



# PIVOT

E-LEARNING SERIES

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## WORKBOOK





# VALUES AND GUIDING PRINCIPALS

## WORKSHEET | 40 MINUTES

This page drives or contributes to many areas of your business outreach.

**B Guiding Principles**, what business must always be (self-evident & objective). These will never change overtime, no matter what. They are the backbone of what makes the business tick. Principles govern how the business behaves and interact in various situations, often with a firm and consistent stance. Share these with your staff and ensure they are followed.

*How do these get used? Principles are often a reference point in determining goals and values, while also helping to outline a staff/business mantra that does not change. Limit to 15.*

*Example: Forward thinking, industry leading, unsurpassed expertise, full transparency.*

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| 2 | 10 |
| 3 | 11 |
| 4 | 12 |
| 5 | 13 |
| 6 | 14 |
| 7 | 15 |
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**C Core Values**, what we want our business to be (internal & subjective).

*These are fluid and often change as time passes depending on how opinions change as they relate to ideas or issues. These may be swayed or influenced by certain conditions or the state of the industry and may change as the environment demands, or needs change.*

*How do these get used? Values are often the mantra that is used when looking at all key contact methods with customers.*

*Example: We have an undying need to please all customers regardless of the issue they present being fully transparent. Note "fully transparent" is one of the guiding principles that can never falter, but the unyielding need to please all customers may change based on the market and industry. Need more space, turn over the page and keep going!*

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### GOOD TO KNOW

These set the stage for many other areas of your business which define a clear direction!

# SWOT BUSINESS ASSESSMENT WORKSHEET | 5 MINUTES

This exercise offers great insight into what is working and what is not. After these have been identified, explore the positive section of the SWOT analysis (Strength and Opportunities) to gain a comprehensive snapshot what you do well, and the potential for growth side (Opportunity and Weaknesses) for changes you can make. This will help to feed into the main key words to see if they need adjustment or if they still ring true. We will use these to work on forming a strategy to action plan in the next sessions.

**Be General:** Don't be aspirational with how you want your business to be - be completely honest about it. Don't get bogged down with details use simple bullet point thoughts.

**A** List your businesses/organizations **keywords** completed in the previous activity.

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**B** Define an **objective** for how you will look at the SWOT.

*What do you want to get out of this exercise? Select all that apply and remember these when you are working through the SWOT sections. you can refer back to these if you get stuck.*

- A better understanding of the whole your business
- Understanding what you do well so you can focus on those traits in marketing initiatives
- Defining opportunities for your business to change/grow/adjust
- Realizing threats and how you can modulate a revised way of looking at this
- How does a consumer perceive your business
- Identifying what your customers maybe don't know about you

Other:

**C** Understanding how **SWOT analysis** works.

- S** Strengths – Internal company competencies or attributes which are successful for your business
- W** Weaknesses – Internal obstacles that impede business from being as successful as possible
- O** Opportunities – External opportunities or trends that can be integrated into your business
- T** Threats – External challenges that can/do jeopardize current or future success for your business

**E** After SWOT, does your businesses/organizations **keywords** listed above still represent you (see example below)?

- YES** - Great work!
  **NO** - That's okay this is an opportunity to refine!

*For example: If you listed the keyword Expertise to define your business and set you apart, but lack of knowledge is in the Weakness or Opportunities section, that isn't the best word to represent your business. Take a look at the S O part of your SWOT ans see if maybe another theme emerges. Then, go back and review your keyword worksheet and select another word you had that best sums up that theme.*

# STRENGTHS, WEAKNESS, OPPORTUNITIES, THREATS

WORKSHEET | 60 MINUTES ⌚

**D** Complete the **exercise to** define what those words are for your business.

INTERNAL  
**STRENGTHS**

INTERNAL  
**WEAKNESSES**

EXTERNAL  
**OPPORTUNITIES**

EXTERNAL  
**THREATS**

# KEYWORD BRAINSTORM

## WORKSHEET | 60 MINUTES ⌚

*Key words are free based associations that allow us to define three distinct words that we can begin to work into communications. These three words, when used properly help to embed a brand into the unconscious human brain by ways of a retrieval set. It has been studied that when brands interact with people, they taking away words associated through messaging or visuals. They then classify three emotive words by the relevance they feel to their own life. Let's discuss what this looks like, and the importance of consistent key messages across multiple organizations.*



### SUCCESS TIPS

- Don't censor yourself
- Don't make a word fit
- Do use thesaurus
- Do think outside the box

- A** List words to encapsulate what your business is, in this **word association exercise?**
- Need help? Like individuals, traits given to brands draw people in. Words with emotive human personality traits allows the audience to easily identify and retain key words. Drawing a blank? Think of your business as a person, what they would sound like (happy, confident, pleasant), and think about how they would act (friendly, authentic). Traits such as these given to brands help viewers to identify and classify a brand.*

# KEYWORD REFINEMENT

## WORKSHEET | 40 MINUTES ⌚

**B** Select the best **key words you feel most fitting** to represent your business.  
Which ones make it and why?

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**C** Pick your top three (3) **key words**, be absolutely sure these are the best fit to describe your business.

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**D** What one word emotive word can you associate with your business? This will give you the **tone**.

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*These three words, plus your association word will drive your positioning statement and help you to focus your business efforts when identifying which of these words appeal most to your individual target markets.*

# POSITIONING STATEMENT WORKSHEET | 120 MINUTES ⌚

*You have developed your key words, but what does that mean for your businesses? How do we make it applicable to your tone and how do we make sure these words are integrated into a consistent message leading your marketing? Remember this is customer facing meaning customers read and relate to this.*

## SUCCESS TIPS

Try writing your statement and fitting in the key words

Write multiple versions

Make sure it is short, succinct, and relevant

- A** Write your **businesses/organizations communication keywords** (generalize for ease of exercise)

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- B** Combine these messages to get a few **succinct paragraph** or sentence with those three key words. Remember your tone and make sure you are using that tone to create these messages.

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- C** Write the message that works the best. This is your **positioning statement** or **elevator pitch**.





# CERTIFICATE OF COMPLETION

## PIVOT MODULE 1: BUSINESS BASE

This certificate is to congratulate you on your on-going efforts to better your business!

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for your contribution as a participant in the CBA's e-learning series PIVOT. Work that has been completed takes an estimated 7 hours to do. Congrats and we wish you the best of luck.

*Debbie Simmonds*

Debbie Simmonds - President



*K. Adams*

Krystal Adams - Executive Director