

FIX THIS NEXT



WORKBOOK | SAMPLE EDITION

WELCOME!

In this supplemental workbook for *Fix This Next* by Mike Michalowicz, you will identify your company's Vital Need, develop strategies to resolve it, and move your company toward your vision faster and easier than ever before.

TABLE OF CONTENTS

Executive Summary.....	3
How To Use The Fix This Next Workbook	7
Business Hierarchy of Needs	8
Sales Level Supporting Analysis.....	9
Profit Level Supporting Analysis	13
Order Level Supporting Analysis.....	17
Impact Level Supporting Analysis.....	21
Legacy Level Supporting Analysis	25
Master Tracker.....	29
The Fix This Next Process (Detailed)	30
The Fix This Next Process One Sheet Tear Outs.....	34
The Business Hierarchy Display Tear Out.....	49
Resources	50

EXECUTIVE SUMMARY

The biggest challenge business owners have is they don't know what their biggest challenge is. If you find yourself trapped between stagnating sales, staff turnover, and unhappy customers, what do you fix first? Every issue seems urgent – but there's no way to address them all at once. The result? A business that stays stuck in the Survival Trap, the endless circles of addressing apparent, urgent issues and prioritizing the wrong things.

In the Fix This Next Workbook, you will undergo a simple process to:

- 1.** Identify the most important need your business has right now: The Vital Need.
- 2.** Create a simple, measurable plan to fully fix the Vital Need using the OMEN Method.
- 3.** Track your progress as you permanently move your business toward your vision.

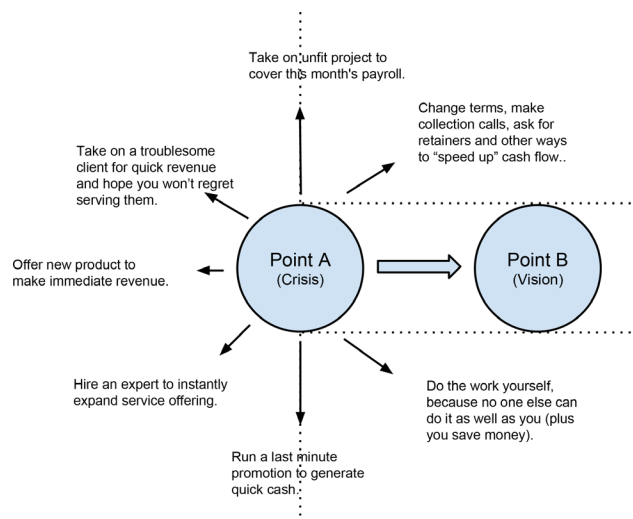
THE SURVIVAL TRAP

The statistics abound: 50% of businesses fail in the first 5 years. 83% of businesses never achieve profitability. 88% of business owners make less money than if they had the equivalent job at another company. 91% of business owners are actively trying to fix the wrong thing in their business 100% of the time. Etc., etc. etc.

The statistics are real, and so is the struggle. The question that begs to be asked is “Why?”

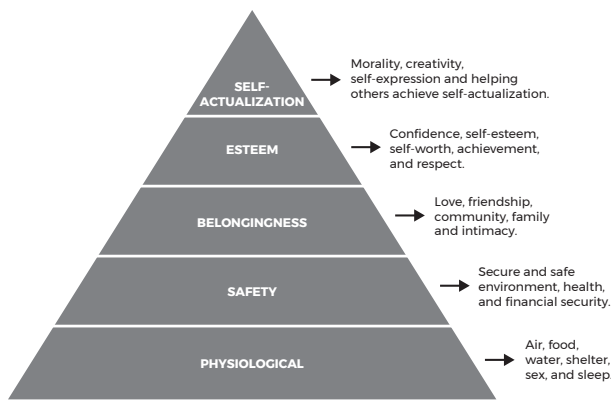
Why is there so much struggle among business owners? The easy, and obvious answer is “cash flow.” Data analysis shows that the vast majority of businesses close down because they simply run out of money. But the lack of cash is simply the final stage of a business collapse. Pointing to the lack of cash as the reason businesses fail, is the same as thinking a car stops moving because the wheels are not spinning. Yes, that is the final stage, but it is not the cause. It could be a failed engine, the gas tank could have a leak, there might not be a drive. To fix a stalled car (or businesses) we must address the cause, not a final symptom.

Businesses fail because they are doing the wrong thing. Or, more insidious, they are doing the right thing at the wrong time. A business may have a debt issue or a margin issue. A business could have an employee engagement problem or a client engagement problem. A business could have all of these at once. But even in a scenario where a business needs triage, we must always fix it by addressing its most Vital Need first. By pinpointing the Vital Need and fixing that next, we will be doing the right thing at the right time. And that is the only way to grow a healthy business.



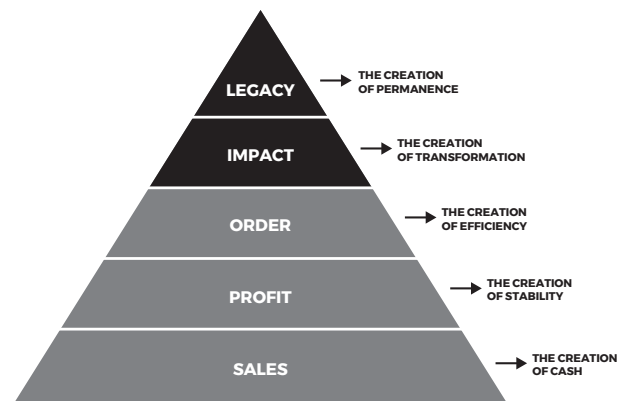
Yet most businesses stay stuck in the Survival Trap, a recurring pattern that prevents a business from moving forward. The experience is like this: We sense a problem, such as the lack of money at the company bank account. We react to the problem by immediately offering a discount in the hopes of drumming up sales. When that doesn't work, we run an ad for a “rain maker” sales person. And when that fails we try doubling our prices. And on and on it goes. Problem = action. Random solution = reaction. And the whole time the problem may not have been sales related but efficiency related.

The action/reaction response is natural for entrepreneurs, and it is not effective. We have an immediate problem in front of us, and we respond by doing something that we hope will fix the problem, immediately. It may or may not, but either way the fast “solution” gets us away from this problem momentarily, and we then put our attention on the next issue at hand. The Survival Trap is typified by taking actions that take us away from problems, only to experience similar problems the next day. We stay stuck in a continual cycle of problems and quick fixes for the entire life of the business. In other words, we stay stuck taking two steps forward, but three steps back.



MASLOW'S HIERARCHY OF NEEDS

Maslow created a hierarchy that explains how humanity prioritizes specific needs over others. The base need is physiological, then safety and so on. Only when a foundational need is satisfied can a person climb or aspire to serve other needs. If a foundational need is ever compromised, we automatically revert to the foundational need. For example, if you are out with a friend for dinner (the Belongingness level) and you start to choke on food (the Physiological level) you will automatically try to dislodge the food.



BUSINESS HIERARCHY OF NEEDS

In Fix This Next, Mike Michalowicz reveals the BHN. Similar to Maslow's Hierarchy, businesses have a specific hierarchy of needs that must be served. If foundational needs are skipped or ignored, the business is inherently compromised and won't be able to maintain healthy growth. When foundational needs are adequately served, then higher level needs can be addressed, driving the business vision.

EVALUATE THEN ACT

Most businesses stay stuck because the owner or leader(s) is reacting to apparent issues instead of identifying the most important singular issue the business needs addressed. The BHN is a tool that forces you to temporarily pause, evaluate, and determine the most important thing that the business needs next. Use this tool repeatedly.



PERMANENT, HEALTHY GROWTH WITH FIX THIS NEXT

The Fix This Next approach addresses problems in order of their impact on the business and with the consistent focus of moving in one direction, toward the company's vision.

If you feel you and your leadership team are constantly “putting out fires,” you are in the Survival Trap. If your business struggles to grow the way you envisioned, you are surely in the Survival Trap. Awareness is key. And now you know. The way out is via the Fix This Next Process:

1. **Identify the company's Vital Need**
2. **Fix it using the OMEN method**
3. **Track your progress toward your vision**

THE BUSINESS HIERARCHY OF NEEDS

The foundation of the Fix This Next process is the Business Hierarchy of Needs (BHN). The BHN is derived from long established and proven concepts (explain concepts of what). And it is simple to understand. But don't discount simple as ineffective. In fact, the BHN is foundational knowledge on how your company is structured. The BHN is effectively the DNA of your business, and is based upon Maslow's Hierarchy of Needs.

HOW TO USE THE FIX THIS NEXT WORKBOOK

The front section of this workbook is designed for your reference. It includes detailed instructions and processes, as well as a collection of supporting analysis questions for each Core Need. The back section of this workbook contains tear out worksheets for your use as you go through the Fix This Next Process.

Read through this entire workbook before you get started on your first fix, so that you have a complete understanding of the process. Then proceed with the following steps:

STEP 1: MAKE THE BUSINESS HIERARCHY OF NEEDS YOUR COMPASS

The Business Hierarchy of Needs (BHN) is a powerful tool that will keep you focused on addressing the most Vital Need of your business. Each time your business faces a new challenge or problem, use the BHN to determine where that situation resides in the hierarchy. Do not get distracted by working on new needs until the active Vital Need is resolved.

The BHN is a compass for your business, giving you direction for your company's "true north." It serves as a reminder to stop reacting to challenges, problems, and opportunities, and to start acting on the one thing that your business needs most now. Keep the BHN highly visible so that you focus on the next impactful thing and not the next apparent thing.

ACTION: Post a copy of the BHN above your work area so it is highly visible. A tear out copy of the BHN is in the back of the workbook.

STEP 2: CONDUCT A FIX THIS ANALYSIS

The Fix This Analysis (FTN) always follows the same three steps. First identify where the business's Vital Need is within the BHN. Then apply the OMEN method to plan a resolution to the Vital Need. And finally, execute on your Vital Need fix and track progress until its resolution.

ACTION: Conduct the FTN analysis on your business now.

STEP 3: TRACK YOUR PROGRESS

Use the included tracking pages in this workbook to record your progress on your resolution to Vital Needs.

ACTION: Once you have completed an FTN analysis, record the measurements in the Tracking Sheet. Execute on your plan and adjust when necessary, following the OMEN method.

STEP 4: REPORT AND REPEAT

Celebrate the wins you have in resolving a Vital Need. Document, resolve and readdress Vital Needs that don't get resolved as intended or expected. Put a small note on the BHN pinned above your desk, acknowledging the Vital Need you resolved. Over time the BHN will have a list of Vital Needs you resolved and be a record of your company's progress.

ACTION: Document and celebrate every time you fully address a Vital Need. Then repeat the process starting at Step 2. At the completion of the year take down the pinned BHN, write the year at the top, and pin a new BHN above your desk.

BUSINESS HIERARCHY OF NEED

Maslow's Hierarchy of Needs works naturally for us because we are "wired" into ourselves. If you walk down a dark alley, and you get a tingling sensation that something isn't right...something isn't. You should turn around quickly and get out of there. The reason is that our senses are wired directly into our body. Our cognitive inputs, such as seeing, hearing, smelling, etc. are wired into our nervous system. We are wired into ourselves and have strong gut sensations.

But unlike our human bodies, we are not wired into our corporate entity. Our gut instinct does not work in the same way and, alone, is not a good indicator of the next action to take. Our gut causes us to react to the apparent issues we can see immediately in front of us. But with the Business Hierarchy of Needs we have a guiding system to direct our instincts. It forces us to look at the entirety of our organization's needs, and to collect the data to analyze what our corporate problem is.



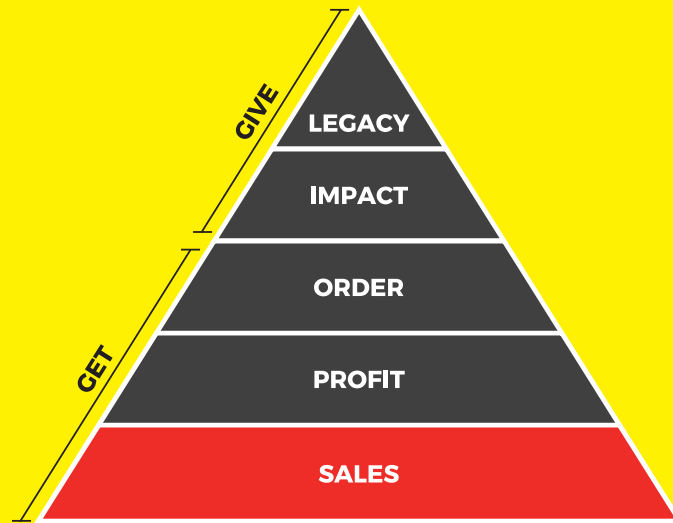
ACTION: Pin a copy of the BHN above your desk so that you have access to it at all times. It is your guide post. A large copy is at the back of the workbook for you to tear out and post.

FTN SUPPORTING ANALYSIS

The following section includes supporting questions for each of the twenty five Core Needs. This does not represent every possible question for each Core Need, so as you go through the process, add additional supporting questions that help you gain further clarity on each Core Need.

Use this section as a reference guide as you conduct the Fix This Next analysis and answer the Core Need questions. The goal is to answer these questions as factually as possible. The subsequent questions are designed to push clarity, utilize data and remove bias in the evaluation of the Core Needs.

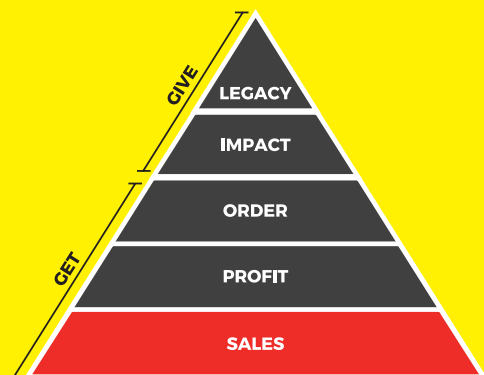
The more fact based your answers to the Core Needs are, the more accurate the analysis will be in finding your Vital Need.



SALES LEVEL

At this foundational level, the business must focus on the creation of cash.

Just as humans can't survive without oxygen, food, and water, if you don't have sales, your company will not be able to survive for long. Heck, without sales, you won't have a business at all. Addressing the five needs in the SALES level will ensure that your foundation is working solidly, and can support the next level, PROFIT.



SALES LEVEL



LIFESTYLE CONGRUENCE

Do you know what the company's sales performance must be to support your personal comfort?

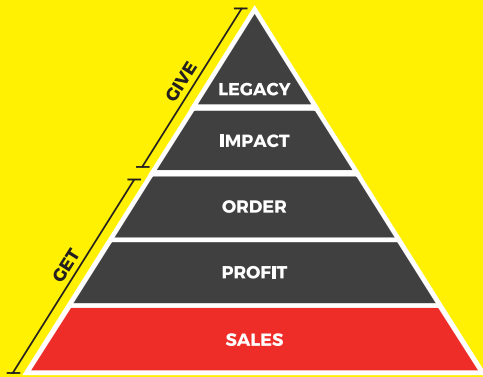
- ✓ How much monthly income do you (the business owner) need to maintain a basic, but comfortable lifestyle?
- ✓ How much revenue must the company generate to support your lifestyle?
- ✓ If you reduced expenses (including staff), what is the minimum monthly expense that the company can incur and still achieve the sales needed for Lifestyle Congruence.
- ✓ What percentage of annual sales make up your required target take-home income?



PROSPECT ATTRACTION

Do you attract enough quality prospects to support your needed sales?

- ✓ Have you identified the ideal prospect avatar?
- ✓ What percentage of your prospects are consistent with the avatar?
- ✓ Are there enough prospects to support the sales needed?
- ✓ What are your significant prospect sources (website, referrals, direct mailings, social media, etc.)?
- ✓ What volume of traffic do you bring to your source?
- ✓ How many applications or inquiries do you get from your prospects weekly?



SALES LEVEL



CLIENT CONVERSION

Do you convert enough of the right prospects into clients to support your needed sales?

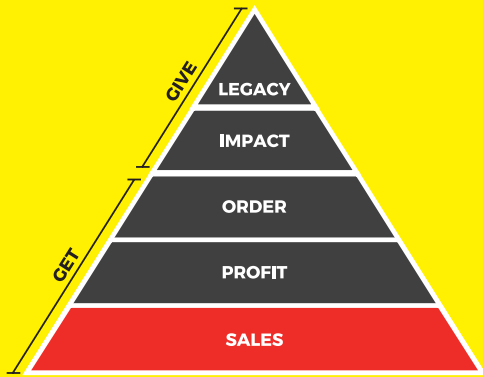
- ✓ Have you identified the ideal client avatar?
- ✓ What percentage of prospects become clients?
- ✓ What percentage of clients are ideal?
- ✓ What percentage of clients buy repeatedly?



DELIVERING ON COMMITMENTS

Do you fully deliver on your commitments to your clients?

- ✓ How consistently (on a percentage basis) does your company deliver its offering within specifications (time, quality, etc.)
- ✓ How often does your offering get returned or customers ask for a partial/full refund?
- ✓ How often do customers cancel their offer?
- ✓ How often is your service or product delivered later than the client expects?



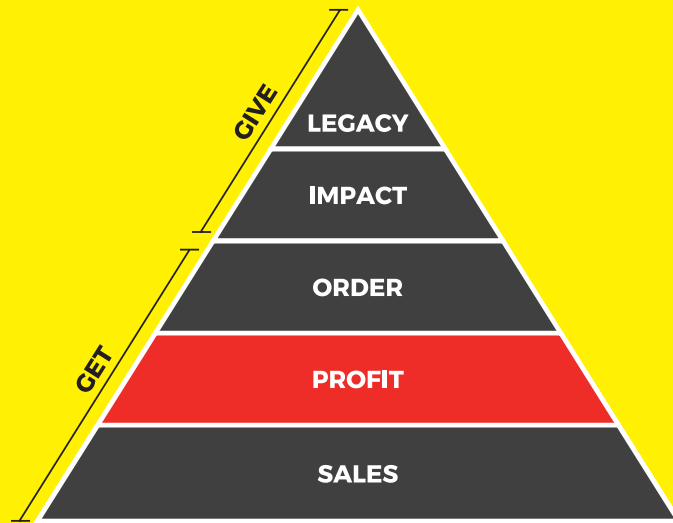
SALES LEVEL



COLLECTING ON COMMITMENTS

Do your clients fully deliver on their commitments to you?

- ✓ Do your clients pay on time and in full?
- ✓ How often are projects delayed because you are waiting for clients to send you information/images/copy/etc?
- ✓ What percentage of your clients (intentionally or not) cause delay to the project or compromise the quality of the experience?



PROFIT LEVEL

At the PROFIT level, the company's focus shifts to the creation of stability.

Here, our business's needs line up pretty closely with our human needs for health, financial stability, and a secure and safe environment. Massive revenue doesn't mean much when you have no profit, no cash reserves, and are drowning in debt. When all five needs in the PROFIT level are satisfied, you are positioned to scale your business without financial collapse.



PROFIT LEVEL



DEBT ERADICATION

Do you consistently remove debt rather than accumulate it?

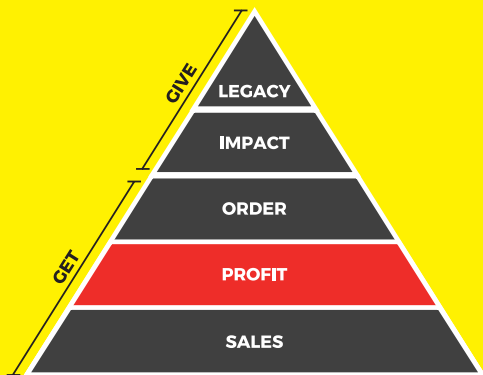
- ✓ How much debt does your business (and any shareholders) have?
- ✓ How much debt did your business (and any shareholders) have 3, 6, 9, and 12 months ago?
- ✓ How much interest was paid for debt 24 months ago, 12 months, 9 months, 6 months, 3 months ago and currently?



MARGIN HEALTH

Do you have healthy profit margins within each of your offerings and do you continually seek ways to improve them?

- ✓ What are your company's overall margin (gross profit as a percentage of income)?
- ✓ What are your margins for each product offering?
- ✓ What costs are necessary to support the delivery of the offering?
- ✓ With what frequency are offering prices adjusted to improve / maintain margin health?



PROFIT LEVEL



TRANSACTION FREQUENCY

Do your clients repeatedly buy from you over alternatives?

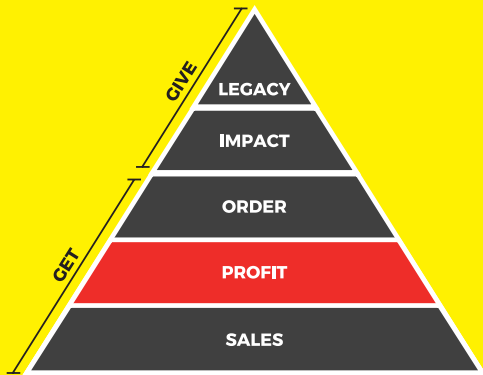
- ✓ What percentage of your clients buy from you repeatedly?
- ✓ If your offering does not inherently create repeating sales, what avatars buy from you most often?
- ✓ What is the average sales value per client?
- ✓ What is the value of a client over their lifetime?



PROFITABLE LEVERAGE

When debt is used, is it used to generate predictable, increased profitability?

- ✓ What is your ROI on borrowed money in 30 days, 90 days, 120 days?
- ✓ How long, on average, does it take to achieve this ROI?
- ✓ What process do you use to determine whether a loan is a good investment?



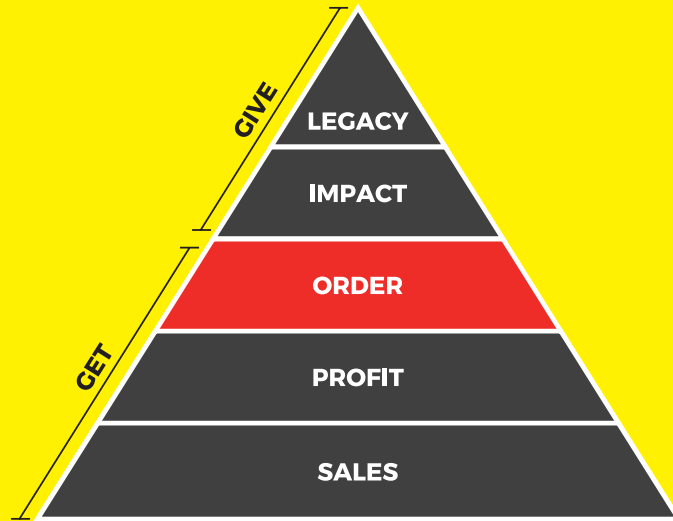
PROFIT LEVEL



CASH RESERVES

Does the business have enough cash reserves to cover all expenses for three months or longer?

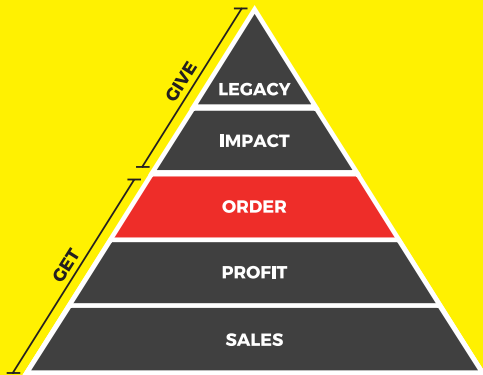
- ✓ What is the cost of running your business for 3 months?
- ✓ How much do you have in easily accessible cash reserves?
- ✓ Is the money only used for emergency situations?



ORDER LEVEL

At this level, the focus is on the creation of efficiency, and the needs are related to ensuring that everything runs “like clockwork.”

With all of its organizational efficiency needs met, your business can run—and yes, even grow—no matter who is on your team. It can even grow without you, the entrepreneur.



ORDER LEVEL



MINIMIZED WASTED EFFORT

Do you have an ongoing and working model to reduce bottlenecks, slows downs, and inefficiencies?

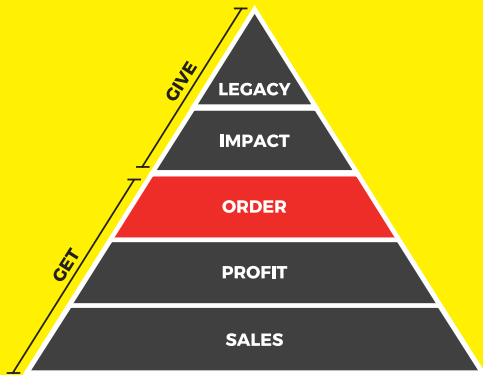
- ✓ How do you identify areas of the business that are experience wasted effort?
- ✓ Who makes decisions in relation to improvements to working processes?
- ✓ What is the weakest part of your process currently? How do you prioritize bottlenecks?
- ✓ What do you have in place to minimise bottlenecks and inefficiencies?



ROLE ALIGNMENT

Are people's roles and responsibilities matched to their talents?

- ✓ Do you know your employees' individual skills and strengths?
- ✓ Are individual responsibilities directly linked to the person's strengths?
- ✓ Is significance put in people's abilities and contribution over their title and rank?



ORDER LEVEL



OUTCOME DELEGATION

Are the people closest to the problem empowered to resolve it?

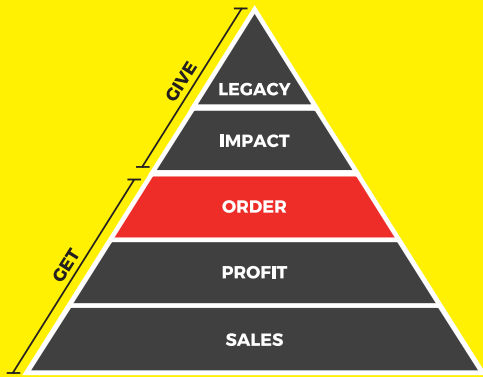
- ✓ Who is responsible for identifying problems in any given area of business?
- ✓ When a problem is identified, who is responsible for diagnosing and resolving the problem?
- ✓ Are your employees empowered to resolve problems they have identified?
- ✓ Are employees empowered to assemble resolution teams?



LINCHPIN REDUNDANCY

Is your business designed to operate unabated when "key employees" are not available?

- ✓ Are there dependencies on any employees for specific tasks that no one else is trained to do?
- ✓ What is the consequence to operations if any specific employee was no longer with the business?
- ✓ How long can the business operations sustain unabated in the absence of any/each key employee?



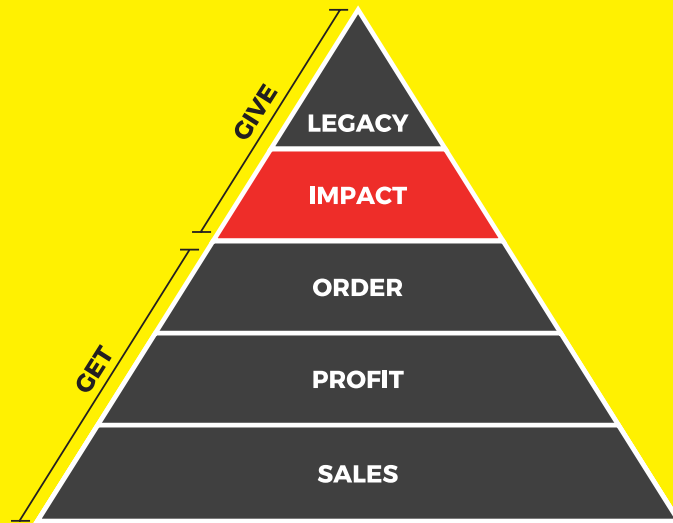
ORDER LEVEL



MASTERY REPUTATION

Are you known for being the best in your industry for what you do?

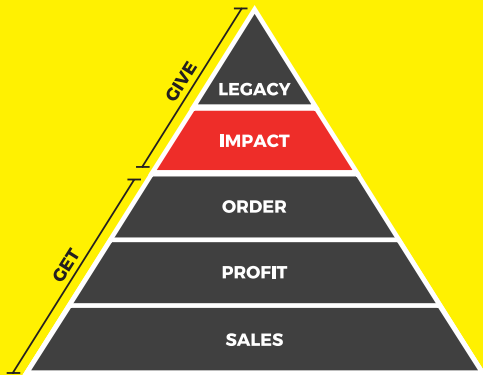
- ✓ What do you want your business to have a reputation of excellence for?
- ✓ What companies do you admire for their reputation? Why?
- ✓ What do people say about your business, when compared to your competitors?



IMPACT LEVEL

The focus now is on the creation of transformation.

Many businesses never properly address the needs at this level, because they either don't know this level exists, or they misunderstand what it's all about. When we think of impact, we often think of how our business impacts the world. However, the needs that must be addressed at this level are related to client transformation, and how your company aligns with your staff, vendors, and your community, not to the wider world.



IMPACT LEVEL



TRANSFORMATION ORIENTATION

Is your business benefiting clients through a transformation, beyond just the transaction?

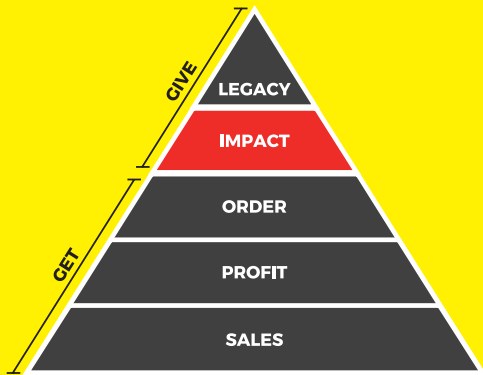
- ✓ Do your clients feel they are part of something bigger, by doing business with your firm?
- ✓ What benefits beyond your products and services do clients gain?
- ✓ Do your clients have a label or a "tribe name" they use are part of your community?
- ✓ How are you benefiting your customers beyond the transaction?



MISSION MOTIVATION

Are all employees (including leadership) motivated more by delivering on the mission than by their individual roles?

- ✓ Does your company have a clear and compelling mission statement?
- ✓ Do your employees know your mission statement?
- ✓ Do your employees feel inspired by the mission statement? Can they relate it to their own experience or intentions?



IMPACT LEVEL



DREAM ALIGNMENT

Are people's individual dreams aligned with the path to the business's grand vision?

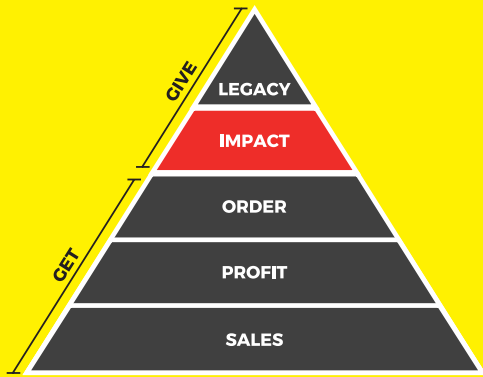
- ✓ What do your employees want to experience in their own lives?
Today, 1 Year, 5 Year, 10 Year?
- ✓ How is the business helping your employees realise these dreams?
- ✓ Are individual dreams recognized and celebrated as well as the business goals?



FEEDBACK INTEGRITY

Are your people, clients, and community empowered to give both critical and complimentary feedback?

- ✓ Do your employees feel empowered to provide critical and complimentary feedback?
- ✓ What specific processes exist for employees, clients and others to give integral feedback?
- ✓ How is the feedback assimilated, analyzed and used by the company to improve?



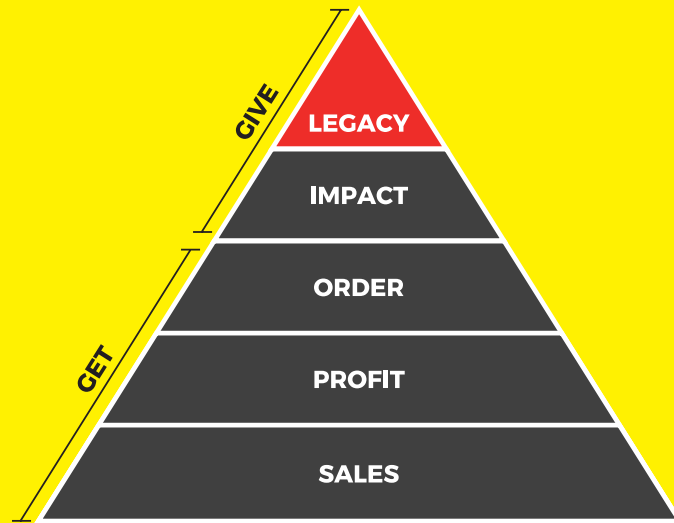
IMPACT LEVEL



COMPLEMENTARY NETWORK

Does your business seek to collaborate with outvendors (including competitors) who serve the same customer base, to collaborate with in order to improve the customer experience?

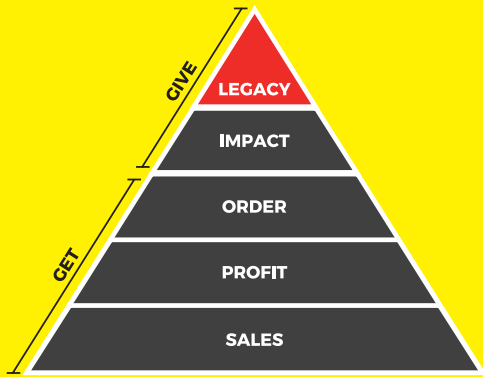
- ✓ What does your company do if it is unable to serve a customer's needs?
- ✓ Who are the businesses or competitors who offer similar or complementary products and services as you?
- ✓ When did you last refer a customer to one alternative, better option?
- ✓ Do clients give positive feedback on the integrity of your company and putting the customer's interests first?



LEGACY LEVEL

At this highest level, the focus is on the creation of permanence.

Ensuring that your business and the impact it delivers will live on after you move on requires that specific needs are met. If you want your business to continue to thrive for generations to come, you'll have to consider the big questions, such as what your long-term vision for your company is, and how your business will adapt to changes in your industry, in consumer demand, and in the world.



LEGACY LEVEL



COMMUNITY CONTINUANCE

Do your clients fervently defend, support, and help the business?

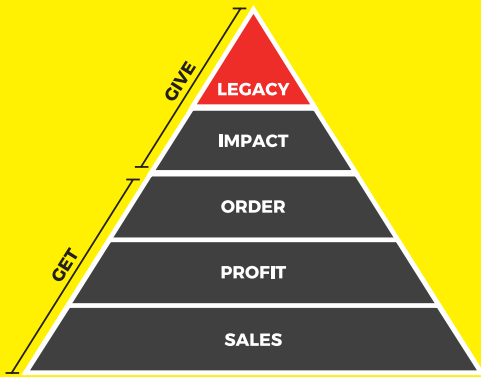
- ✓ What do your customers tell their friends and colleagues about your business?
- ✓ How have clients responded to negative feedback or PR about your company?
- ✓ Have your clients made an effort to improve your company through suggestions or actions?
- ✓ Would your customers be willing to pay more for the services you provide if they knew this would keep you in business?



INTENTIONAL LEADERSHIP TURN

Is there a plan for leadership to transition and stay fresh?

- ✓ Is there a documented plan for the succession of leadership?
- ✓ What is the “grooming” process or development plan for future leadership of your organization?
- ✓ Who are the next leaders in line for your company? What is the schedule?



LEGACY LEVEL



HEART-BASED PROMOTERS

Is the organization promoted by individuals inside and outside the organization, without the need of direction?

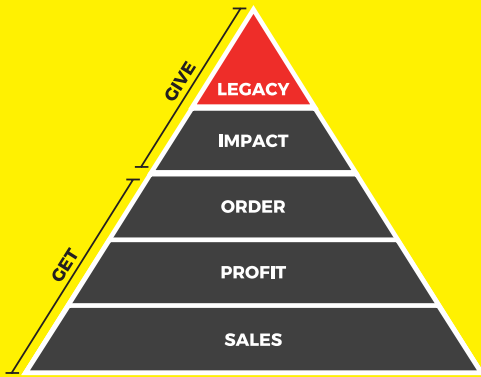
- ✓ How often do your clients refer business to your company, without being asked to do so?
- ✓ How often do your employees refer business to your company, without being asked to do so?
- ✓ Do your employees regularly introduce qualified friends or acquaintances as employment candidates?



QUARTERLY DYNAMICS

Does your business have a clear vision for its future, and dynamically adjust quarterly to make that vision become true?

- ✓ Is there a scheduled quarterly meeting and planning session to realign the business with the vision?
- ✓ What is the vision for your company?
- ✓ Does the company utilize internal and external data to measure the businesses progress towards its vision?



LEGACY LEVEL



ONGOING ADAPTATION

Is the business designed to constantly adapt and improve, including finding ways to better and beat itself?

- ✓ What active steps do you take to identify and strong weak areas in your business?
- ✓ How does the business make changes to enhance the business? How does it get measured?
- ✓ How does the business ensure that a change drives benefit and doesn't negatively affect other aspects of the business?

MASTER TRACKER (CALENDAR)

The Master Tracker is a simple way to measure the progress your business makes toward your vision. The two most common goals for business owners are achieving personal freedom (more time and flexibility in their work and life) and financial freedom (not worrying about bills). In a business this translates into revenue, profit, and other financials, as well as work hours and vacation time. Track the company or personal metrics that will show your progress toward your vision.

	VITAL NEED	DATES	IMPACT (Rev, Profit, OpEx, Time, Reputation, etc.)
FIX 1		Start Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
		Finish Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
FIX 2		Start Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
		Finish Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
FIX 3		Start Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
		Finish Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
FIX 4		Start Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
		Finish Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
FIX 5		Start Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
		Finish Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
FIX 6		Start Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
		Finish Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
FIX 7		Start Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
		Finish Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
FIX 8		Start Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
		Finish Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
FIX 9		Start Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
		Finish Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
FIX 10		Start Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____
		Finish Date	Rev _____ Profit _____ Opex _____ Vacation Time _____
			Work Hours Per Week _____ Other Metrics _____

THE FIX THIS NEXT PROCESS (DETAILED)



STEP 1: IDENTIFY WHICH CORE NEEDS THAT ARE SATISFIED WITHIN THE BBN.

Go through the series of questions and check off the box next to the Core Need that you have determined to be satisfied. For more clarity on each Core Need question, review the Supporting Analysis section in this workbook. When you identify a Core Need as satisfied, check it off. If it is not currently satisfied leave it blank. Do this for all 25 Core Needs.

SALES LEVEL

- ☐ **Lifestyle Congruence:** Do you know what the company's sales performance must be to support your personal comfort?
- ☐ **Prospect Attraction:** Do you attract enough quality prospects to support your needed sales?
- ☐ **Client Conversion:** Do you convert enough of the right prospects into clients to support your needed sales?
- ☐ **Delivering on Commitments:** Do you fully deliver on your commitments to your clients?
- ☐ **Collecting on Commitments:** Do your clients fully deliver on their commitments to you?

PROFIT LEVEL

- ☐ **Debt Eradication:** Do you consistently remove debt rather than accumulate it?
- ☐ **Margin Health:** Do you have healthy profit margins within each of your offerings and do you continually seek ways to improve them?
- ☐ **Transaction Frequency:** Do your clients repeatedly buy from you over alternatives?
- ☐ **Profitable Leverage:** When debt is used, is it used to generate predictable, increased profitability?
- ☐ **Cash Reserves:** Does the business have enough cash reserves to cover all expenses for three months or longer.

THE FIX THIS NEXT PROCESS (DETAILED) CONTINUED...

ORDER LEVEL

- ☐ **Minimized Wasted Effort:** Do you have an ongoing and working model to reduce bottlenecks, slowdowns, and inefficiencies?
- ☐ **Role Alignment:** Are people's roles and responsibilities matched to their talents?
- ☐ **Outcome Delegation:** Are the people closest to the problem empowered to resolve it?
- ☐ **Linchpin Redundancy:** Is your business designed to operate unabated when key employees are not available?
- ☐ **Mastery Reputation:** Are you known for being the best in your industry at what you do?

IMPACT LEVEL

- ☐ **Transformation Orientation:** Does your business benefit clients through a transformation, beyond the transaction?
- ☐ **Mission Motivation:** Are all employees (including leadership) motivated more by delivering on the mission than by their individual roles?
- ☐ **Dream Alignment:** Are people's individual dreams aligned with the path of the business's grand vision?
- ☐ **Feedback Integrity:** Are your people, clients, and community empowered to give both critical and complimentary feedback?
- ☐ **Complementary Network:** Does your business seek to collaborate with vendors (including competitors) who serve the same customer base in order to improve the customer experience?

LEGACY LEVEL

- ☐ **Community Continuance:** Do your clients fervently defend, support, and help the business?
- ☐ **Intentional Leadership Turn:** Is there a plan for leadership to transition and stay fresh?
- ☐ **Heart-based Promoters:** Is the organization promoted by individuals inside and outside the organization, without the need of direction?
- ☐ **Quarterly Dynamics:** Does your business have a clear vision for its future and dynamically adjust quarterly to make that vision become true?
- ☐ **Ongoing Adaptation:** Is the business designed to constantly adapt and improve, including finding ways to better and beat itself?

STEP 2: IDENTIFY THE VITAL NEED OBJECTIVE

Identify the most foundational level (starting with Sales, then Profit, then Order, then Impact, and lastly Legacy) with at least one unsatisfied Core Need. This is your current foundational level:

My company's current level is _____

Then identify of the unsatisfied Core Needs at your current level, which Core Need once resolved, will have the biggest positive impact on that level. This is your Vital Need

My company's Vital Need is _____

STEP 3: CREATE THE OMEN FOR YOUR VITAL NEED

Once you have pinpointed your company's Vital Need, the goal is to fix it. You do this by prioritizing it and concentrating resources for its resolution. To be clear, this is your number one priority and there can not be multiple number one priorities. As you concentrate on resolving the Vital Need you do not abandon the other activities in your business, they continue as normal.

The method to resolving a Vital Need is to use the OMEN method. With this approach you clearly define your objective (your definition of a successful resolution of the Vital Need), measurements (the way(s) you will measure your progress toward your objective), evaluation (the frequency you check your progress) and nurture (the approach you will use to change OMEN settings, if necessary, to resolve the Vital Need).

Use this worksheet to set your OMEN:

The current level is _____ .

(The level identified in Step 2.)

The current Vital Need is _____ .

(The Vital Need identified in Step 2.)

This is the Vital Need because _____ .

(Explain why this was identified as the Vital Need.)

STEP 3 CONTINUED...

OBJECTIVE

The Objective for the Vital Need is _____

_____ (the desired outcome).

MEASUREMENT

The Measurements for the Vital Need are:

Measurement Name	Significance of Measurement	Current	Goal

EVALUATION

Measurement Names	Evaluation Frequency	Red Flags*

**Red Flag - What is the trigger that a Measurement is not performing as expected and action needs to be taken to reevaluate it.*

NURTURE

Vital Need Lead	Single person responsible
Vital Need Team	People on project
Vital Need Plan	Start date
	Planning meeting
	Nurture check-in
	Nurture check-in
	Nurture check-in
	Nurture check-in
	Conclusion
Assignments	Who is doing what

THE FIX THIS NEXT 1-SHEET

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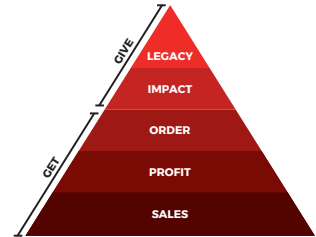
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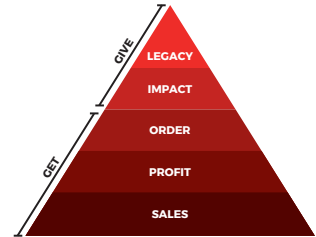
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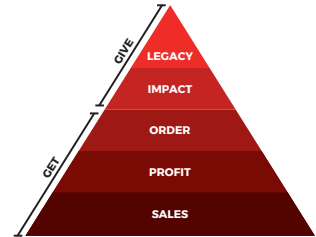
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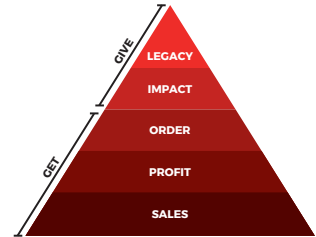
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4	<p>Repeat this process once the Vital Need is fully resolved.</p> <p>Found Vital Need: _____</p> <p>Started Resolution: _____</p> <p>Nurture Points: _____</p> <p>Fully Resolved: _____</p>

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THE FIX THIS NEXT 1-SHEET

- STEP 1:** Check the satisfied Core Needs
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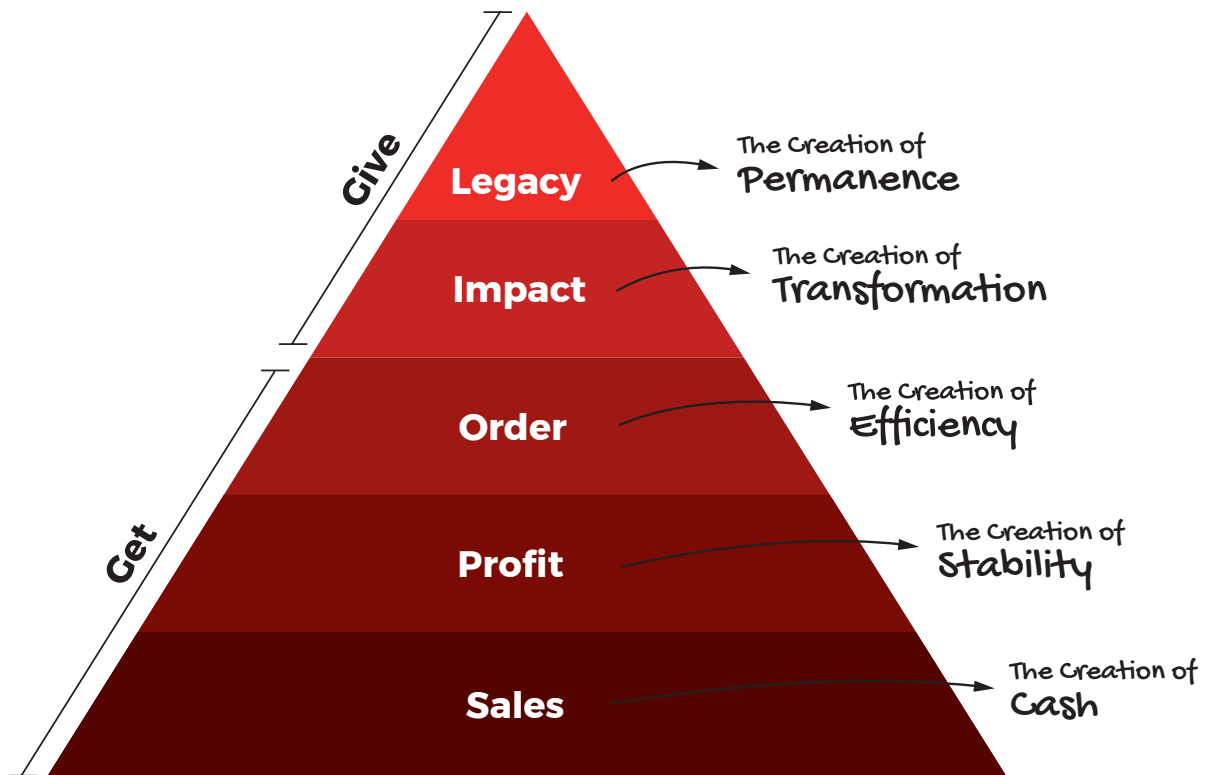
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