The Evolving the Work Workbook
Welcome!

This workbook was designed to be equal parts journal and notebook. Use it when you want to stop and think. Use it when you want to get going. Fill it out yourself. Invite others to join in.

Mark it up. Make it yours.

Turn the pages for guided exercises on

- Company Retrospective
- User Insights Report
- Competitor Report
- Shareholder Letter

check out koolaidfactory.com for more ideas, tips, and templates!
Prioritization
Is it time to get to work?

When it comes to defining good citizenship at your company...

- **if you’re here or close, it’s probably a good time!**
- **we’re totally failing**
- **we’re executing perfectly**
- **it’s critical to our success**
- **it’s inconsequential for us**
Company Retrospective
Get the gears turning

Use this exercise to: take a step back and reflect on how the company, as a whole, is doing.

IMAGINE: you are in a place where there are no emails to answer, no Slack messages to reply to, no meetings or calls. In this place, time is suspended and the laws of inertia do not apply.

NOW ASK YOURSELF:

- How are we doing?
- Are we working on the right stuff?
- Am I proud of what we’re shipping lately? Why? Why not?
- Are we operating as effectively as we could be?
- Where are we strong? What patterns of behavior and norms are contributing to our success?
- Where are we weak? What patterns of behavior and norms are holding us back?
- What are our blindspots?
- What big topics should I be talking to my team about?
- Are we taking any big swings? If so, are they the right ones? If not, should we be?
- Where have we failed lately? Was the reason for our failure or the way we failed acceptable to me? Why?
- Do we have a common understanding about all of this across our organization?
User Insights Report

Brainstorm

TOPICS TO EXPLORE

- User qualities (demographic, psychographic)
- Funnel performance
- Buyer journey(s)
- Feature users
- Feature satisfaction
- Magic moment
- Churn moment(s)
- Where to go in the future (products/Market)
- Stories from important users
- What else?

PERSPECTIVES TO DRAW FROM

- Product
- User Research
- Engineering
- Sales
- Account Management
- User Support
## TOPICS TO EXPLORE

- Things that got started this year
- Things that gained traction this year
- Glimmers of progress towards your long-term vision/mission
- Progress on the things you planned to do
- Progress on key metrics
- General health of the business
- What you learned this year
- Improvements to the organization (new systems/processes, new leaders, etc.)
- Stats about your employee base (# new people who joined, locations they work from)
- Good failures/things you were wrong about
- Stories of specific users you made an impact on
- Examples of great work
- Things that happened in the broader ecosystem and how you're thinking about it
- Competitive insights
- Company identity-shaping moments

## NOTES
Shar eholder Letter

Brainstorm

TOPICS TO EXPLORE

- New entrants into the space
- Business performance of existing competitors
- Changes to competitors product
- Changes to competitors positioning
- New users acquired
- What else?

PERSPECTIVES TO DRAW FROM

- Product
- Sales
- Account Management
- Finance
- Investors
- User Research

NOTES
Rollout plans
Helping everyone embrace the work

<table>
<thead>
<tr>
<th>WHO</th>
<th>HOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Who needs to know? And when do they need to know?</td>
<td>• What’s the key message?</td>
</tr>
<tr>
<td>• Who do you want input from along the way?</td>
<td>• What channels will you use to distribute the message?</td>
</tr>
<tr>
<td>• Who do you want feedback from before it goes out to the broader team?</td>
<td>• What references and/or resources will you share?</td>
</tr>
<tr>
<td>• Who can help you spread the word?</td>
<td>• How will people share feedback? (And who is responsible for collecting it?)</td>
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<tr>
<td>• Who can help amplify the message?</td>
<td>• How will you evaluate impact?</td>
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<tr>
<td></td>
<td>• When will you revisit the work?</td>
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</tbody>
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*Use this exercise:* Once you’ve picked a tactic and are ready to get the rest of your team on board.