

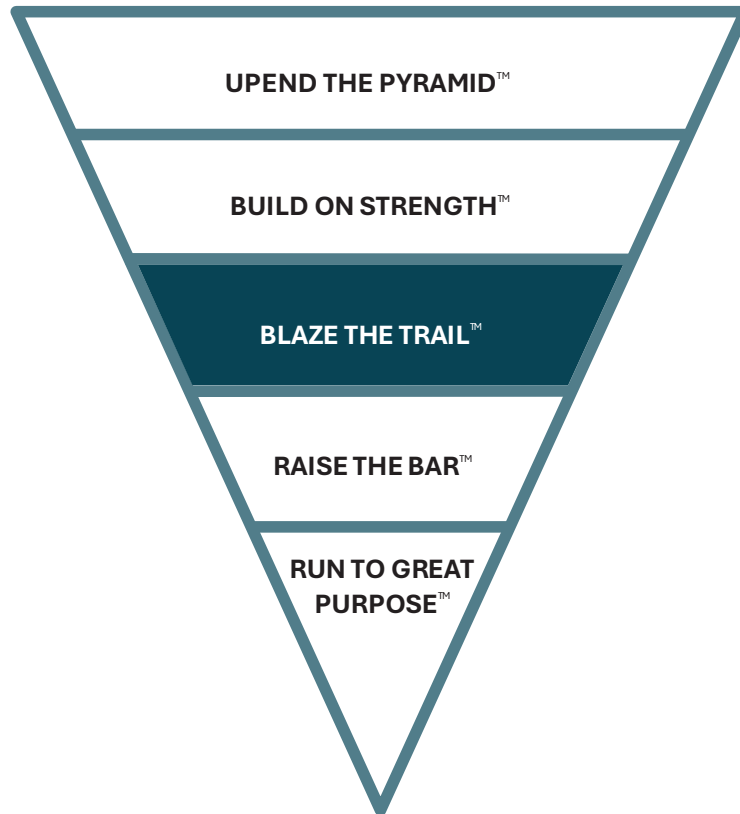


BLAZE THE TRAIL™ WORKSHEET

Build a Culture of Success

BLAZE THE TRAIL™

Serving leaders BLAZE THE TRAIL™ by providing the support and the disciplined focus on key success factors that team members need in order to succeed. Through this action, leaders teach every team member how to deliver real value to the customers being served.



At the heart of serving leadership is clearly showing the way. Serving leaders prepare the team to follow the trail that was originally blazed by the founder in pursuit of the results that matter most. BLAZE THE TRAIL™ answers the question **“What?”** What is our mission? What do we accomplish that matters most to the people and the customers we serve?

BLAZE THE TRAIL™ Applications:

- Clarify Your Organization’s Success Factors
- Teach for Success
- Remove Obstacles and Waste



BLAZE THE TRAIL™—Overview and Applications

BLAZE THE TRAIL™ ensures that all activities provide real value to those being served. Founders of organizations are pioneers, going places where there is no path. They find the way to build the organization, create a new product, or provide a service that is needed by those they serve. They often learn by trial and error the things that provide great value to those they serve and remove obstacles from their path. They understand what makes their mission unique and special or the “secret sauce” of what they do. As they journey, they mark a way or “BLAZE THE TRAIL” for those who follow. Serving leaders clearly identify the path that needs to be followed to ensure the success of the organization, make sure each person knows exactly what they need to do, and remove any obstacles that block the path.

BLAZE THE TRAIL™ answers the “**What?**” question. What do we do that brings the greatest value to those we serve? Do we know what our customers/members value? What is the mission we are seeking to accomplish?

Clarify Your Organization’s Success Factors

The serving leader makes sure that everyone in the organization understands what it is that they do to bring the greatest value to their clients, members or customers. They are willing to ask questions and seek feedback from those they serve to make sure they stay on the path that will bring success.

The **Success Factors Discovery Tool** will guide you in finding what makes your organization successful and defining or refining your mission statement.

Teach for Success

The serving leader is committed to help every person know what they need to do to contribute to the mission of the organization. Teaching is required when the person does not yet understand how to do the process or service that is critical. (Coaching is required when the person understands what to do but is not doing it. We looked at this in RAISE THE BAR™).

The **Success Factors Teaching Planner** will guide you in teaching people how to perform duties that are critical to your success.

Remove Obstacles and Waste

When the mission is clear, the serving leader is diligent to remove any obstacles that keep people from staying focused on what really matters to the organization. They identify obstacles and waste and find ways to eliminate them as much as possible.

The **Lean Customer Serving Planner** will guide you in identifying areas of waste and removing them.



Clarify Your Organization's Success Factors

Success Factors Discovery Tool

Instructions/Preparation:

Are you able to articulate exactly what it is that your organization does that creates value for your customers? Can you describe your “secret sauce” (the unique value that you bring to the world) that makes you special? Making about your unique value proposition clear is the first step in defining your mission and staying on track to achieve Great Purpose.

How do you clarify what your customers value the most? It's simple. You ask them! (Remember that your “customers” might be clients, members, or volunteers.)

This three-part **Success Factors Discovery Tool** will help you discover what it is that your customers value the most, and then evaluate whether your current mission statement is focused on that - or if it needs to be strengthened. Either way, clarity on your mission will be cause for celebration.

The tool begins with Customer Value Discovery Plan that you will use to complete the exercise, followed by an assignment to actually interview your customers, Customer Feedback.

You will want to pause at that point and allow yourself plenty of time to set up and conduct your customer interviews. This step is very important in order to gain the most value from this tool.

Then, you will complete the tool with part 3: Clarify Your Mission Statement, an exercise assessing the clarity of your Mission Statement.

If you have a current mission statement write it here:

Who are your “customers”? (You may use another word like patient, client, member, etc.) Write who your customers are below:

Current Thoughts

Take some time to consider the following questions. Write your answers based on what you think today - prior to conducting your customer survey or interviews.

- What do you do that brings the most value to your customers?
- What is the main problem you resolve for your customers?
- What do your customers do with your product or service?



Clarify Your Organization's Success Factors

Success Factors Discovery Tool (continued)

Part 1: Customer Value Discovery Plan

Use the outline below to create a plan for clarifying your success factors - what your customers value the most. For each customer, note the specific questions you want to ask (choose from the sample questions below, or make up your own), the action you need to do to arrange for the conversation, and when you plan to complete the inquiry. Your plan may include interviewing the persons directly or sending them a survey to complete. Where possible, direct interviews are more helpful.

Customer	Discovery Questions	Action	Timeframe



Clarify Your Organization's Success Factors

Success Factors Discovery Tool (continued)

Sample Questions:

Current Customers

- What is the number one reason you are doing business with us?
- What is the main problem we help you resolve?
- What do we do that resolves this problem?
- What is the one thing you need us to do better?
- What is the one thing that would cause you to quit doing business with us?
- What's the most important thing you would want to share about us if asked for a reference?
- What do we do that causes frustration?

Customers Who Left Us

- What was the main reason you quit doing business with us?
- What was the most important deciding factor for choosing your current provider?
- What do you like most about doing business with your current provider?

Potential Customers

- What do you value most about your current provider?
- What is the one thing you wish you were getting from your provider?
- What is the main reason you have not chosen us as your provider?
- What is the most important thing we could do that would cause you to choose us as your provider?

You will gain the most value from this Success Factors Discovery Tool by pausing here and conducting your customer survey according to the plan you have created in Part 1. Allow yourself plenty of time to complete the plan.



Clarify Your Organization's Success Factors

Success Factors Discovery Tool (continued)

Part 2: Customer Value Feedback

After you have received the feedback from your customers, answer the questions below based on what you discovered from their responses.

- What do you do that brings the most value to your customers?

- What is the main problem you resolve for your customers?

- What do your customers do with your product or service?

Are there differences between what you thought your value proposition is, and what your customers are telling you? If so, what are these key differences?

Based on what I heard from my customers, what do I do that brings them the greatest value? (List two or three things that they most value.)



Clarify Your Organization's Success Factors

Success Factors Discovery Tool (continued)

Part 3: Clarify Your Mission Statement

Write your current Mission Statement if you have one:

Evaluate:

Based on what you learned from your customers, how well does your current Mission Statement reflect your critical success factors?

- Very well
- Somewhat
- Not at all

If your current statement reflects very well what you heard, congratulations, you have a great Mission Statement!

If it doesn't, consider that the marketplace may be asking you to shift your focus - and thereby shift your Mission. This clarity is cause for celebration. Work on refining your Mission Statement below until it clearly articulates your secret sauce - the unique value you bring to the world.

Refining your Mission Statement

(Write a new or revised Mission Statement here)

When you have finished, note what next steps you need to take in response to new insights about your Mission Statement. Do you need to discuss with other leadership team or board members?

Create a plan to introduce a new Mission Statement?

My next steps will be:



BLAZE THE TRAIL™--Action Planner

Instructions:

Reflect on what you have learned in this lesson and the application exercises you have already worked on. Summarize your key learnings:

After this lesson, I plan to take the following actions:

2.

3.

Accountability: Who will I ask to hold me accountable for these actions?

Name:

Mark here when you have asked them: