking for those landmarks and signs that the correct path is true. What benchmarks should be posted along the way to ensure success?
- The Artist will get to work creating and designing the solution. Be sure that the information and inputs needed are correct. There's nothing worse for an Artist than getting into the work and realizing that they have to start over or make corrections. They work better when they have the correct and complete information.
- The Judge is going to help the team by making sure that the numbers make sense and are correct. As you start to solve the problem, be sure to review the data and use your Judge's viewpoint to detail any corrections. Also, how often you examine the information is sometimes crucial.

- The Warrior is driven by action, so when working on solving your problem be sure they are fully engaged. Half-measures will produce half results. If they aren't making the progress they should, what is the reason for the bottleneck? Eliminate friction so the Warrior can be more effective.

Your team wants to create and develop solutions that work. What do they need to solve the challenge in front of them? Detail a checklist for making your result work.

Chapter 4 - Mining for Gold

Congratulations!

You just completed a massive amount of work. Spending mental energy is always the hardest to do, and putting yourself in uncharted and maybe even awkward positions is something to be championed.

So, are we finished? Not hardly.

The purpose of that work is to set you up with some new ideas that we can use to construct a new direction for your business.

The Self-Assessment Worksheet and the other six worksheets you filled out were to prepare the basic information for the rest of this book. Which is this idea:

Invent something new.

You will use the answers you provided to frame the ingredients for building a new direction for your business. One that is creative. That thinks things through. Is built on being prepared and proactive. That is customer-focused. That is profitable.

On those worksheets is the gold we are going to mine to create that new business plan. The next step for you to do is to cull through your answers and pull out the ones you like the best.

We are going to take those, create some action steps, and put those best ideas into motion. What you are looking for here are the ideas that have some merit. They don't have to be fully developed. In fact, they probably aren't.

- What is interesting or provocative?
- Could you do something with the idea if you have more time, skill, money, or talent? Don't rule it out!
- Unlike anything, you or anybody has ever seen. This might be your million dollar idea.
- Solves a customer problem.
- It looks like fun.

Mining For Gold

Take your best ideas from all of the worksheets and list them here. They can be under-developed, or a little weird. Different is good. We'll work on getting them ready for prime time later.

List those gold nugget ideas, so you can reference them in the next creative exercise. SCAMPER.

[Write Your Gold Nugget Ideas](#)

Strengths

Go through the six worksheets where we played around with these. Pick any and all that you feel are valid enough to use going forward.

Not every idea can make it to the big leagues, so don't include anything you have written that honestly don't feel will be a good choice to expand on later.

On this worksheet, list the Strength ideas that you feel have merit to help build your new business direction.

Weaknesses

On those six worksheets are ideas that you can use to help curtail your past business Weaknesses. Which ones do you feel are sound enough to explore going forward?

On this worksheet, list the ideas that you had that you feel are worth exploring to help mitigate your company's Weaknesses going forward.

Needs

Needs are immediate items that you need to get handled. They are mandatory and always a priority.

On the six worksheets, there probably are some interesting ideas on how you can tackle handling these immediate Needs. We want to explore the ones that look the most promising.

With this worksheet, jot down the ideas that make the most sense for handling your immediate Needs.

Wants

Remember, Wants are not the same as Needs. Wants are “nice-to-haves.” These are the secondary tier ideas that we can plan for and build, but not what we work on immediately.

In the worksheet group, you jotted down a bunch of ideas. Are any of them sound enough to want to dig into later? We need those.

On this worksheet, list the items that look promising for your Wants.

Describe The One Thing About Your Business That You Wish Was Different

I’ll bet this one was fun to explore. That “one wish” could make a significant impact to your business if it was developed and working for you. That’s why we want to see it included in our game plan moving forward.

In the six worksheets, was there a golden nugget or two that could make a difference?

On this worksheet, write down the ideas that will help your business the most.

3 Positive Things

We definitely want to include these going forward. What did you learn about them along the way? Can we increase their potential going forward?

What statements did you write that made the most sense?

On this worksheet, include any and all of the Positive Things that you want to see developed for your company.

3 Negative Things

Then there are these. It's ok to have negativity, as that can teach us about what to avoid or how to make things better.

On the six worksheets, what did you develop so you can learn how to make things better?

Here, fill out the best ideas you had for mitigating any of the Negative Things about your business going forward.

What's The Best Thing That Could Happen To Your Company?

Was this one a challenge for you? Sometimes it is hard thinking about what might be the best thing.

On the worksheets, how did you develop this idea? Were you able to find a few ideas that you can build upon?

On this worksheet, list the ideas that you wrote that could help you build a better company.

What's The Worst Thing That Could Happen To Your Company?

You certainly want to avoid this landmine. What did you develop? Anything useful?

On the worksheets, you explored many different ideas on how to sidestep the notion of this "Worst Thing" imaginable.

Now, on this worksheet, let's jot down your thoughts and best ideas on how to avoid this problem.

What's The Biggest Problem You Face Right Now?

It's looming out there and you want to solve it. Using those creative exercises, you spent a lot of mental energy considering the best way to solve this problem.

On those six worksheets, which of the ideas can you use and develop further?

For this worksheet, write down the best problem-solving ideas, and let's see what we can do to develop them.

What Do You Need To Solve This Problem?

Checklist time. You have your checklist, right? If not, it is time to create one.

Look through those six worksheets, and cull out the responses that you feel will be worth exploring.

On this worksheet, list the best problem-solving ideas that we can develop for your business.

Chapter Five: The Magic of SCAMPER

Earlier I mentioned using this tool from the legendary creative thinking book, *“Thinkertoys”* by Michael Michalko.

The purpose of mining for all of that mental gold that we just unearthed is so that we can develop new business ideas that nobody has seen before. To do that, we are going to use the SCAMPER idea checklist to enhance the answers that you have already written.

SCAMPER is an acronym for:

- Substitute something
- Combine it with something else
- Adapt something to it
- Magnify or Modify it.
- Put it to some other use.
- Eliminate something.
- Rearrange or Reverse it.

SCAMPER is a mental modeling tool that is used to unlock your imagination and develop new ideas quickly. Here’s an example of how this might work.

Let’s say that you want to develop a new lead generation process for your sales team to fill the pipeline. 60 We are going to use three types of questions to unlock new ideas. Using three types of questions, “How,” “When,” and “What,” many different scenarios will emerge.

- What lead generation process can I **substitute** for my current one?
- How can I **combine** my lead generation process with another one?
- What can I **adapt** from someone else's lead generation process?
- When can I **modify** something in my lead generation process?
- How can I **magnify** something in my lead generation process?
- How can I **put** my lead generation process to **other uses**?
- What is the **reverse** of lead generation?
- What type of **rearrangement** of my lead generation process may work better?

This type of creative process model will allow you to expand on the work that you have already completed.

For this exercise, use the favorite answers that you filled out on the Mining for Gold Worksheet and combine them with the SCAMPER tool.

SCAMPER

Use the answers you wrote in the Mining for Gold Worksheet and play with them using the SCAMPER mental filter.

You will come up with some interesting ideas, new processes, and even a few improvements that might make a considerable impact to your business.

[Get The SCAMPER Worksheet](#)

Substitute

With anything that you have written, you can substitute something to improve it. This is a trial and error method of replacing one thing or idea with another.

Thomas Edison tried over 3,000 different variations to perfect his original light bulb filament idea. One day, it worked.

For your scenarios, what can be substituted? Take a look at every answer on your Mining for Gold Worksheet, and consider replacing something with something else.

These can be:

- Rules
- People
- Ingredients
- Color
- Size
- Place
- Approach
- Technology
- Equipment
- Time
- Temperature

- Materials
- Function
- Emotion
- Service
- Format

On the SCAMPER Worksheet record any and all ideas that you have for anything you can Substitute. Use the three prompt questions to help you develop ideas regarding Substitution.

Combine

When ideas merge, the result often is something that is bigger than the original pieces. Combining unrelated things can sometimes increase the overall value.

For example, when you combine a standard business copier with a telephone, the result is a fax machine. And at one time, suitcases didn't have wheels.

It is the combination of ideas that bring out the distinction and new functionality that makes a difference. The goal now is to review your answers on the Mining For Gold Worksheet and playfully think of what you can do to combine any of your answers with something new.

One thing that might help is to consider a problem that your customer base is having. Put them first. Using your answers, what can you find that if it was in the right combination would help alleviate a big problem for customers?

Here are some combination ideas to help you with this exercise:

- What ideas can be combined?
- What processes can be combined?
- What quantities can be combined?
- What products can be combined?
- What services can be combined?
- What uses can be combined?
- What materials can be combined?
- What packaging can be combined?
- What technologies can be combined?
- What jobs can be combined?
- What functions can be combined?
- What resources can be combined?
- What platforms can be combined?
- What companies can be combined?

Review your notes on the Mining For Gold Worksheet and pull out any that can be subject to a combination. You can combine your ideas, or combine an entirely new one using one or more of the prompts above.

On the SCAMPER Worksheet record any and all ideas that you have for anything you can Combine. Use the three prompt questions to help you develop ideas about Combining things.

Adapt

Here's a tip. You don't have to be completely original. One way to arrive at a new destination is to take a short cut. We can do this by adapting one idea that is working well somewhere else to the problem that is before us.

For example, it is very common for a movie to be adapted from a book or even an article in a magazine. In 1987, Frank Darabont turned one of Stephen King's novella stories from "*Different Seasons*" into a screenplay. That's how "*Rita Hayworth and the Shawshank Redemption*" became the classic movie, "*The Shawshank Redemption*."

You can adapt one idea into something that works for your business too. Take a minute and read through what you wrote on the pages in your Mining for Gold Worksheet. Then ask yourself a few questions:

- Is there something similar somewhere?
- Is there anything from history like this?
- What different scenarios would this idea work well in?
- What other industries could use this?
- What products or services could I use to adapt to what I'm doing?
- What favorite things or ideas can I use?
- Are there any processes that could be adopted?
- Can I take my idea and apply it to a different market?
- What ideas from nature can be adapted?
- Can I take an idea from another industry and adapt it to mine?

- What can I adapt to make my idea work faster?
- How can I adapt my idea to a new service by using technology?

The original water pump usage designed for farm use was adapted for the luxury bath market in 1968 by a couple of brothers named Jacuzzi. Adapting an idea for another use can literally transform the concept into something groundbreaking.

On the SCAMPER Worksheet record any and all ideas that you have for anything you can Adapt. Use the three prompt questions to help you develop ideas about Adapting things.

Magnify

Is bigger always better? Maybe.

If you want to stand out from the crowd, sometimes it pays to be Godzilla. In this section, we want to examine the answers from your Mining for Gold Worksheet and see what new ideas we might develop if we magnify something.

Here's what I mean:

- What can be exaggerated or oversized?
- Can you add something to make it bigger, stronger, longer, higher, or heavier?
- Can it be more frequent?
- Could you add a bonus?
- What about more features?
- Could you add more time?

- Could you make it more intense?
- What if it was louder?
- Could it be brighter?
- What would make it more obvious?
- What if it smelled better?

There is a reason fast food companies super-size their menu. Bigger sells more. If you make the cup bigger, but add more ice, you don't necessarily add more product. But you can charge more because now it is "Super-sized."

What can you magnify from the answers you wrote on the Mining for Gold Worksheet?

Use these as the basis for new answers for the SCAMPER Worksheet. List any and all ideas that you have for anything that you can magnify. Use the three prompt questions to help you develop ideas about Magnifying things.

Modify

Yes, another "M" word in SCAMPER. It's ok. Magnify and Modify can sometimes be interchangeable.

If there is one thing you are doing here, it is Modifying your business. In this segment, we want to look at the answers from the Mining for Gold Worksheet and think about how you might Modify something to make it better or give it a different purpose.

For example, think about how ketchup is constantly stuck in the bottle and hard to get out. To make it easier people sometimes turn the bottle upside down for a bit and let gravity push the product down to the opening so it's easier to use. Ketchup brands recognized this and placed the cap on the bottom so that the product flows better.

In your business, what can you Modify to make things better? Let's use some starter questions such as:

- Can you modify the name?
- Could you modify the packaging?
- Can you change the color?
- Could you modify the shape?
- Could you modify the team?
- What about modifying the smell?
- Could you modify the opacity? Make it transparent or more opaque?
- Could you modify the weight?
- Could you modify the start time?
- Can you modify the thickness?
- Could you modify the viscosity?
- What about modifying a process?
- Could you modify the verbiage?
- Can you modify an attitude?

Of course, there are more things you can Modify, but you get the idea. If nothing is off-limits, what might you tweak or change?

Take your answers from the Mining for Gold Worksheet and see what you might want to Modify to make it work better somehow. Record your new thoughts on the SCAMPER Worksheet so you can use them later. Use the three prompt questions to help you develop ideas about Modifying things.

Put It To Some Other Use

We all know about recycling or repurposing materials. Scrap waste can be turned into another product by simply being inventive. The same goes for your ideas or challenges.

Examine your answers on the Mining For Gold Worksheet. Using the context and putting them to another use, are there any ideas you can create that would be purposeful?

Some questions to ask:

- What else can something be used for?
- Can you recycle something?
- Would another industry find value?
- What other uses could it have if it was modified somehow?
- What about adding something to create something new?
- What is the most wasteful part of your process? Any opportunities?
- What could benefit someone else?
- Could it be an ingredient in something else?
- What product or service in another industry is similar?

A good example of this would be the current use of t-shirt fabric to make non-medical grade face protector masks. As sales dropped significantly from the coronavirus pandemic, the apparel industry shifted to making and decorating these products.

Review your answers and see if you can discover another purpose in what you do. Record your thoughts on the SCAMPER Worksheet. Use the three prompt questions to guide you and help develop ideas regarding Putting Something To Another Use.

Eliminate

Interesting things happen when we remove something from an idea. Many times a significant change happens that elevates the idea to another level.

A great example of this is the ubiquitous cell phone. Originally, cell phones all used physical buttons. To key in a number or message, you clicked the key. Steve Jobs and Apple eliminated this with the invention of their interface. Finger swipe gestures and contact with the screen replaced the real button.

In this section, your job is to look at your answers from the Mining For Gold Worksheet and think through what you might eliminate to strengthen your idea.

Here are some starter suggestions:

- Weight
- Versions
- Size

- Understate something
- Rules
- Time
- Materials
- People
- Processes
- Products
- Cost
- Parts
- Suppliers
- Language
- Technology
- Packaging
- Friction
- Energy
- Ingredients
- Travel

Adding to a list of what to Eliminate is easy. You can probably name dozens more. But in your own business? What can you Eliminate that would make a world-changing difference?

Amazon is a great example, as they have Eliminated the need to have retail space. People all over the world, simply order online.

List your ideas on what you can Eliminate from your business that would make a big impact. Use the SCAMPER Worksheet to record your ideas. If you need them, use the three prompt questions to help determine ways you can Eliminate something from your business.

Rearrange

In the book *"Tinkertoys,"* Michael Michalko writes *"Creativity, it could be said, consists largely of rearranging what we know in order to find out what we do not know. Rearrangement usually offers countless alternatives for ideas, goods and services. A baseball manager, for example, can shuffle his lineup 362,880 times."*

In your own business, you have probably rearranged things before. Employee hours, furniture, a delivery schedule, or maybe a marketing post. Sometimes the order in which things happen can make a significant difference to the overall success of an idea.

Here are some ideas on what you could possibly Rearrange:

- Components
- Layout
- Patterns
- Sequence
- Schedule
- Pace
- Process
- Dimensions

- Scale
- Color
- Display
- Verbiage
- Direction
- Height
- Temperature
- Order

Big or small, complex or simple...what you Rearrange could make a difference towards your success. Take a few moments and reread your answers that you choose on the Mining For Gold Worksheet.

What could you Rearrange that would make a significant difference? Write these down on the SCAMPER Worksheet. If you need them, use the three prompt questions to help determine ways you can Eliminate something from your business.

Reverse

Then there is the idea of Reverse. Michalko writes, *“Reversing your perspective opens up your thinking. Look at opposites and you’ll see things you normally miss.”* We have worked on this idea earlier in our process, so you may be a little familiar with it. But let’s explore this notion further.

Here are some thoughts to get you started:

- Can you transpose “Positive” and “Negative?”
- What about slower instead of faster?
- Could you consider your idea or process in backward order?
- What is unexpected?
- Can up be down?
- Can visible become invisible?
- What services could be reversed?
- Do something at night instead of the day?
- When is failure a success?
- Less energy instead of more?
- What if it used less technology?
- Instead of thinking about the future, what about looking to history?

Reversal is an idea-generator.

To increase sales with merchandise, sports teams will sell “Throw-back” or vintage jerseys. Stores sometimes advertise pricing from twenty years ago. Zappos and Amazon pay new employees to quit.

Sometimes finding the right answer for you may rest in looking in the opposite direction. Review your favorite answers from the Mining For Gold Worksheet. On the ones listed, how could you apply the notion of Reverse, to create a new opportunity?

List your answers on using the technique of Reversal on the SCAMPER Worksheet. If you need them, use the three prompt questions to help determine ways you can Eliminate something from your business.

Chapter Six: New Idea Implementation

If you have invested the time and mental energy in completing the series of worksheets for this book, you have generated a lot of new ideas.

Were there a few that stand out that you can use? There should be. If not, go back through the exercises and see if you can play around with the different mental models and come up with something that will work for your situation.

Our goal now is to take these new ideas and build a new business plan that will work.

Why do you need a business plan?

For starters, this is going to help your company create the direction it needs to focus on solving your customer's problems. What you want is to create a sales bullseye on the target that you can use to aim your business.

Define the likeliest to purchase for the most revenue and develop a sales process based on that criteria.⁶² This is a way to focus your intent on the goal that you want to achieve twenty-four months from now.

After you create the new business plan, the next step will be to set action steps and goals to realize your vision you have for the company.

But before we can get to any of that fun stuff, let's do the work creating that customer bullseye that you can use to focus your efforts.

Chapter Seven: The New Business Plan

Whether you have an existing business plan or not, doing this work is going to add tremendous value to your future business success as this will take your new ideas and give them direction.

To write the business plan, you are going to use a template that was created for this book to help you construct the answers easily. We want to use all of the Worksheets that you have completed, but most importantly the Mining For Gold and the SCAMPER Worksheets.

When you finish this new business plan it will allow you to have several key advantages:

- **Focus**
- **Organization**
- **Structure**
- **Benchmarks**
- **Accountability**

The Business Plan is divided into ten segments, but in the end, this will exist on one single page. What we are shooting for here is clarity. It will be defined intent.

Don't forget, how customers behave and purchase now may be different than in previous years. You want to link what you do with the current customer choices and behaviors.

The ten areas of the plan include:

1. Customers
2. Customer's Problem
3. Your Business Solution
4. Value Proposition
5. Sales Channels
6. Revenue Streams
7. Cost Structure
8. Key Metrics
9. Competition
10. Your Unfair Advantage

Write Your Business Plan

Writing a business plan is the key to defining your sales and marketing bullseye. Without a target, how can you aim your new business ideas properly?

Use the Mining for Gold and SCAMPER Worksheets and define your business intent for the next twenty-four months. Use the sections on the next few pages to assist in writing your new one-page business plan.

[Write Your New Plan](#)

Customers

Businesses do not exist without customers, so they are the most important thing when we create a business and action plan.

Who are yours?

Whether they are actually spending money with you now or not, we need to completely understand them. The goal is to have alignment with what your customers need to what you are fantastic at providing.

The Worksheets that you have been filling out should have given you a good indication of where you fit in with your customers.

Answer these questions:

- Describe the most profitable order for your business. Not the largest order. The most profitable.
- What type of person, business, organization, or customer places that type of order?
- Who makes the buying decision for that type of purchase?
- What is the preferred method of purchasing? In-person? Online?
- How frequently do they buy?
- What do they deeply care about?
- What frustrates them?
- What are their future goals or aspirations?
- What do they hate? What do they love?

The goal with this section is to get a clear understanding of who your customers are, as they define the target you are focused on. *“We will sell to anyone that has the cash”* is not an acceptable answer. How would you create a marketing plan based on that?

Review the material answers from the worksheets. Can you define your ideal customer based on these answers? If not, what do you need?

Using bullet points, write out descriptive truths of your ideal customer based on the questions above and the Worksheets that you completed.

Customer’s Problems

Whether you sell hot dogs with a street cart or expensive automobiles you are in the business of solving problems for your customers. One keystone to the success of your business is completely understanding your customer’s problems and how you fit into the matrix of solving them. 63

Do you think you have that level of understanding?

People will pay more for anything that they find valuable and that solves a particular problem.

For example, Tony wants to propose to Maria and is shopping for an engagement ring. What is his problem?

All jokes aside, the anxiety and stress associated with choosing the right stone, setting, and design are considerable. The solution to his problem is the guidance offered by Susan, the jeweler, to help him select something that Maria will be proud to wear forever. That is the value that the jewelry store professional provides. ⁶⁴ Not in the price of the ring.

What should Susan market more to bring in more customers like Tony?

When thinking about your customers problems ask these questions: ⁶⁵

- What problems are they paying to solve?
- What is the one thing they would improve? ⁶⁶
- What is annoying?
- How will it change their status?
- What are they afraid of?
- What was the biggest mistake last time?
- What is the one thing that absolutely has to be right?
- What does success look like?
- What would make things frictionless?
- What are they trying to avoid?
- What will they tell their friends?

Can you solve your customer's problems based on these questions? How does it look when you match what you wrote on the Worksheets to these questions?

Do you know what your customer's top three problems are?

Using bullet points, write out a list of your customer's top problems based on the questions above and the Worksheets that you completed.

Your Business Solution

Here is where the rubber meets the road. If you can define your best customer with their top problem, do you have an ideal solution?

If so, you probably will have a great business.

But what if you have a great solution, but haven't defined the best customer or their top problem? That is the Ready, Fire, Aim version of hitting the bullseye.

Everything needs to match to work well.

Here are some questions to ask:

- Does the perfect solution to your customer's problem fit into your business wheelhouse? Are you good at it?
- How will you solve the customer's problem? Have you defined the process?
- What are the benefits that the customer will realize when you solve their problem?
- What emotion will they feel when you solve it? Happiness? Relief? Laughter?
- Do you have a solution that is Consistent, Predictable, and Repeatable?

- What tools, people, skills, products, services, technology, or other items are necessary to solve your customer's problem? Is this something that you possess?
- How is your solution to your customer's problem unique?

With what you wrote on the worksheets, illustrate the process of how you can solve your customer's top problems. How will you do it?

Value Proposition

Can you sum up your entire business into one sentence?

What is your true value?

Sometimes this is called an "*Elevator Pitch*." Meaning if you were in an elevator and had a few moments with a complete stranger to describe your company, what would you say?

Here's a test. Complete the sentence:

At *(name of your company)* we help *(customers)* with *(problem)* by *(solution)* we do this with *(market differentiator)*.

Can you rewrite that sentence with your own words to form your new elevator pitch? Try it! Then practice it a few times so it flows from you and it's easier to say.

It is ok to play around with the wording or order to make the pitch sound better.

The one thing that you should understand completely is the value that you bring to the customer. How do they see you? ⁶⁷

Is your company one of these:

- Operational Excellence - this is a business that is a low-cost leader. These businesses run a tight ship, and function well because of efficiencies, automation, or technology. Think of Amazon or IKEA.
- Product Leadership - this is a business that is always cutting edge. They are best in class and constantly bring new ideas to the market. Think of Apple or Tesla.
- Personalized Experience - this is a business that focuses on customer intimacy. The experience is often one-of-a-kind and built on an individual level. Think of Disney or Netflix.

How would you say your business matches up to one of the three listed above? Is there a better way to categorize your company?

What is different or unique about your business? How will you stand out from your competitors?

Write your elevator pitch ⁶⁸ and value proposition on the Business Plan Worksheet.

Sales Channels

Specifically, where does your customer hang out? There is an old saying, "*You hunt where the deer live.*"

This is important, as it is key to building an effective sales and marketing strategy.

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These are important pieces of information to know:

- Physical geography. Addresses, cities, neighborhoods.
- Relationship geography. Associations, clubs, organizations, groups
- Social media channels.
- How do they like to be communicated to? Emails, text messages, phone, snail mail?
- What kind of content do they enjoy? Articles, blogs, videos, images?
- What type of sales channel is preferred? In person? Online? Retail?
- How robust is your mailing list? Have you created drip marketing campaigns?
- Where do they network? Trade shows? Associations? Bars or clubs? Sports? 70
- Can you describe their community?
- Instead of storytelling, can you be story making? 71
- How solid is your referral network? Who can recommend you?

Note: You may already have written a business plan. If so, that's great. However, if you are like a lot of business owners this plan gets stuck in a folder somewhere and is rarely used. Time to update!. It is vital that you understand that customers may have changed their purchasing behavior. Adjust accordingly.

List all applicable sales channels that serve your customers best.

Revenue Streams

How do you make money? That's always the biggest question isn't it?

There are a few types: 72

- Transactional revenue. You sell a product.
- Service based revenue. You perform a service.
- Project revenue. You build out a project.
- Recurring revenue. You sell a subscription.
- Affiliate revenue. Someone else sells for you.
- Advertising revenue. Someone pays you to market for them.
- Commission revenue. Someone pays you to sell for them.
- Licensing revenue. Someone pays you to use intellectual property that you own.
- Rental revenue. Someone pays you to use real property that you own.
- Brokerage revenue. You make money for other people or companies to do business with each other.
- Freemium revenue. The basic level is free, but you make money with upgrades.

How does your business bring in more revenue?

One way is to build out more revenue streams. Cash is the basic fundamental need for any business. Before you can create profit, you need to have sales. Take a minute and explore if there are more opportunities before you.

Using the ideas you wrote on your Mining For Gold and the SCAMPER Worksheets, can you envision other ways to add a new revenue stream to your business?

List all current or potential revenue streams for your business.

Cost Structure

What does it cost you to be in business?

There is a tried and true adage that applies here, *“You can’t manage what you don’t measure.”* For your business, how are you measuring your costs? It absolutely can not be a gut feeling.

You have to know.

If you don’t know your costs, how can you calculate your profit? Often when I am starting to work with coaching clients this is one of the basic tasks that we complete. It seems like business owners should know this, but many simply don’t.

You can not have an effective business plan without understanding this tenet of being in business. On the Worksheets that you have been creating, how many problems listed were grounded in something financial? Take a hard look at this. Especially now, as you are reorganizing and planning for a different future for your business.

What needs to change? Can you eliminate something? Operate with a leaner attitude?

Let's examine some basic ideas of costs:

- Cost Object. This is an accounting term. Define what you want to determine the cost of. This could be a specific product, service, or project to a type of client or geographic area. What is your profitability for everything you do?
- Traceability of Costs. These are either "Indirect Costs" or "Direct Costs."
- An Indirect Cost is an overarching expense such as insurance. It is difficult to apply that expense to the costs of a product.
- A Direct Cost is an expense such as the cost of materials to produce a product.

Cost Key Drivers - what causes costs to change? These can be either "Variable Costs" or "Fixed Costs"

- Variable Costs are those that change in proportion to sales and operation volumes. An example could be labor or raw materials.
- Fixed Costs are costs that do not change despite an increase in sales or operation volumes. Examples could be rent or property taxes.

If you need more help understanding your business costs, it may be worthwhile to consult with a cost accountant to get some specialized advice.

However, if you want to dig in yourself, a good way to start is by defining your Cost Object first. What are you targeting? Then dig into the Direct Costs and Variable Costs for that object.

All in all, know your numbers.

Some other thoughts:

- For your new idea, what will it cost to build and sell your solution?
- Are costs monthly? Yearly? One-time?
- Will you need employees or contractors to help?
- What will your operational costs be for this idea?
- Can you determine the basic overall cost of running your business monthly? Compare that to your projected sales.
- Are you spending time to save money? Many successful business owners spend money to save time. ⁷³
- What is the number one factor for limiting your profitability?

Using the ideas you wrote on your Mining For Gold and the SCAMPER Worksheets, write out your cost structure and how you are determining your profitability.

Key Metrics

As we have already learned, this is where the Judge lives. Your business needs the accountability of constantly tracking and looking at the benchmark numbers for your company.

Key Performance Indicators or KPIs are a vital tool for your business. Without these metrics, you are operating your business blindfolded.

While it is great to look at historical data, such as top line sales figures, you should also track future looking KPIs such as sales opportunities in the pipeline, the number of quotes or presentations given, production orders that are ready on the schedule, or other factors that are similar to your business. ⁷⁴

Here are some of the best KPIs to track ⁷⁵, you determine which ones suit your business the best:

- Profit - analyze both gross and net profit
- Costs - measure cost effectiveness and find better ways to reduce and manage your costs
- Actual Revenue vs Projected Revenue - where are you in relation to your sales goals?
- Cost of Goods Sold - total your production costs for what you sell and get a better idea of what your product markup should look like. This also helps determine profit margin.
- Expenses vs Budget - compare your actual overhead costs vs what you wrote on your budget.

- Customer Lifetime Value ⁷⁶ - Calculate this using these formulas:
 - Average Purchase Value = Total sales / the number of sales
 - Purchase Frequency Rate = Total number of orders / total number of customers
 - Purchase Frequency Rate = Total number of orders / total number of customers
 - Calculate Average Customer Lifespan = Number of years in business x the Average Customers Per Year
 - Customer Lifetime Value = Average Customer Value x Average Customer Lifespan
- Customer Acquisition Costs - How much money does it take to acquire a new customer?
 - Total Marketing Costs / Number of new customers in same period
- Total Number of Active Customers - how many are currently buying from you?
- Customer Support Tickets - how many customers are asking for help?
 - What are the main issues?
- Defects or Errors - track what is going wrong
- Efficiency - how many per hour or other targets
- Employee Turnover Rate - how many employees leave you per year?
 - Total number of employees that left / Average number of employees

- Customer Churn Rate - this is the percentage of customers that fail to make a return purchase within a period of time. (Quarterly, yearly, etc.)
 - $\text{Number of customers lost} / \text{number of customers at the start of the period}$
 - Also be sure to look at the number of customers that should have renewed
- Number of New vs Repeat Website Visits - are you driving new eyeballs to your website?
 - $\text{Percent of New Visitors} = \text{Website visits by new visitors} / \text{Total website visits}$
- Average Annual Expenses to Serve One Customer - what does it cost for each?
- $\text{Total Expenses} / \text{Total Customers}$
- EBITDA - Earnings Before Interest Taxes Depreciation & Amortization - this measures the revenue after expenses are considered and interest, taxes, depreciation, and amortization are excluded.
 - $(\text{Revenue}) - (\text{Expenses Excluding Interest} + \text{Tax} + \text{Depreciation} + \text{Amortization}) = (\text{EBITDA})$
- $(\text{Customer Lifetime Value}) / (\text{Customer Acquisition Cost})$ - this is a ratio of and should ideally be greater than one, as a customer is not profitable if the cost to acquire is great than the profit they will bring the company.
 - $\text{Net Expected Lifetime Profit from customer} / \text{Cost to acquire the customer}$

- Average Number of Presentations or Quotes - tracks future orders
- Average Number of Winning Sales Orders - how many winning deals are you obtaining in a period?
- Average Closure Percentage Rate for Sales - tracks the percentage of winning deals
 - $(\text{Number of Winning Sales Orders}) \times 100 / \text{Number of Presentations or Quotes}$

Of course, this may be an incomplete list. Your KPIs should be tailored to your company. What makes the most sense for you to track? Your numbers need to be valuable to you.

Using the ideas you wrote on your Mining For Gold and the SCAMPER Worksheets, write out your Key Metrics that you need to track. How are you going to use them? List your processes.

Competition

Your business competes with others. That's a fact. While you may feel like you are the "*only one*" that can do what you do best, the fact of the matter is that your customers may decide to spend their money elsewhere.

So, take a moment to consider your competition.

What other opportunities can your customers spend their money, time, effort, or attention? Why are they doing that? If they aren't spending money with the competition yet, that's ok too. You should know what they are doing and why they are relevant in your marketplace.

Here are some thoughts to help you define this:

- What are the top two or three competing businesses that serve your same audience?
- What do they do well?
- What do they do badly?
- Look at their marketing. How are they positioned?
- Research their social media channels. What are they doing?
- Are your current or potential customers engaged with them on social media?
- How is their company structured for sales? Online? Retail? Salespeople?
- What is their top product or service?
- What else besides these companies could be in competition with your customers for their sales? Maybe they save their money and don't spend. Or spend their money with another industry.

The reason why you need to research and understand your competition is that this can help you define how your business is different or unique. In order to stand out from the pack, you have to know what they are doing.

Using the ideas you wrote on your Mining For Gold and the SCAMPER Worksheets, write out a description of your Competition and their strengths and weaknesses.

Your Unfair Advantage

It all comes down to this.

What do you have in your business that is so unique to you that it can not be duplicated or marketed by anyone else? Nobody can buy it, because it is uniquely yours.

What is your Unfair Advantage? *77*

It is like what if Michael Jordan had to go one on one with a bunch of sixth grade kids in a basketball game. Who would win?

This is the thing that you want to shout out from the mountaintop and let everyone know about it. This the idea, process, product, or service that you have been defining with the worksheets from this book. It is what you are developing with this business plan.

It is the *“one source of truth”* about your company. *78*

Think about legendary companies in business right now. Apple, Amazon, Tesla, Google, Disney. What are their Unfair Advantages they have over everyone else?

What makes them unique is that they have spent time, money, and effort defining their Unfair Advantage and have branded that. Sure, they all have competition. Just like you. But, they have carved out space for themselves by mastering their Unfair Advantage.

Think about these ideas for a minute and compare to your statements from the Worksheets:

- Expert in your field
- Your dream team for staffing
- Personal authority - you are an influencer
- Patents or copyrights you own
- Background or skill set
- Technology
- Customer experience
- Community or tribe
- Existing customers
- SEO ranking
- Unique talent
- Single-minded focus on one thing
- Industry leadership
- Branded process

It all comes down to this idea. *“Why should anyone buy from you? What makes you unique?”*

Can you answer that in detail? 80

Here's what it is NOT:

- Low price leader. You don't want to win the race to the bottom. I challenge you to be the most profitable in your category. Seth Godin says, "*Low price is the last refuge of a marketer who has run out of ideas.*" ⁸¹
- Great customer service! This is a default expectation. Customers demand to be treated correctly and like they matter. You can't talk about your customer service in your marketing, but your customers can. This is called a testimonial.
- Fantastic quality! Again, this is the default expectation. You should be building quality into everything you do. Like customer service, your customers should be the ones talking about your quality, not your company.

Using the ideas you wrote on your Mining For Gold and the SCAMPER Worksheets, write out in simple terms what you consider to be your Unfair Advantage.

Chapter Eight: Daily Action Planning

Let's review the work that has been accomplished so far:

- You detailed a snapshot of your current business health and situation. This was your starting point.
- You challenged the notion of what was a "Right Answer." This unlocks your mindset to think clearly about tangible goals and direction.
- You thought through unconventional ways to acquire and build your company through the mental framework of "That's Not Logical."
- You thought through unconventional ways to acquire and build your company through the mental framework of "That's Not Logical."
- You used your creative imagination to dream up new scenarios and ideas with the power of "What If?"
- You deployed the incredible energy of play and coupled that with the filter of using constraints with the "Play is Frivolous" challenge.
- You examined your business from four unique perspectives of the Explorer, Artist, Judge, and Warrior in the "That's Not My Area" work.
- Then, you listed all of your favorite ideas and notions in the "Mining For Gold" worksheet.
- After that, you used the fantastic power of the SCAMPER tool to take those favorite ideas and tweak them into something new, creative, and usable.

- And last, but not least, you championed these ideas into a new One-Page Business Plan for your company that will use these new ideas and tools to form a new beginning for your company.

If I was there with you I'd give you a gigantic high-five. That is a lot of work. But I hate to tell you this.

It doesn't matter at all unless you put these ideas into Action. Most people are superior planners and inferior doers. 82

Here's a quote that can help you understand the next phase of your business turnaround:

"In preparing for battle I have always found that plans are useless, but planning is indispensable." - Dwight D. Eisenhower

What did Ike mean by that?

To me, it is the fact that the *"Doing"* is what matters most. It's the action step where people usually fail.

However, all of the mental work that is involved in planning the action is crucial to the ultimate success of whatever you are working on. That's what you have been preparing for up to now. In doing so, you get to be like Ike.

This next phase is the most important. The Action.

Without Action, plans are worthless. In fact, I've been using a motto for a few years now that I want you to adopt. I'm writing this in all-caps on purpose.

ACTIONS REVEAL PRIORITIES

It is not what you do, say, or plan that matters. It is the actions that you take that will determine your fate. Go back and reread Chapters One and Two. They are short and it won't take that long.

For our next few chapters, we will be organizing and putting an Action Plan in place for you to use your new One-Page Business Plan to it's the best advantage. We want to map out the processes that will lead to your success.

There is one essential tool that we are going to use that you probably already have in your arsenal.

A calendar.

This is a fantastic tool for business that is often underutilized. The power in the calendar is that it can dictate the *"When"* something has to happen. When you set a date on something you are creating a deadline. All work leads up to that deadline, and you can break large tasks into smaller workable chunks.

Of course, a calendar only is as good as your ability to stick to the deadlines you set.

Using the One-page Business Plan as a tool, and coupled with some other ideas that are in the next chapters, we are going to focus on these deadlines:

- By the end of today
- By the end of tomorrow
- By the end of this week
- By the end of next week
- By the end of the month
- By the end of next month
- 90 Days
- 100 days in a row
- The Big Domino ⁸³
- 6 months from now
- 1 year from now
- 18 months from now
- 24 months from now

Have you ever charted the work out in working on your business like this before?

Here's a Pro-Tip: You should be constantly creating and achieving these deadlines. They roll over too.

When you accomplish the goal of *"What you should be doing by the end of today,"* that doesn't mean you are off the hook for that tomorrow. When the morning comes, you'll still have things to accomplish.

What we want to detail in advance, is what you and your team should be accomplishing. Not in with the flying by the seat of your pants mode. Action planning starts with understanding what needs to be accomplished. You have a lot of work to do.

Let's get some clarity about these deadlines.

The Daily Worksheet

This is a one-page form that you can use to chart out your activities. Not only for today, but all the way out two years from now.

It is incredibly powerful, but only if you actually use it. That's the trick. Click the button to get started.

[Get the Daily Worksheet](#)

Master the habit of showing up and taking action daily. 84

Grab a three-ring binder, folder, or maybe even a cardboard box and keep these to review later. A year or two from now it might be fun to look back on what and how you were working.

By The End of Today

It seems fairly simple, right? What are the major goals and accomplishments that you need to absolutely accomplish before you stop working for the day?

Not, *"I wish I could do it."* Or, *"I hope this gets done."*

The mindset here is that *"the earth will end and there will be a zombie apocalypse"* if I don't complete these tasks. It could be one big thing. Or forty. You can do them, or you can delegate them.

Start charting and detailing this every day. Some people call this a "to-do" list.

When you are home later enjoying dinner with your family, you should call it a "done" list.

Write out the "without fail" things that have to be accomplished before the end of today.

By The End of Tomorrow

By the end of today, you should plan out your top priorities for tomorrow. If you consistently do this it becomes a fantastic habit to have in your arsenal.

Imagine the freedom of beginning your day working on your top priorities. You grab a cup of coffee and sit down, and you are instantly working on the number one thing you need to accomplish.

This works because you have already identified it yesterday.

This also means that you can delegate to your team their top priorities a day in advance as well. You set them up for success when you articulate what they need to do, and they know that they have to accomplish those tasks by the end of the day as well.

This is called Clarity, with a capital "C."

By The End of the Week

Some goals are a little bigger. You can't do them in a day. But you can break them up into smaller chunks, and by the end of the week, they are complete.

Remember, you want daily progress on a weekly goal. You do not want to wait until Friday to try to hit the goal. Most people fail at that.

List out your priorities for the week, and detail each day what part of that goal you are working on. If you do this right, you may actually have things handled by Thursday sometimes.

How often have you accomplished things early? That never happens when you wait until the last minute.

By The End of Next Week

Start the practice of looking ahead.

- What should your business be focused on to have accomplished by the end of next week?
- What can we do now to support or prepare to accomplish that goal?
- What are the top problems that need a solution?

Does it mean you need to do something today? Maybe. What tiny part of next week's goal can you handle in the next ten minutes? This is where that idea of stacking fits in nicely.

A constant stream of small wins will equal a longer-term victory.

By The End of the Month

Month-end goals are usually significant. Sales quotas. Progress towards a quarterly or yearly goal. Big numbers.

Of course, you can't hit monthly goals without accomplishing your daily and weekly goals. Have you segmented your numbers so you know ahead of time what needs to be done?

As the month progresses do you know the percentage of the work left to do to hit the goal? If you want to have positive results, keep a dashboard or spreadsheet active, and constantly review your progress.

By the End of Next Month

The same goes for this one. Where do you need to be eight weeks from today? Are you thinking about that daily?

Chances are before you read this book that thought never entered your mind. Most business owners only think in terms of either what's right around the corner, what's in the rearview mirror, or what I need to do by the end of the year.

Eight weeks from now is not usually at the forefront of your mind. It should be.

That's far enough away to be out of sight, but close enough to be achievable.

As an example, what big orders or sales happened by that date eight weeks from now, but last year or the year before? Are those customers coming back? Have they booked that order yet?

What promotions or marketing opportunities are out eight weeks from now? You better have those on your marketing calendar and the content already prepared. If not, get those assigned and created.

Today, get that research and thinking completed on what needs to happen two months from now. Start delegating. Work up a mini-Action Plan.

In 90 Days

What needs to be completed ninety days from now? This needs to be on your radar today.

Why?

These longer-term goals are going to take planning, people, and resources. Have you ever heard the phrase *“you should be working on your business and not in your business?”*

This is what they mean. 90 days from now you should have a chunk of accomplishments handled. Your task here is to create the checklist today that illustrates what is needed.

Goals, accomplishments, milestones, tasks, certifications, partnerships, audits, agreements, new hires, programs, plans, deals, content creation. What is on your plate that needs to be handled three months from now?

- Who is going to do them?
- When will they need to be handled?
- What will it take?
- How much will it cost?
- What outside resources such as suppliers, contractors, or consultants could we use?
- What would benefit customers the most?
- What industry events are happening?
- What other questions or research will you need to have handled?

Today is the day for you to list that out. Keep thinking about what has to happen 90 days from today. Do this every day. Use a calendar. Talk to people. Start working on a plan of attack.

100 Days In A Row

I call this “Don’t Break The Chain”! 85

What daily routines do you want to include in your planning that you need to do every single day?

- Planning for tomorrow and future events
- Calling a customer and saying Thank You.
- Selling and closing a deal.
- Hitting a daily sales goal.
- Hitting a daily profit goal.
- Posting on social media

What is important enough to you that you can commit to doing it every day? If you know what that might be, start keeping track of how many days in the row that you successfully do that one thing.

Can you get to 100?

Remember, small daily wins create cumulative success.

The BIG DOMINO

What is a BIG DOMINO? ⁸⁶

Imagine something so massively important that if it happened it would make an incredible impact on the success of your business. It is that huge.

It changes the industry. It puts your company on the map. People line up around the block to get something. If this thing hits, your business instantly has a positive change forever. It's ground-breaking.

What is that for your company?

Define your BIG DOMINO.

Start building it by drafting an Action Plan with laser-like mission intensity. Work on this daily. Not, *"when you find the time."*

6 Months From Now

Are you looking out six months from now and envisioning the future?

Will you need more staff? A bigger space? A new plan for something?

Six months from now, what's going on in the world? Will you be ready? Will that new website be functional? Will that patent be issued? How many episodes of your new podcast that you are thinking about developing would have aired?

What will be going on?

Write out your thoughts on what you are dreaming about. The goal here is to make that dream a reality. The first step is to pull it down from the air and describe it.

1 Year From Now

A year from now what do you think your top-line sales will be? What will your profit margin look like? How many commas will the bottom line profit number use?

Are you thinking about this today? Does it seem too far away?

One year is about 250 working days away. If one person spent 8 hours a day working, that's about 2,000 hours. Does 2,000 hours seem like a large or small number for the amount of work that you need to crush your goals a year from now? Multiply that out with your total number of team members committed to the work.

How many of those hours are you going to commit to achieving your BIG DOMINO idea?

What is the percentage of completion of your yearly goal? Track that daily.

What you measure gets achieved.

18 Months From Now

In eighteen months from now, you are only going to have six months left to achieve the 2-year goal that you set. Six months can go by in a blink of an eye.

What landmark are you going to set for this 18-month mark?

Can you commit today to work on that daily? For example, eighteen months is about 540 days. If you committed to walking only 2.5 miles per day, you could walk from Los Angeles, California to Dallas, Texas which is about 1,240 miles away.

You don't have to make a huge effort. 2.5 miles a day is an easy stroll for most people. We aren't even talking about running. It is the cumulative effect of the small victory that gets you there.

Can you map out your daily route to get to your landmark destination to hit it eighteen months from now?

24 Months From Now

Two years. That's what was outlined at the beginning of this book.

Outline your goal. Plant that flag on top of your own Mt. Everest. This is the victory you want to claim for your new business plan and direction.

From exactly today, what will the date be two years from now? Look it up. Break out your calendar and get that sucker highlighted.

Then, work backward. Get these reminders built to give yourself accountability for achievement. Use the Daily Worksheet to build more accountability reminders that will pop up automatically.

If you want something incredible to come true two years from now, you need that accountability to make it happen. Shine the spotlight on your progress. There will only be three scenarios that could come true:

- You are not on schedule
- You are on schedule
- You are ahead of schedule

Chapter Nine: Action Plan Checklist

Let's face it, there is a lot of work ahead of you to build out what you need to accomplish. To make the business work, there are a few key areas that you should create mini-action plans that will serve the overall new direction for the business.

We want to be thinking about these areas:

- Goals
- People
- Product or Service
- Processes
- Marketing
- Sales
- Strategic Planning

In the following sections are templates that you can use to create Action Plan Checklists to rethink your business, stay organized, and push forward. Modify these to suit your needs best.

In these seven areas, you need to start creating a way to organize your thoughts on what needs to be accomplished. What do you need? Who is going to do the work? When is the deadline?

There is a reason why pilots, surgeons, and other highly trained people use checklists. Because they work. However, someone has to create them. Right now, that someone is you. (or your team)

SMART Goals

Specific
Measurable
Achievable
Realistic
Time-Bound

Use this SMART Goal Worksheet to define the SMART Goals that you need to set to ensure the crucial each Action Step for your business are handled properly and on-time.

[Get the SMART Goal Worksheet](#)

Goals

“A goal without a plan is just a wish” - Antoine de Saint-Exupéry

You aren't wishing, are you? I'm sure you want your goals to come to life, and that's what this next section is about. Of course, this book can't do the work for you, but we can set up a way to define with clarity what needs to happen.

To do that we want to use the concept of a SMART Goal.⁸⁷ You may have heard of this before. A SMART Goal is an acronym for Specific, Measurable, Achievable, Realistic, and Time-Bound.

For each step along the way to achieving your ultimate success, there will be smaller goals that you need to work on and complete. Using the SMART Goal format is an excellent way to define what needs to happen and why.

Goal in Mind

What do you need to accomplish?

Hit a sales number? Build out a lead generation tool for your sales team? Develop an innovation or test out a new marketing tool?

Goals are how we define what we need to do. Your business plan that you developed was put together at the 30,000-foot level. SMART Goals and the implementation of the work developing them are what you need to make them work.

This section on the SMART Goal Worksheet is simply for you to write out what you want to accomplish. What is your intention? The details come underneath.

Specific

Specific means exactly that. It is not a general feeling, or some wishy-washy statement like, *“Sell more”* or *“Make it work better”* or *“Hire a sales guy.”*

Specific would be:

- Have \$253,000 in sales with a 52% profit margin with six new accounts.
- Increase efficiency by 23% by implementing the new production process outlined with the process map outline.
- Hire a proven sales leader with at least 8 years of industry experience, an MBA from an accredited top 30 business school, and a proven sales record of at least \$2.5 million in sales annually.

The difference is obvious. For your goals, use the SMART Goal Worksheet and state your intention as Specifically as you can with language that focuses on what you want to achieve.

Measurable

For anything to stick we need accountability. This means we need to be able to quantify or measure the outcome.

It is a number. A data point. Pass or fail. Some piece of information that matters so the Judge on the team can ascertain if we have hit the mark or not.

For example:

- In sales, how many orders per day, week, or month do you need to hit that \$253,000 goal? Also, define how the profit margin information is calculated.
- For production, citing how the group is measuring and how the 23% increase is defined? What was the original number and the new number? What is the time period for measuring? How do you know it is accurate?
- For hiring, how many applicants are responding? Being interviewed? Offered the position?

Remember, *“you can’t manage what you don’t measure.”* Having data points when you are working on a goal is an easy way to gain clarity as to how you are doing in the process.

What is a good number? What is a bad number? Define those.

For your goals, use the SMART Goal Worksheet and define how you are measuring to comprehend progress toward your stated goal.

Achievable

Can you do it? Plenty of people bite off more than they can chew. What is reasonable? Don’t push out goals that can be completed too easily. What is going to really make a difference?

For example:

- In sales, what makes sense? A \$253,000 goal might be a lot of money to one company, but a drop in the bucket to a company like Google. Use historical data, research, or other information to guide you.
- Will a 23% increase in production be achievable? How long does something take now? What is the current efficiency rate?
- For hiring, getting a top candidate to interview might be easy for a Wall Street Hedge Fund manager, but problematic for the corner deli.

Be sure to list how you are arriving at your goal. Why do you think whatever you want to do is something within reach? Is it realistic within the context of time, skill, financial resources, experience, equipment, or other means?

List why you think the SMART Goal is Achievable based on your current situation. Provide details.

Realistic

Does your SMART Goal align with other ideas or tasks that you are currently working on building?

Is this something that Realistically you should spend the time, energy, and financial resources pursuing? It is fantastic to want to make new improvements, but how does this goal fit in with other priorities?

For example:

- Looking at projections, the new website won't be finished for several more weeks which puts the \$253,000 goal in jeopardy. Maybe a better goal to spend time and effort with would be the online store development instead.
- A 23% increase in production sounds interesting, but sales have overbooked the company by 223%. Adding another shift or contracting work out could be a better solution.
- Your ideal candidate is interested, but based on the qualifications is demanding compensation more than twice what you can afford. What would be the realistic compensation package that your company should offer?

Shooting for the moon is great, as we all want the best we can achieve. However, SMART Goals work better when what is Realistic is defined in the goal. What are the limits or parameters? Define the range.

Time-Bound

When does it have to happen? Here's where our favorite tool, the calendar, gets to make its way onto the team.

On a certain day? By a certain time? The more detail you include, the better your team can function as they know the rules.

For example:

- For sales goals, can you set them per day, week, month, quarter, or year? In our example, the \$253,000 goal is for the end of the current month. That's \$63,250 in sales per week, or \$12,650 per day, or \$1,581.25 per hour for an eight hour day.
- For production efficiency, this could work the same way. By the end of the month, the average production rate will be 23% higher than the previous month last year.
- In hiring, you could also state when the job opening becomes available and when it closes. When will the new hire start?

For SMART Goals, people want to know “When?” something has to happen. It helps anyone working on the goal to understand the deadline and be empowered to make decisions to achieve the goal on time.

For the SMART Goal for this worksheet, get the times and dates in place for when something has to happen. Not just the end date, but when to start and maybe a benchmark for something in the middle.

SMART Goal Wrap Up

For the three examples that we have used, the complete SMART Goal sentence for each could look like one of these:

- Have \$253,000 in sales with a 52% profit margin with six new accounts by the end of the month. This will be a 12% increase from sales from the previous month. The new marketing video series will coincide with this sales push and be the lead generation tool for qualified leads that will come from the free webinars offered. The benchmark goal will be to hit \$63,250 in sales per week.
- Increase daily efficiency rating for the production teams from 10% to 33%, (a total of 23%) by implementing the new production process outlined with the process map outline. In the test group, they achieved a 42.3% efficiency increase in the trial period. Based on the previous date, skill levels of production teams, the complexity of work, the average increase goal should be attainable with managerial support and employee training.
- Post a new job position for 30 days and have at least 20 qualified applicants, and then hire a proven sales leader with at least 8 years of industry experience, an MBA from an accredited top 30 business school, and a proven sales record of at least \$2.5 million in sales annually. The projected salary range will be our standard senior salesperson role but will be increased by 22% due to market conditions and pressures. The position needs to be filled by the first of next month, and on-boarding should commence by the fifth.

Of course, these are generic examples but I am positive that you can understand the need to write them this way.

They answer the basic questions of "Who," "What," "Where," "When" and "How."

Action Plan

You want to link the One-Page Action Plan, with the SMART Goal Worksheets and then create an overall Action Plan for getting the work handled.

There are plenty of software tools available in the marketplace that can help you with this, but if you want to simply use a standard templated spreadsheet I have created one for you.

You can use the spreadsheet in Google, or print the form and fill it out by hand.

Action Plan Spreadsheet

Need some help creating a checklist for actions with assignments and due dates? Use this!

[Use the Action Plan Spreadsheet](#)

Action Item

What do you want to get handled? Write it in this cell. Short and sweet.

Person Responsible

Who is on the line for accountability? List their name here.

Start Date

What day do they need to begin? This is important because maybe they can't start until something else happens. You still want to record the Action Item for full awareness.

Due Date

This is the deadline. Your team will be working with this as the day it needs to be accomplished.

Required Resources

What do they need to begin or do the work? This could be tools, training, equipment, certifications, some other task completed, payment, or anything else that would help or trigger the work.

Potential Blockers

This is critical to consider. What will be the friction points, roadblocks, or problems that might impede progress? What are you doing about them?

Notes

A simple area to jot down any extra information or thoughts.

Chapter Ten: Pulling It All Together

You have accomplished a lot so far. Make sure you take a moment to celebrate that. It is important that while you are working on this journey, that you take time to reflect on your progress and the work that you have put in.

Not everything will go as planned. You are going to stub your toe, or make mistakes. That's ok. Allow yourself to have permission and the freedom to not do everything right all the time.

One great quote on this comes from famed humanitarian Nelson Mandela. He said, *"I never lose. I either win or learn."*

This is a fantastic attitude to have for building a business. Things will never go your way 100% of the time.

In this last chapter, I want to share some best practices for you to help you craft your next normal. These are factors that can influence the outcome of the work that is ahead of you.

Let's start with the most important. Your Customer.

Customers

For a business to thrive, it needs customers. But as you already know, not all customers are alike.

There are dream customers. The ones that will happily pay you whatever you charge and help you bring in more of their friends that behave just like them.

Sometimes there are good customers. These are the ones that buy from you and continually come back for more. They aren't quite at that top level yet. But they could be.

There are bad customers. These are the folks that are not in alignment with what you do, offer, or provide. They generally need a lot of hand-holding, and without a doubt always want it cheaper.

Lastly, there are people who absolutely will never be your customer. Ever.

While there isn't really a way for me to look into a crystal ball and see your customers, you know that you could break these down into these groups.

Here's some homework for you. If you have access to your sales history and can download into a spreadsheet, run this report. Pull up the last three to five years of sales. I realize that this book is about pivoting and doing something different with your business, but I want you to understand some basic consumer math.

This absolutely works. In any industry, and for whatever you sell. Got the spreadsheet? Good.

For each customer, rank them by sales with the top customer at the top and the bottom customer at the bottom. What you will find is that the top 20% of your customers provide you with 80% of your top-line revenue.

So if you have 1,000 customers, 200 of them gave you the lion's share of your money.

Out of the 1,000 customers, 800 of them are only responsible for 20% of your revenue.

This is not something new. It's called the Pareto Principle and is also sometimes nicknamed the 80/20 Rule.

Why is this important? Look at the four types of customers cited above. Which do you think fit into that top 20% category?

Sometimes "*Less is more.*" More customers aren't the goal. More profit is. When you are building out your goals, action plans, and work with your new ideas keep this in mind. You can't, and certainly don't want to, serve everyone.

In the sales process that you are building, your focus should be on directing your energy, resources, marketing, technology, and effort into cultivating that top 20% of raving fans of your business.

Marketing

Marketing is the act of creating a customer.

With your new idea in hand, what are you going to do to create that opportunity? Remember, people don't want to be sold, but they want to buy.

What emotions will they feel if they buy from you? 89

- Happiness
- Adventure
- Joy
- Relief
- Trust ⁹⁰
- Belonging
- Safety

Your marketing needs to be 100% about the customer. They are the heroes of their own stories. In their eyes, what will trigger that purchase or connection with your business and what story will they be able to tell? ⁹¹

- That they are a member of the tribe?
- That they finally did it!
- That they solve a huge problem - FINALLY!
- That they found peace
- That they contributed to the greater good
- That they are happy
- That it was easy
- That they are proud of themselves?
- That they did something that mattered
- That they belong
- That they are secure

What stories will they tell their friends about your company, product, or service? Can you help with that? Imagine how much easier it will be to grow your new business idea if those top 20% customers, those raving fans, are spreading the word and getting their friends to buy from you? ⁹²

Being remarkable means that you have to be dialed in enough with the awesomeness that other people will talk positively about you. That's what you build. The five companies I cited earlier, Apple, Amazon, Tesla, Google, & Disney, don't you think they have that going for them?

Before you start launching your Instagram stories, Facebook posts, or other marketing tactics, stop and think about how your new business idea will connect with people on an emotional level.

Then, there are only five things that your customers want to know. Use this to create any marketing campaign or social media post:

1. What does the customer need to understand?
2. What can this help achieve?
3. Why is it important?
4. How will they feel?
5. What do they need to do right now?

Processes

If you knew me personally you would know that I am a process-oriented person. It's how I think.

From Stephen R. Covey's fantastic book, "The 7 Habits of Highly Effective People," is one of my favorite mantras:

"Begin with the end in mind." 93

That's how I have run other people's businesses, that's how I run my own business, and that is how my DNA is built.

I always ask myself, "*What does success look like?*"

What is the end goal? Can that be formed from some loose idea into something tangible?

For you, that is where you want to be twenty-four months from now. That 2-year goal. To be able to achieve that with effectiveness, start by creating processes.

These do not have to be overly complicated to be effective. In fact, if you really want them to work well it pays to make them as easy to achieve as possible.

Business coach Mark Coudray breaks it down into an acronym called CPR. ⁹⁴

What we are searching for in a good process are only three things:

- **Consistency**
- **Predictability**
- **Repeatability**

Consistency means that you stick to it. It is the standard.

Predictability means that your team can count on it happening the same way every time.

Repeatability means that it is built to be always the same, and it is easy to do.

For example, think about your quoting process. What do you think will happen if your sales team uses different ways to construct a quote or proposal to a client? Bill does it one way, but Maria handles the same type of order another way. Soon, everyone is confused and customers won't be happy.

Instead, build your process so Bill and Maria are using the same tools, the same way, and will produce the same result. It shouldn't matter who handles the actual quoting work, the process will dictate the outcome.

James Clear writes, *"Goals are about the results you want to achieve. Systems are the processes that lead to those results."*⁹⁵

Years ago, legendary college basketball coach John Wooden would spend a few minutes at the beginning of the year teaching his new players how to put on socks.⁹⁶ He taught them exactly how to do it with his process.

Why did Coach Wooden spend time teaching people a basic task that everyone that has ever worn shoes already knows?

Simple.

He wanted to illustrate that there was a "right way" and a "wrong way" to do everything. Just because you may have had experience doing something, doesn't necessarily mean that you are doing it correctly. Or the way that the process dictates.

Which is how Hall of Fame player Kareem Abdul-Jabbar discovered the process of how to put on socks. Because Coach Wooden taught him.

Consistent. Predictable. Repeatable. 97

With your company, define your processes and teach your team “your way” of doing everything. Bill and Maria need to know how to “put on their socks” with the quoting process. It is your daily commitment to your process that will determine your progress. 98

What processes do you need to map out to get the results that you need?

The Need for Follow Up

In most businesses, the typical salesperson or process gives up too early. Take a look at this:

- Your Sales Lead Starts Here - this is where they first learn about your business. It could be from something you posted on social media, or they happened to land on your website.
- Contact #1 - 50% of salespeople give up here.
- Contact #2 - 65% of salespeople have given up.
- Contact #3 - 79.8% of salespeople have given up.
- Contact #4 - 89.8% of salespeople have given up.
- Contact #5 - Here's where you become a factor in your prospect's mind.
- Contact #6 - Nurturing slowly, your lead gets to know you.
- Contact #7 - You are earning top of mind awareness.
- Contact #8 - You are probably the only person to make 8 contacts with them.
- Contact #9 - At this point, if your lead is ready to buy you have a 90% chance of being called.

- Contact #10 - You've closed the deal, but keep pushing information and help.
- Contact #11 - They are probably starting to refer others to you.
- Contact #12 - Here's where they buy from you again.
- Contact #13+ - They are a raving fan. This customer can't wait to bring others into your world.

What does this mean?

It means that you should effectively market your business to others on a continual basis. ⁹⁹ Build a database and consistently send helpful information and messages. Be present on social media and get engaged with your audience. Be present in your business communities.

This is not a constant sales pitch. Be fun. Show your customers using or happy with your product or service. Slow and steady wins the race.

Conclusion - You Can Do This

If there is one lesson that businesses have learned in the face of any emergency is that the unexpected happens.

Sometimes for small business owners everywhere, there are an onslaught of problems, heartbreak, uncertainty, and emotions to face. But as business leaders and entrepreneurs, it is in our blood to bounce back from this situation and rise up.

You can make your company better. Stronger. More resilient. More focused on helping customers. On being more profitable.

With innovation, hard work, creativity, and a little luck thrown in for good measure, you can do this. Do what's needed daily. Experiment. Analyze both successes and failures.

"Outcomes are what you get. Processes are what you do. Identity is about what you believe." - James Clear 100

Remember, stacking a lot of small wins will drive victory home.

What can you do today in the next hour?

By the end of the day?

What do you need to complete by tomorrow?

You got this!

One last quote. This is a gem from Teddy Roosevelt:

“It is not the critic who counts; not the man who points out how the strong man stumbles, or where the doer of deeds could have done them better. The credit belongs to the man who is actually in the arena, whose face is marred by dust and sweat and blood; who strives valiantly; who errs, who comes short again and again, because there is no effort without error and shortcoming; but who does actually strive to do the deeds; who knows great enthusiasms, the great devotions; who spends himself in a worthy cause; who at the best knows, in the end, the triumph of high achievement, and who at the worst, if he fails, at least fails while daring greatly, so that his place shall never be with those cold and timid souls who neither know victory nor defeat.” ¹⁰¹

Acknowledgments

First, I'd like to thank my family. My wife Jody and son Jack are my motivation. Thank you for your love, support, and constant encouragement. *"No, you are not interrupting me."*

Secondly, I want to thank the few select people that I sent the rough draft to for their feedback. Their suggestions made this book more impactful, and much better.

- Jody Atkinson
- Tim Atkinson
- Stephen Kroul
- Mark Coudray
- Tom Rauen
- Shane Snodgrass
- Alan Howe

Their detailed, candid suggestions made this manuscript better. Whether on the phone in a discussion or with written comments their insights were incredibly valuable. Thank you from the bottom of my heart.

I also must give a huge shout out to the authors of the two books that I have used as the keystone to this piece. Roger von Oech for his incredible book, *"Whack on the Side of the Head"*, and Michale Michalko for his work, *"Thinkertoys"*. Years ago, I read these books and have been using the various techniques included inside as cornerstones of my creative process.

Who knew then where their influence and inspiration would lead?

And lastly, I want to thank you. I appreciate you purchasing this book and the monumental effort it takes to get better. You are the hero in this story.

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Mesa, AZ-based Marshall Atkinson is one of the leading production and efficiency experts for the decorated apparel industry. He is the owner of Atkinson Consulting, LLC.

As a coach, Atkinson focuses on operational efficiency, continuous improvement, workflow strategy, business planning, marketing, employee motivation, management, and sustainability.

He is a frequent trade show speaker, article & blog author, and is the host for the YouTube show for Jerzees [“Adventures in Apparel Decorating”](#).

Atkinson has authored five books to date: [“Top 10 Workflow Tips”](#), [“Shop Basic Info Pack”](#), [“Price for Profit”](#), [“T-shirt Texture Tricks”](#), and “Moving Past Disaster”.

In 2020, he released the first in a series of online learning courses. [“6 Steps to Kill Your Production Downtime”](#) which focuses on eliminating costly production downtime for the decorated apparel industry with several easy to implement lessons. An online course and private coaching for the lessons in "Moving Past Disaster" will be available early summer 2020.

The eBooks, online courses, as well as his shop coaching plans and several hundred blog articles, can be found on his website at <https://atkinsontshirt.com/>.

Atkinson also co-founded a decorated apparel industry sales and marketing education company called [Shirt Lab](#), with industry entrepreneur Tom Rauen.

Marshall lives in Mesa, AZ with is wife Jody and son Jack.