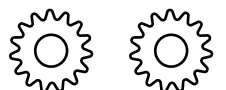
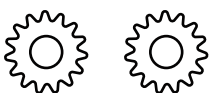
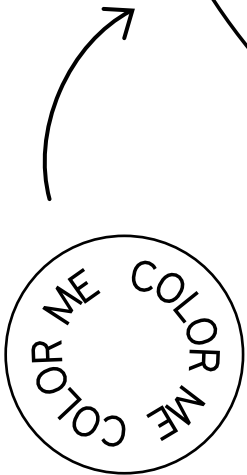
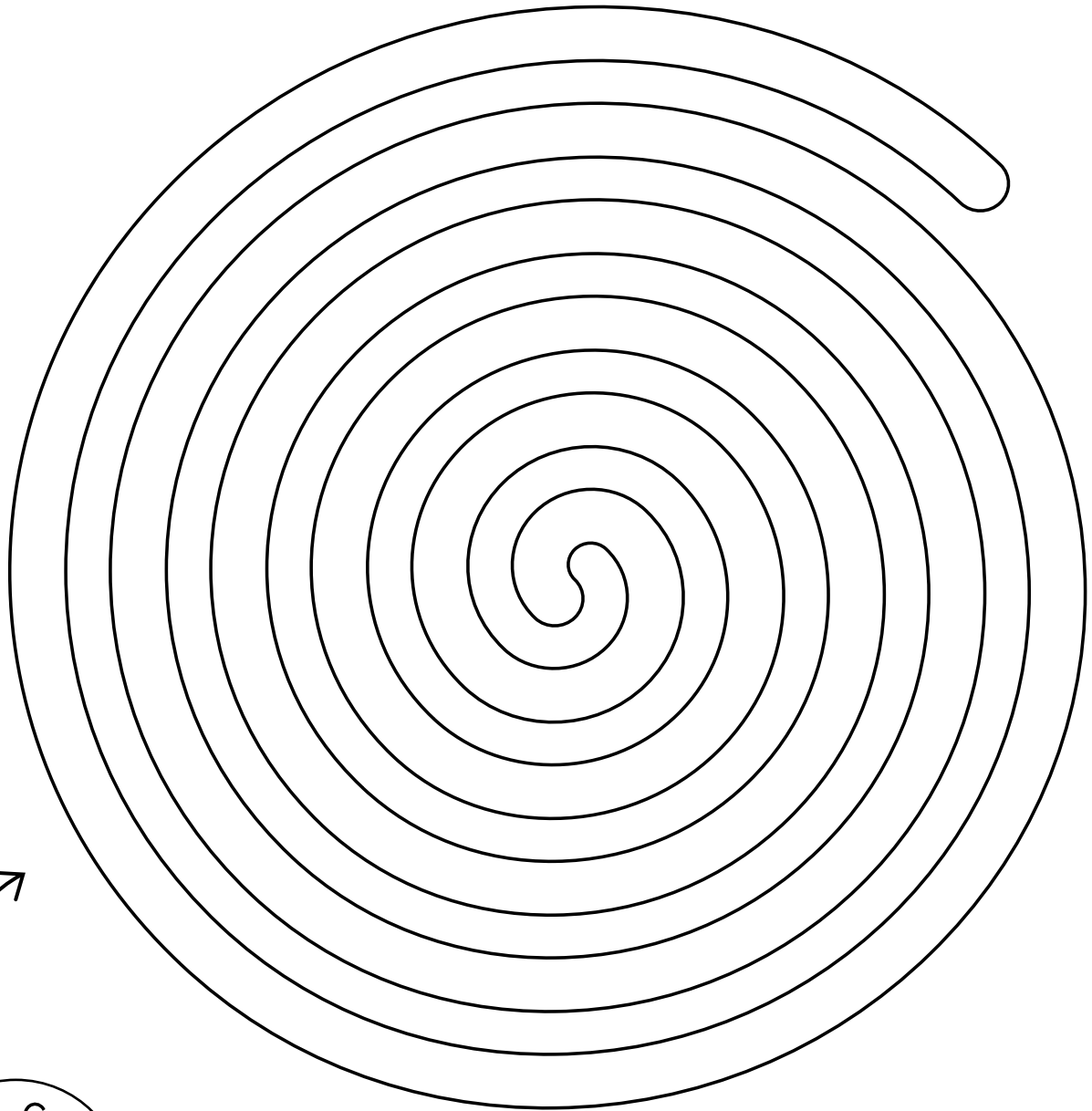


Name

Date

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.

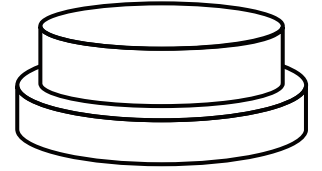
Mark it up. Make it yours.

Turn the pages for guided exercises on

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

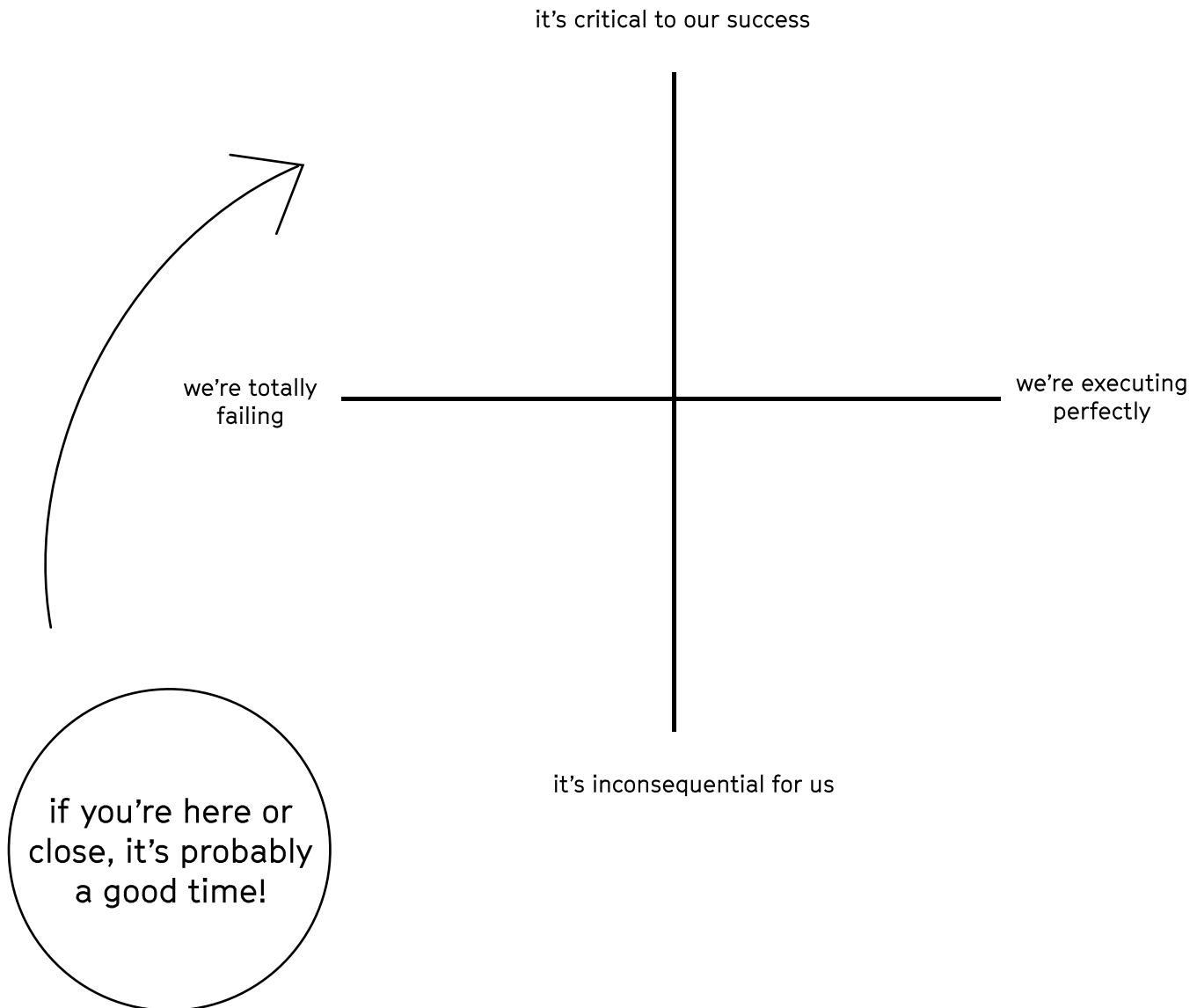
check out koolaidfactory.com for more ideas, tips, and templates!

Prioritization

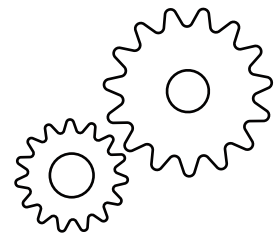


Is it time to get to work?

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



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.

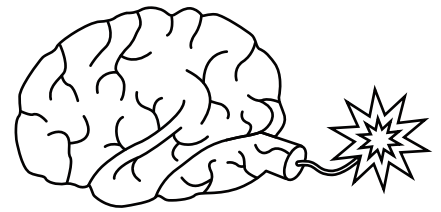
NOW ASK YOURSELF:

- 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?

NOTES

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?

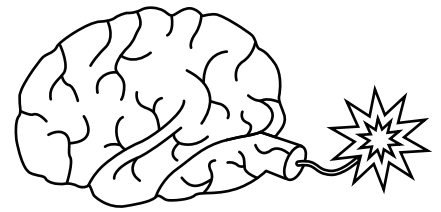
PERSPECTIVES TO DRAW FROM

- Product
- User Research
- Engineering
- Sales
- Account Management
- User Support

NOTES

Competitor Report

Brainstorm



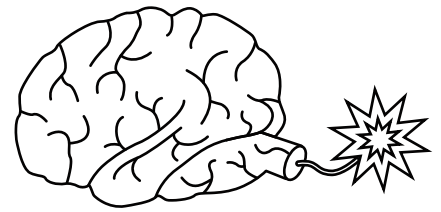
TOPICS TO EXPLORE

- 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

Shareholder 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

Use this exercise: Once you've picked a tactic and are ready to get the rest of your team on board.

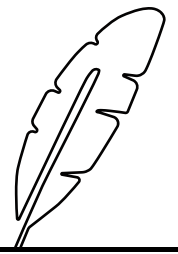
WHO

- Who needs to know? And when do they need to know?
- Who do you want input from along the way?
- Who do you want feedback from before it goes out to the broader team?
- Who can help you spread the word?
- Who can help amplify the message?

HOW

- What's the key message?
- What channels will you use to distribute the message?
- What references and/or resources will you share?
- How will people share feedback? (And who is responsible for collecting it?)
- How will you evaluate impact?
- When will you revisit the work?

Notes



Color Me!

