

The Ideal Way to Strategize

Identify your category: Customers, Employees (all or specific role), Product/Service offering, Branch

Best _____:

Who are our best performers and likely to grow?

Why do we love them?

Why do they love us?

What are their common traits?

Worst _____:

Who are our worst performers/wrong-fit?

What was our primary challenge with them?

What did they not like about us?

What are their common traits?

Our Ideal _____ Top 10 Traits

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____
- 8. _____
- 9. _____
- 10. _____

Strategies for Development

How do we keep them?

How do we find more of them?

How do we identify the ideal (and potential wrong-fit) early?
