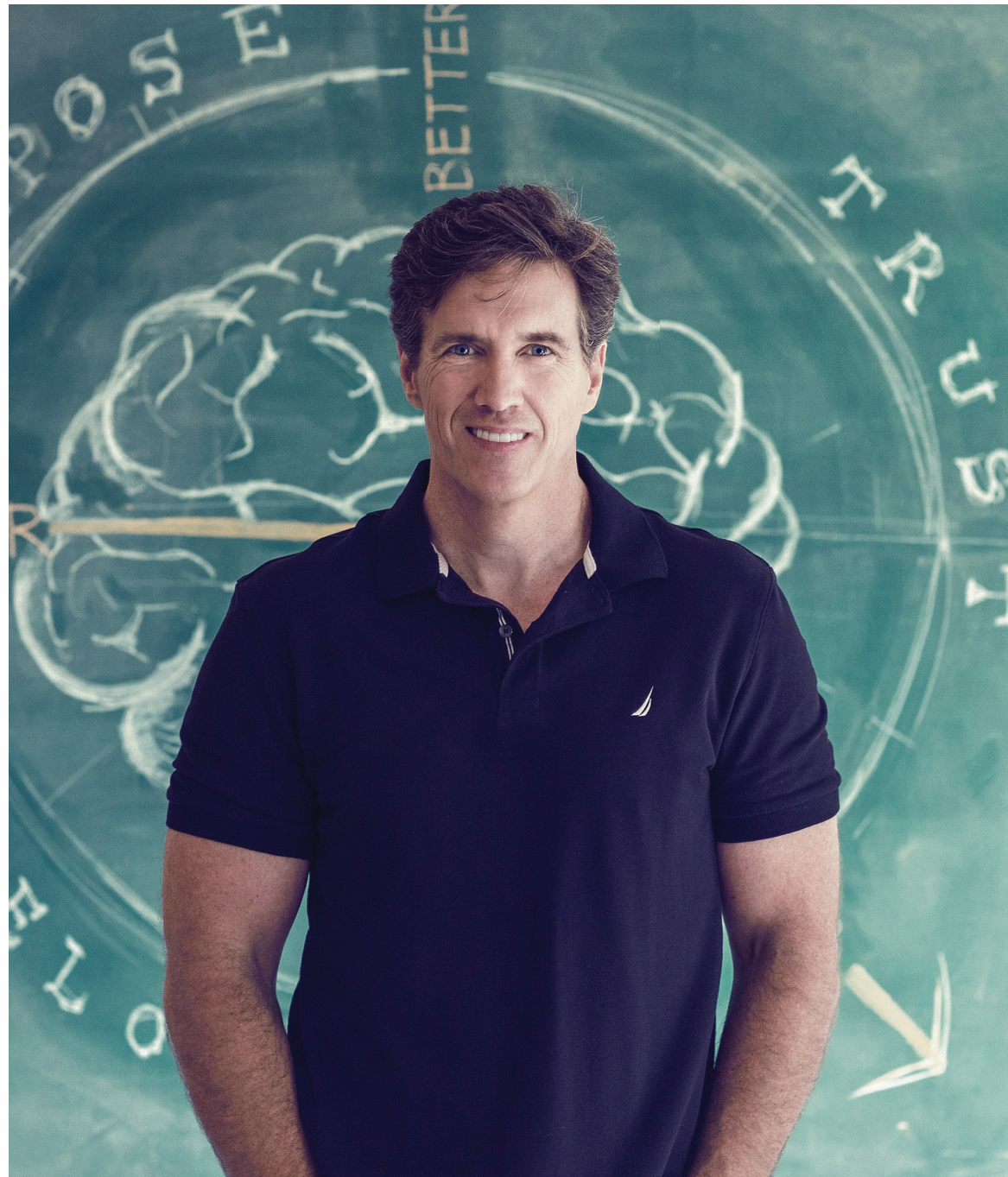


Workbook



Why Nature's First Strategy
Should Be Your Last

JAMES KANE



INTRODUCTION

Congratulations, you have taken the first step towards building meaningful and lasting relationships with your clients, fans, employees, organization members, or partners. This Workbook can help you to create a tailored approach based on the universal principles of loyalty I have studied, researched, written, consulted and presented on for the past 25 years.

It answers the question we all want to know: “**What do I need to do to build a loyal relationship?**” Genuine human loyalty is not about trying to change or manipulate others, but reshaping our own behaviour to meet their needs.

This Workbook will take you through a process similar to the one I use as a consultant. Start by identifying the relationships you want to make loyal and then measure their current state with the three fundamental loyalty building blocks of Safer, Easier, and Better. This approach will help you create a model that can be replicated and tailored to each group you are trying to reach.

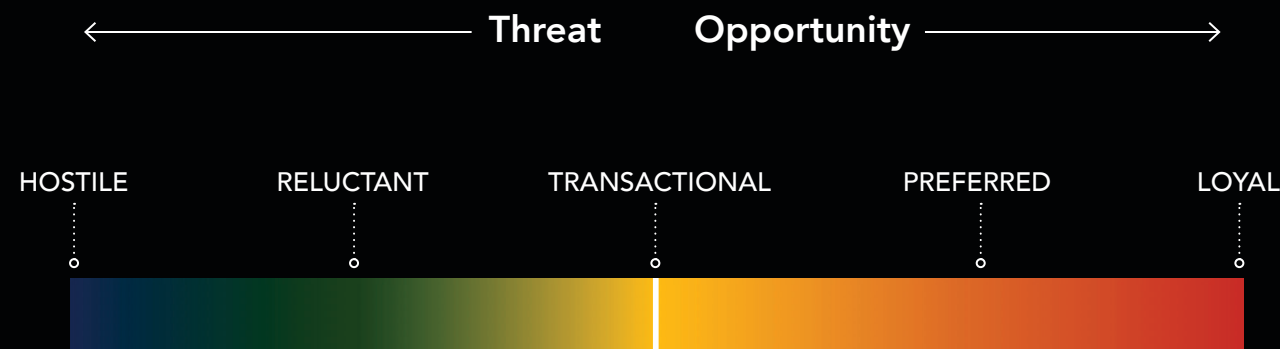
Remember, building loyalty is an investment. It requires a strategy and a consistent approach. When you do, you will be rewarded with sustained enthusiasm and genuine advocacy, forgiveness when mistakes are made, and no loss in position when competitors enter the field. Best of all, you will experience the joy of a shared journey and the fulfilment of making others’ lives better while achieving your own goals.

A handwritten signature in black ink, appearing to read 'James Kane'.

All of your relationships fall somewhere on a spectrum:

Our brain, like the brain of every animal, has a primary purpose: interpret the world and alert its owner of any potential dangers that may be a threat, while being on the lookout for any opportunities that may be beneficial to its survival.

It does this for our internal world—our body—warning us of risks by delivering pain, fever, nausea, and infection, and issuing cravings for things good for us, including food, sunlight, sex, and companionship. It does the same with our external world, constantly scanning the environment for those things (and people) that can benefit us and those that could do us harm.



RELATIONSHIP SPECTRUM

LOYAL

"I love you!"

A loyal relationship is nearly unbreakable. One that isn't measured by price or ability alone. Those things matter, but not as much as other factors that create more emotional bonds. We are loyal to those who are indispensable in our lives and always have our best interests at heart; those who make our lives safer, easier, and better—those we trust unconditionally and view as partners and trusted advisors.

PREFERRED

"I like you...but"

When someone is in a Preferred relationship, they are content and satisfied. They don't "love" you and will probably stay with you until something better comes along. But rest assured, when something or someone better does show up, or when they need to choose between you and some other alternative, they will leave you or let you go. This is why satisfied relationships are never an indicator of long-term loyalty.

TRANSACTIONAL

"I don't owe you anything. You don't owe me anything."

Transactional relationships are based on a mutual exchange, leaving both parties with no further obligations. You've achieved success, whether it's making the sale, winning the case, hitting your fundraising goal, or releasing a new album. You've fulfilled your end of the agreement and they have paid you accordingly. There isn't any lingering debt between the two parties; everyone has done their part.

RELUCTANT

"I'm not sure I want to be in this relationship anymore."

Reluctant relationships are often in need of an escape. They become stagnant and unfulfilling - and potentially even riddled with distrust. Coupled with a sense of obligation, habit, or nostalgia, these relationships can cause one to feel like a virtual hostage in a situation seemingly with no way out. The relationship may remain in this condition for a prolonged period of time without any clear indication of leading to either betterment or failure. Common rationalizations for remaining in these types of relationships include: "I only have five years to retirement," "Changing to a new program is too complicated and time-consuming," "I'm not a fan of their products or services, but they're close and convenient," and "I stay for the sake of the kids."

HOSTILE

"I hate you!"

Hostile relationships can be damaging, as you become the loudest critic and adversary of the person, product, or service. You won't just express your disdain to them, but to everyone around you, likely dissuading further professional or personal interaction.

SATISFACTION ≠ LOYALTY



Dogs are loyal



Cats are satisfied

Satisfaction is **a mood**

Loyalty is **a behavior**

Satisfaction is about **the past**

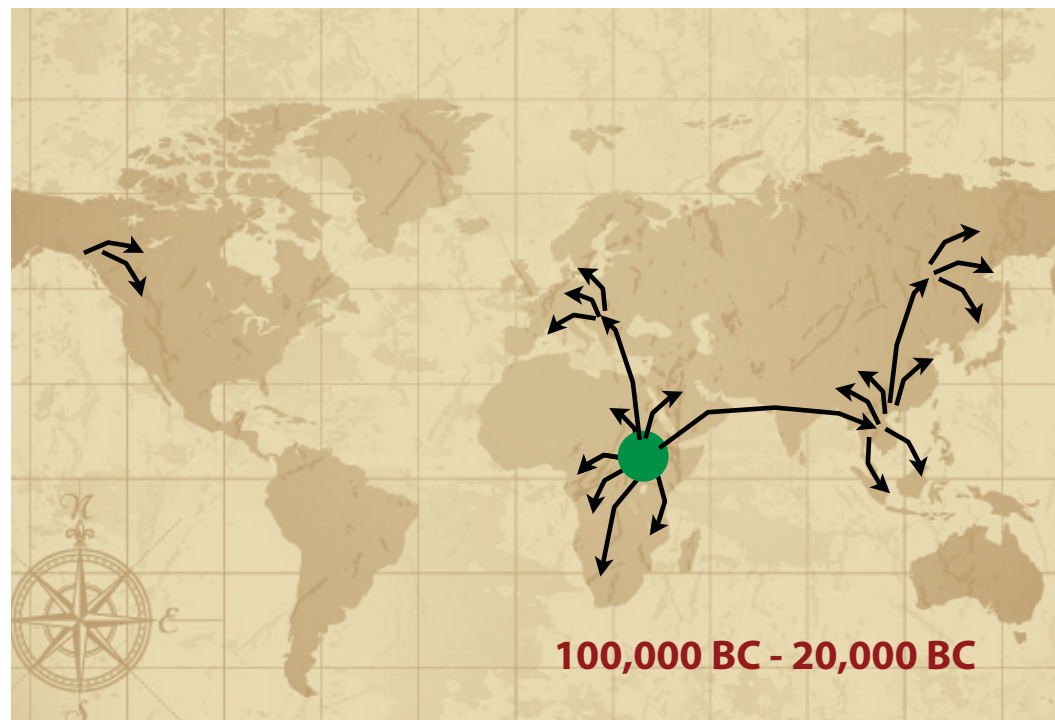
Loyalty is about **the future**

Satisfaction is about what
you do **for them**

Loyalty is about what
they do **for you**

THE EVOLUTION OF LOYALTY

Loyalty has often been misrepresented over time, with poets and philosophers describing it as a sign of moral excellence, while rulers such as kings and queens, generals, and presidents saw it as a duty or a responsibility. In modern times, marketers and fundraisers have reduced it to incentivized behavior, while employers have used it as a measure of their staff's commitment. Unfortunately, consultants have oversimplified it, leading people and organizations to believe that loyalty can be measured with a single question, or that loyalty is automatically given for simply doing what is expected.



The romantic notion of loyalty as a self-sacrificing act of love has been perpetuated for centuries – yet the evidence suggests something different altogether. What appears to be a devotedness to others is actually a strategy for living - one that has been in place for billions of years. Its foundations can be found in chemistry, biology and physics, under different titles such as fusion, bonding, symbiosis and cooperativity. At its core, these concepts share the same underlying principles, impulses and outcomes. When two or more elements merge and form lasting, cooperative bonds, they become more successful than those which don't.



Humans are distinct in their capacity to inhabit and work together with individuals outside of their family and social network. This ground breaking strategic decision has allowed the 90-lb. weakling of the Savannah plains to emerge as the most powerful species on Earth.

Living in sizable societies necessitated the evolution of the human brain, enabling us to identify potential risks and opportunities within our midst. To survive, our brains had to develop the cognitive capabilities to monitor which strangers were a threat and which provided protection and opportunity.



Stop, Go, or Proceed with Caution

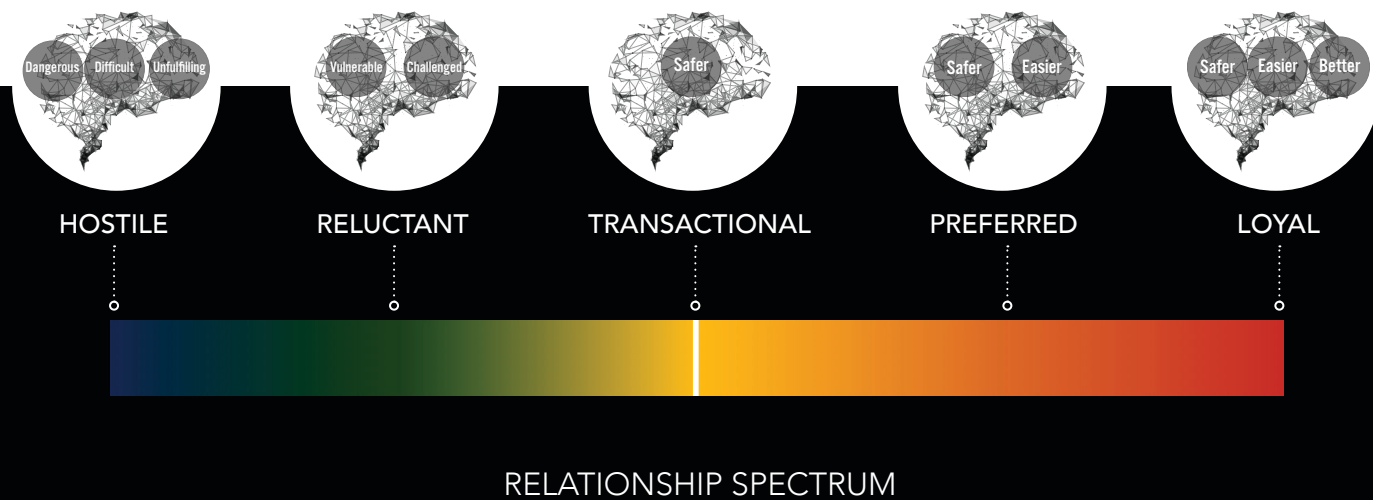
Our brain determines the direction and depth of all of our relationships based on the signals it receives.

How do you ensure your safety in uncertain situations? How can you be certain that the people you meet will help you, rather than hinder your progress? And how do you know that a relationship will be fulfilling and lead to your desired goals and aspirations?

We often overlook these questions and rely solely on our intuition. At a deeper level, though, it is our brain that is assessing the environment, interpreting signals, and determining the type of relationship we should maintain and the extent of its threat or benefit. It translates the information into a spectrum that can range from hostile to loyal, or from hate to love.

For all of its complexity and sophistication, the human brain has a relatively simple purpose: receive input about the outside world, interpret its meaning, and coordinate some response with the rest of our body. Our emotions and affect - our instincts - are not physical entities that reside within our brains. They are mental constructs of our minds that allow us to assess and react to the signals it receives.

So, how do we know when we are **safe**, when our lives will be **easier**, and when our lives will be **better**? Our brain adapted mental constructs to evaluate each.



SAFER: A Sense of Trust

Survival is the driving force for all living creatures, and humans are no exception. To thrive in society, we must trust in the people around us. This sense of trust helps us assess potential risks in our relationships, just like other animals rely on their claws, camouflage, and stingers for protection. In short, trust is essential for safeguarding ourselves from any potential harm or hazards. It's what keeps us safe.

EASIER: A Sense of Belonging

Our sense of Belonging isn't just about emotional expressions, like love songs and poems. Instead, it's about optimizing our lives and making them more efficient. By forming relationships with others, we are looking for proxies who think, act, and value the same things that we do. Belonging is an assurance that others understand us enough to help us lead an easier life. Our minds have devised this faculty- to help us embrace thermodynamics and reduce the amount of time, energy, and resources we expend. A sense of Belonging is about understanding others and meeting their needs. Only then can we strive to make each other's lives easier.

BETTER: A Sense of Purpose

Our incomparable human cognition has empowered us to discover a sense of Purpose that transcends mere physical development and reproduction. Our problem-solving brains are capable of predicting the future, reading the minds of others, comprehending language and creating myths, all of which can aid in survival. But when we began turning our problem-solving capabilities inwards, something extraordinary happened; we started to search for our place in the world, desperately seeking answers to our ultimate questions: why are we here, why do we matter and what is our life about?

In pursuit of greater flourishing and a more meaningful existence, we seek out those who can help us find Purpose. Our impressive cognitive aptitude has enabled us to find the answers we seek and, consequently, to thrive. We form connections with those who can help us find answers to those complex questions.

A Strategic Approach to Loyalty

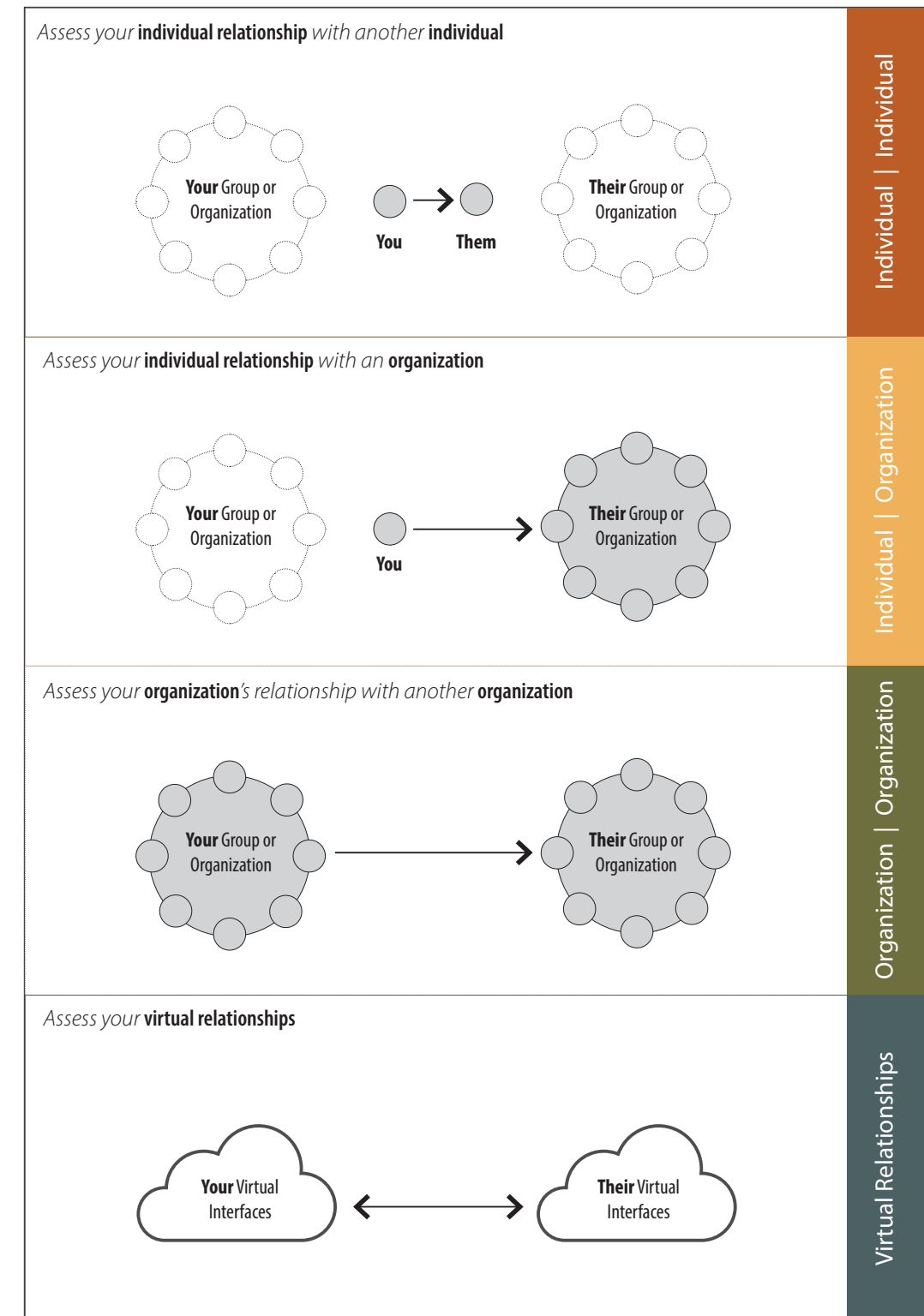
Our relationships with others - including those that hold the keys to our fulfillment and success - are often intuitive, undertaken without much thought or analysis.

That is a mistake.

We often assume that the bonds we form with others emerge without any deliberate effort, assuming that connections are all about a certain chemistry between two people or a stroke of luck. However, relationships are as much a part of our nature as anything else. Just as we plan for other outcomes we desire in life, why wouldn't we take the same approach to something as meaningful and impactful as the people who enter our lives?

Creating a strategy for your relationships isn't phony or contrived - it's an act of care and attentiveness. This workbook offers a step-by-step guide to building and maintaining strong and loyal relationships between individuals, organizations, and even in virtual and non-personal interactions. You and your team can assess the current state of any key relationship by examining the levels of trust, belonging, and purpose, and then creating a strategic plan to improve them.

Just like generals have military strategies, lawyers have prosecution strategies, and politicians have campaign strategies, taking a strategic approach to your relationships can help ensure success and lasting bonds. Don't let relationships develop solely through luck - be proactive in managing them!



Do you make their lives

SAFER?

PREFACE

Before developing a strategy and tactics for making the lives of your relationships Safer, you need to first spend time thinking about what is making their lives unsafe. What are the threats they face? What are they afraid of or worried about? What is making them vulnerable and susceptible? What challenges—current and potential—can cause them harm? What are their financial risks?

Trust is the bedrock of a loyal relationship, but it isn't the end-all. In fact, it's barely a starting point. Every relationship in your life - regardless of how important or inconsequential - EXPECTS you to be trustworthy. They expect you to be fair, honest, and ethical in your dealings with them, while treating them with courtesy and respect. They expect you to be competent at what you do and confident you have the skills, experience, knowledge, and expertise they require. They expect you to be consistent in your actions and behaviors, believing you will continue to be attentive to them and behave in a predictable, reliable manner. And they expect you to have the capacity to adequately address all of their current and future needs, possessing the right amount of resources, capabilities, and potential to support them.

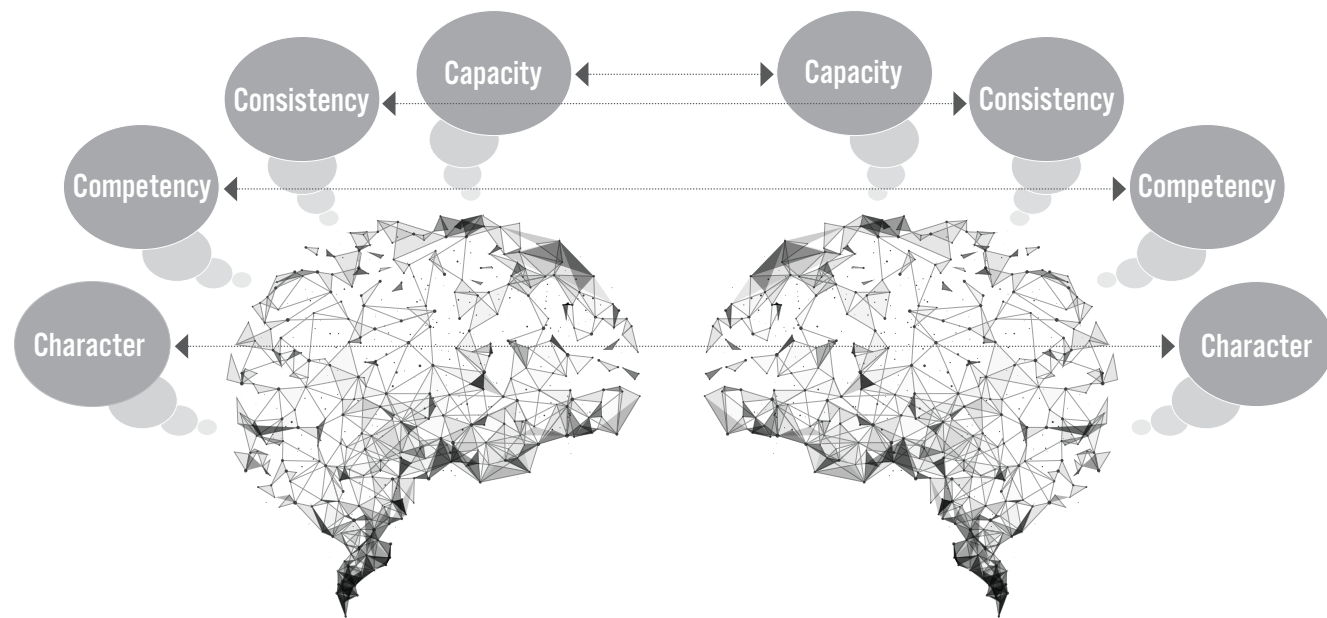


A SENSE OF TRUST

MANAGING EXPECTATIONS

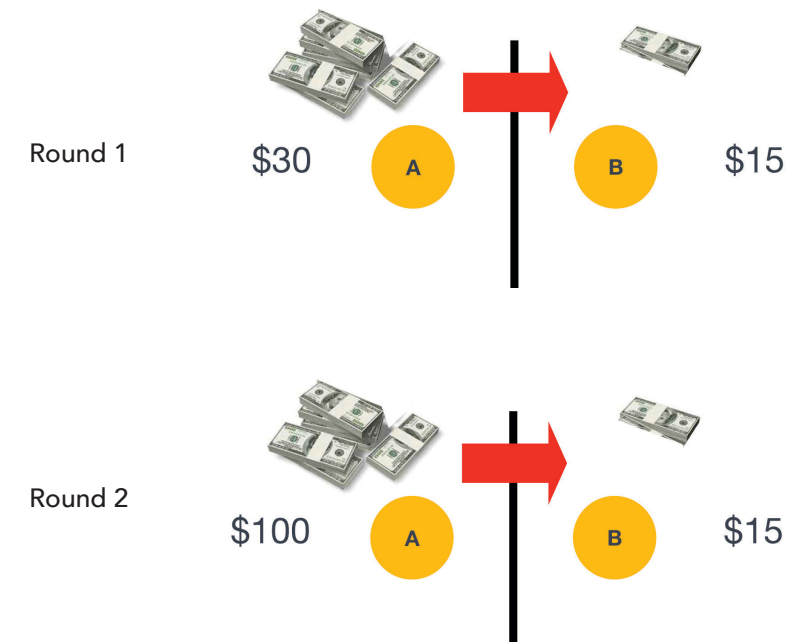
The hurtful words “I don’t trust you” can be difficult to hear. While it can be easy to take offense and dismiss what was said, it’s important to remember that trust is not a universal belief. It is an alignment of standards and ideals which vary from person to person. When interacting with others, we look to determine if they share similar values and beliefs as us—if they see the world the way we do.

It’s not enough for someone to simply be competent; their skills must meet our own expectations before we can trust them. Further, their character, consistency, and capacity must meet our standards. Too often, organizations and individuals overlook this concept, believing their standards should be sufficient. Ultimately, it is our own standards that matter.



Trust is about alignment

The Ultimatum Game

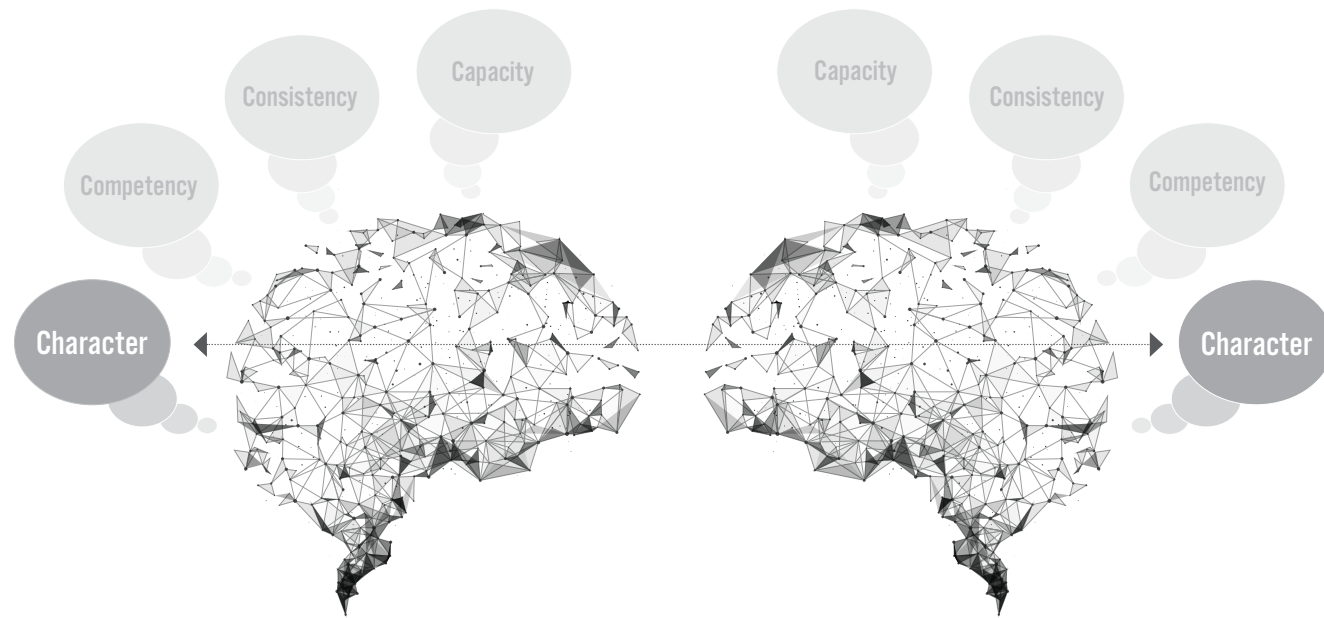


The Ultimatum Game has shown us that, when establishing a relationship with others, the outcome is not the only factor that matters; the process and expectations associated with it also have an impact.

Whenever we enter a business agreement, we expect a certain delivery. We expect the person to fulfill the task we have hired them to do, whether it’s painting our house, investing our money, policing our streets, or doing our taxes. Though we may pay for the service rendered, it does not create an obligation to be a continued advocate for their business. We have simply conducted a transaction, nothing more.

So what is the secret to allow these relationships to thrive? It is understanding the expectations for four essential C’s- competency, character, consistency and capacity. By understanding and then exceeding these expectations, you can foster meaningful relationships that go beyond a singular transaction.

CHARACTER



Trust is about alignment

Organizations today are increasingly embedding character into the very fabric of their operations, moving beyond the binary perception of character as simply right or wrong. This nuanced approach recognizes character as encompassing a spectrum of qualities, including honesty, fairness, transparency, respect, and generosity. These traits are more than just ideals; they are tangible qualities that are actively integrated into the daily practices and policies of an organization.

By ensuring that your character traits deeply resonate with and accurately align with your clients', you begin to lay the crucial foundation for trust. Such a commitment means that every action and offering must authentically represent the character standards that clients cherish. Understanding your clients' character standards and identifying both the areas of alignment and potential misalignments is essential. Addressing these gaps proactively is key to preventing any negative impacts on long-term relationships, solidifying the trust and mutual respect that are foundational to enduring partnerships with your clients.

CHARACTER EXAMPLES

Chick-fil-A

Chick-fil-A is a fast-food restaurant chain known for its commitment to Christian values. One of their most prominent displays of character is their decision to close all of their locations on Sundays to allow employees to spend time with their families or attend religious services.

The Body Shop:

The Body Shop is a cosmetics and skincare company that has been a leader in ethical business practices. They are against animal testing and source many of their ingredients from sustainable and fair trade sources.

Ben & Jerry's:

Ben & Jerry's, an ice cream company, is renowned for its dedication to social and environmental causes. They actively support various social justice initiatives and often take a stand on political issues.

Patagonia:

Patagonia, an outdoor clothing company, is committed to environmental sustainability, fair labor practices, and corporate responsibility. They aim to produce high-quality products while minimizing their environmental impact.

TOMS:

TOMS is a shoe company that operates on a one-for-one business model. For every pair of shoes purchased, TOMS donates a pair to a person in need. This socially conscious approach is central to their brand.

Warby Parker:

Warby Parker is an eyewear company that has a strong commitment to social responsibility. They provide eyeglasses to those in need and work to ensure that their products are produced ethically and sustainably.

Seventh Generation:

Seventh Generation is a company that produces environmentally-friendly household and personal care products. They are committed to sustainability, transparency, and ethical business practices.

Costco:

Costco is a membership-based warehouse retailer that is known for its fair treatment of employees. They pay higher wages, offer good benefits, and have a reputation for ethical business practices.

CHARACTER CLIENT ASSESSMENT

Please rate the emphasis your client places on Character traits within their organization, using a scale from 0 (Not Emphasized) to 10 (Highly Emphasized) and then answer the questions that follow. Recognize that while all traits are valuable, this scale identifies which are particularly prioritized.

Integrity and Fairness

0 1 2 4 5 6 7 8 9 10

1. Does the client demonstrate a strong commitment to integrity in their business practices or decision-making?
2. Does the client shown fairness in their dealings with you, their employees, or other partners, particularly in situations that required balancing competing interests or making tough choices?

Transparency and Accountability

0 1 2 4 5 6 7 8 9 10

1. Does the client practice transparency in their communication and actions with us or other stakeholders?
2. Does the client take responsibility for their decisions or actions, particularly in challenging situations, demonstrating accountability?

Respect and Empathy

0 1 2 4 5 6 7 8 9 10

1. Does the client highlight their respect towards you, your team, their own employees, or other partners?
2. Does the client demonstrate empathy, either in their response to feedback or in understanding the needs and challenges of others involved?

Collaboration and Inclusivity

0 1 2 4 5 6 7 8 9 10

1. Does the client actively encourage and value collaboration with you, your team or within their own organization, to achieve common goals?
2. Does the client embrace inclusivity, ensuring diverse perspectives and backgrounds are represented and valued in their projects or decision-making processes?

Attitude and Tempermant

0 1 2 4 5 6 7 8 9 10

1. Does the client promote a positive and optimistic outlook, even when faced with setbacks or challenging circumstances?
2. Does the client foster a temperament that emphasizes positivity and optimism in problem-solving and during client-team interactions?

Sustainability and Stewardship

0 1 2 4 5 6 7 8 9 10

1. Does the client commit to sustainability, such as implementing eco-friendly practices or prioritizing long-term environmental health in their projects?
2. Does the client encourage stewardship, taking responsibility for the impact of their actions on the community, environment, or industry standards?

Additional Character Attributes

1. Are there other Character attributes or virtues that your client values highly and actively incorporates into their core values, business practices, and interactions? If so, how are these manifested within your client's organization?

CHARACTER SELF-ASSESSMENT

Please rate the emphasis you and your organization place on Character traits, using a scale from 0 (Not Emphasized) to 10 (Highly Emphasized), and then answer the following questions. Note that while all traits are valuable, this scale identifies which ones are particularly prioritized.

Integrity and Fairness

0 1 2 4 5 6 7 8 9 10

1. Do you and your organization demonstrate a strong commitment to integrity in your business practices or decision-making?
2. Do you and your organization show fairness in your dealings with clients, employees, or other partners, particularly in situations that required balancing competing interests or making tough choices?

Transparency and Accountability

0 1 2 4 5 6 7 8 9 10

1. Do you and your organization practice transparency in your communications and actions with the client, colleagues, or other stakeholders?
2. Do you and your organization take responsibility for your decisions or actions, particularly in challenging situations, demonstrating accountability?

Respect and Empathy

0 1 2 4 5 6 7 8 9 10

1. Do you and your organization demonstrate respect towards your team, employees, clients, or other partners?
2. Do you and your organization demonstrate empathy, either in your response to feedback or in understanding the needs and challenges of others involved.

Collaboration and Inclusivity

0 1 2 4 5 6 7 8 9 10

1. Do you and your organization actively foster collaboration, either within your team or with external partners, to achieve common goals?
2. Do you and your organization embrace inclusivity, ensuring that diverse perspectives and backgrounds are represented and valued in your projects or decision-making processes?

Attitude and Temperament

0 1 2 4 5 6 7 8 9 10

3. Do you and your organization promote a positive and optimistic outlook, even when faced with setbacks or challenging circumstances?
4. Do you and your organization foster a temperament that emphasizes positivity and optimism in problem-solving and during client-team interactions?

Sustainability and Stewardship

1. Do you and your organization demonstrate a commitment to sustainability, such as implementing eco-friendly practices or prioritizing long-term environmental health in our projects?
2. Do you and your organization encourage stewardship, taking responsibility for the impact of our actions on the community, environment, or industry standards?

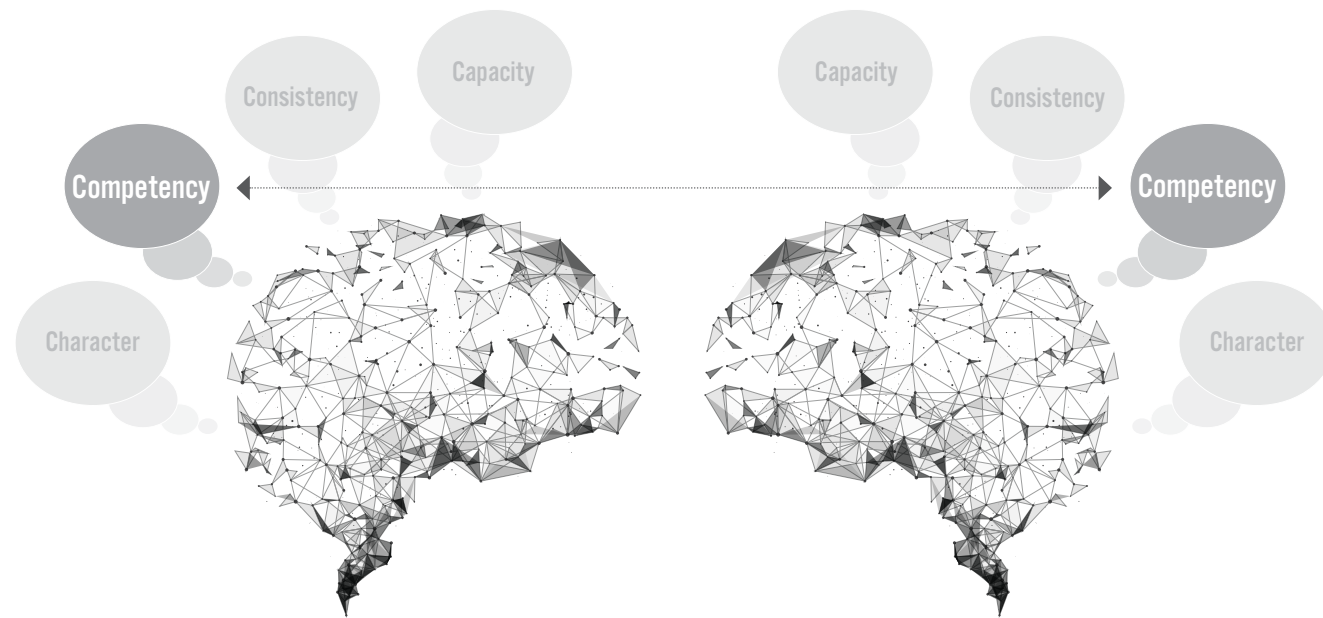
Additional Character Attributes

1. Are there other Character attributes or virtues that do you and your organization values highly and actively incorporates into your core values, business practices, and interactions? If so, how are these manifested within your organization?

ASSIGNMENT

To assess the alignment between your values and those of your organization with your clients', compare your scores and responses from this self-assessment with the clients' provided on the preceding page.

COMPETENCY



Trust is about alignment

Trusting others involves more than just assessing their character and integrity; it also demands confidence in their ability to achieve results. Good intentions fall short without the capacity to fulfill expectations. Trust hinges on believing in one's competence, encompassing skills, experience, expertise, and moral qualities.

Humanity stands apart from other species due to our capacities for collaboration, strategy, support, and innovation, making us the most influential entity in history. Like our forebears, who judged potential allies as assets or risks, we continue to evaluate the value others bring. For example, in aviation, a pilot's ethical values are less immediate than their adeptness in handling diverse weather conditions.

Before deeming someone competent, first appraise your own qualifications, such as your skills, experience, or knowledge. Next, align these with the competencies your clients or customers deem important. Identifying and bridging any discrepancies can significantly enhance your interactions with them, often more than you might anticipate.

COMPETENCY EXAMPLES

NASA (National Aeronautics and Space Administration):

NASA is the United States government agency responsible for the nation's civilian space program and for aeronautics and aerospace research. It is known for its rigorous standards of precision engineering and its commitment to excellence in space exploration.

Husqvarna:

Husqvarna is a Swedish company known for producing high-quality outdoor power equipment such as lawnmowers, chainsaws, and garden tractors. They emphasize exceptional competency in the design and manufacturing of their products.

Misono:

Misono is a Japanese knife maker known for producing high-quality kitchen knives. Their knives are prized for their exceptional sharpness, balance, precision, and attention to detail.

Leica Camera AG:

Leica is a German company known for producing high-end cameras and optical equipment. They are revered for their exceptional quality, precision engineering, and expertise in optics.

Google:

Google is a multinational technology company that places a strong emphasis on technical expertise and innovation. They prioritize hiring top talent and invest heavily in research and development.

Boeing:

Boeing is a major aerospace and defense corporation that places a strong emphasis on engineering expertise and precision in the design and manufacturing of aircraft and aerospace technology.

Mayo Clinic:

Mayo Clinic is a nonprofit American academic medical center that prioritizes medical knowledge, research, and patient care. It is known for its high standards of competency in healthcare.

Prada:

Prada is an Italian luxury fashion house known for its high-quality materials, innovative designs, and attention to craftsmanship. They emphasize competency in fashion design and production.

COMPETENCY CLIENT ASSESSMENT

Please rate the emphasis your client places on Competency traits within their organization, using a scale from 0 (Not Emphasized) to 10 (Highly Emphasized) and then answer the questions that follow. Recognize that while all traits are valuable, this scale identifies which are particularly prioritized.

Talent and Skills

0 1 2 4 5 6 7 8 9 10

1. Does the client **prioritize** and invest in the talent of their workforce?
2. Does the client leverage specialized skills to drive innovation or solve complex challenges?

Expertise and Knowledge

0 1 2 4 5 6 7 8 9 10

1. Does the client rely on expertise and specialized knowledge to differentiate themselves in their market or solve industry-specific challenges?
2. Does the client prioritize and invest in exceptionally deep industry knowledge in shaping its strategic approach and market positioning?

Experience and Credentials

0 1 2 4 5 6 7 8 9 10

1. Does the client prioritize its experience and track record when persuading others about their value.
2. Does the client lead with its credentials or professional qualifications of their team members when marketing their operations or the services they provide?

Innovation and Adaptability

0 1 2 4 5 6 7 8 9 10

1. Does the client prioritize and invest in innovation, and does it impact their services, products, or market position?
2. Does the client prioritize adaptability in response to changing market conditions or emerging challenges?

Quality and Excellence

0 1 2 4 5 6 7 8 9 10

1. Does the client prioritize an exceptional commitment to quality that manifests in their products or services?
2. Does the client go above and beyond to achieve excellence, setting them apart from competitors?

Productivity and Efficiency

0 1 2 4 5 6 7 8 9 10

1. Does the client significantly invest in and prioritize their productivity and operational efficiency?
2. Does the client invest in and prioritize efficiency in processes or resource management and has it notably impacted project outcomes or service delivery?

Image and Reputation

0 1 2 4 5 6 7 8 9 10

1. Does the client prioritize and invest in its public image and reputation as a means of marketing its products and services?
2. Does the client prioritize and invest in maintaining and enhancing a reputation that surpasses the standard expectations of their industry?

Additional Competency Attributes

1. Are there any other Competency qualities or attributes that your organization particularly values and has integrated into your core values, affecting how you conduct business and interact with others? If so, how are these qualities manifested in your operations and relationships?

COMPETENCY SELF-ASSESSMENT

Please rate the emphasis you and your organization place on Competency traits, using a scale from 0 (Not Emphasized) to 10 (Highly Emphasized), and then answer the following questions. Note that while all traits are valuable, this scale identifies which ones are particularly prioritized.

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1. Does your organization prioritize and invest in the talent and skills of its workforce?
2. Does your organization leverage specialized skills within its team to drive innovation or solve complex challenges?

Expertise and Knowledge

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Innovation and Adaptability

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Quality and Excellence

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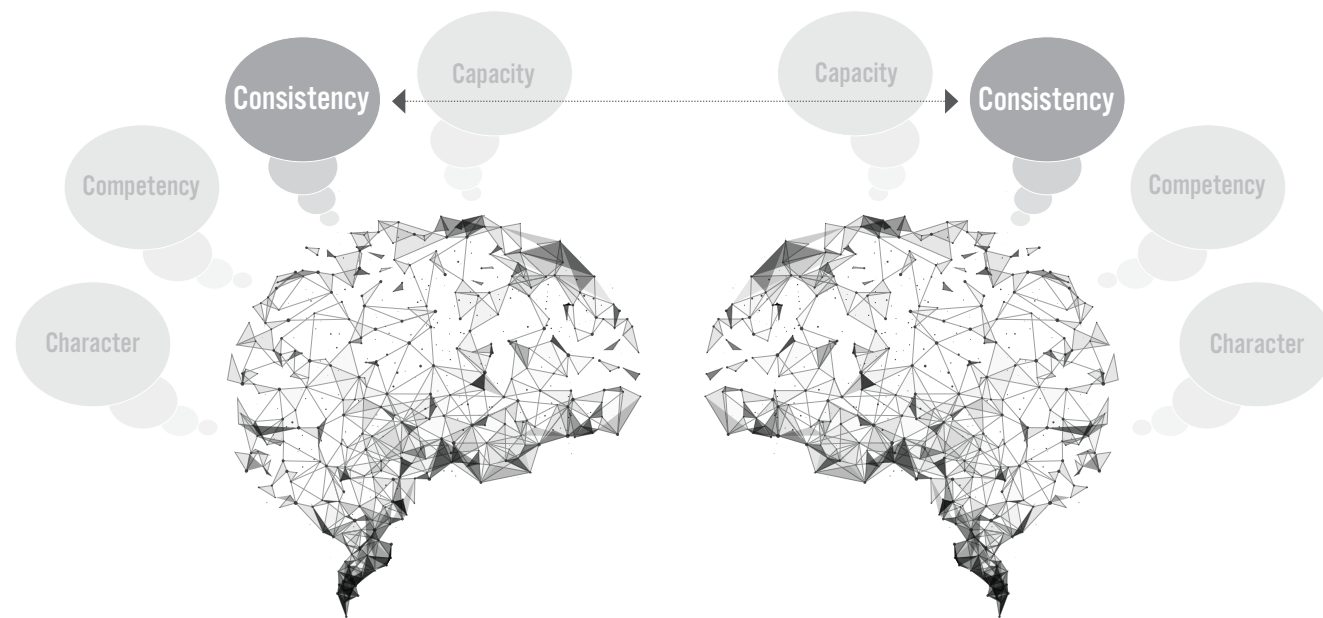
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ASSIGNMENT

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CONSISTENCY



Trust is about alignment

Let's revisit the core goal of these steps: building lasting trust. This ensures your customers feel secure in choosing you, a fundamental aspect of fostering loyal relationships. The aim is to cultivate enduring connections, making customers prefer you over others, regardless of tempting offers from competitors. This requires reciprocity; you can't expect loyalty without demonstrating it yourself.

Maintaining the promises that initially earned their trust is crucial, showcasing your reliability and consistency. Trust hinges on predictability; your actions must align with their expectations consistently. Consistency eliminates the need for customers to seek alternatives, as they rely on your proven track record.

Inconsistent offerings or unmet promises can erode trust. Your historical performance often sets the expectation for future interactions. Consistency in delivering on your commitments reinforces trust, ensuring customers that the reliability they depend on remains steadfast.

CONSISTENCY EXAMPLES

Disney Parks and Resorts:

Disney parks around the world maintain strict standards for customer service, entertainment offerings, and park operations, providing a consistent and magical experience for visitors.

IKEA:

IKEA is known for its standardized store layouts, product designs, and assembly instructions, providing a consistent experience for customers worldwide.

In-N-Out Burger:

In-N-Out Burger is known for its limited menu and strict adherence to quality and freshness standards, ensuring a consistent dining experience.

Starbucks:

Starbucks is known for its consistent coffee quality and customer experience. They have strict standards for their coffee preparation and service, ensuring a uniform experience across their locations.

Berkshire Hathaway:

Berkshire Hathaway, the conglomerate led by Warren Buffett, has historically delivered strong and consistent returns over the long term, generally outperformed the broader market.

FedEx Office:

FedEx Office follows standardized processes for document printing, shipping, and customer service, providing a consistent experience for customers.

Domino's Pizza:

Domino's Pizza has strict procedures for pizza preparation, delivery, and customer service, ensuring a uniform experience for pizza lovers.

Aldi:

Aldi follows a standardized approach to store layout, product selection, and pricing, offering a consistent shopping experience for customers.

H&M:

H&M follows a standardized approach to store layout, product presentation, and pricing, providing a uniform shopping experience across its global locations.

CONSISTENCY CLIENT ASSESSMENT

Please rate the emphasis your client places on Consistency traits within their organization, using a scale from 0 (Not Emphasized) to 10 (Highly Emphasized) and then answer the questions that follow. Recognize that while all traits are valuable, this scale identifies which are particularly prioritized.

Reliability and Punctuality

0 1 2 4 5 6 7 8 9 10

1. Are deadlines and commitments a priority of the client?
2. Does the client view reliability as a key factor in establishing a competitive edge?

Predictability and Continuity

0 1 2 4 5 6 7 8 9 10

1. Does the client invest in and prioritize predictability in its operations and strategic decision-making?
2. Does the client prioritize continuity to ensure long-term stability and trust among stakeholders?

Uniformity and Standards

0 1 2 4 5 6 7 8 9 10

1. Does the client apply uniformity in their processes and customer interactions across different platforms or locations?
2. Does the client distinctly incorporate standardization in their practices as a defining attribute of their operations or service delivery?

Discipline and Rigor

0 1 2 4 5 6 7 8 9 10

1. Does the client demonstrate discipline in their project management and daily operations?
2. Does the client ensure rigor in their analytical approaches and decision-making processes?

Methodology and Stability

0 1 2 4 5 6 7 8 9 10

1. Does the client employ a specific methodology to their work?
2. Does the client maintain stability in their operations, especially when facing industry changes or challenges?

Additional Character Attributes

1. Are there other Consistency attributes or virtues that the client values highly and actively incorporates into their core values, business practices, and interactions? If so, how are these manifested within the client's organization?

CONSISTENCY SELF-ASSESSMENT

Please rate the emphasis you and your organization place on Consistency traits, using a scale from 0 (Not Emphasized) to 10 (Highly Emphasized), and then answer the following questions. Note that while all traits are valuable, this scale identifies which ones are particularly prioritized.

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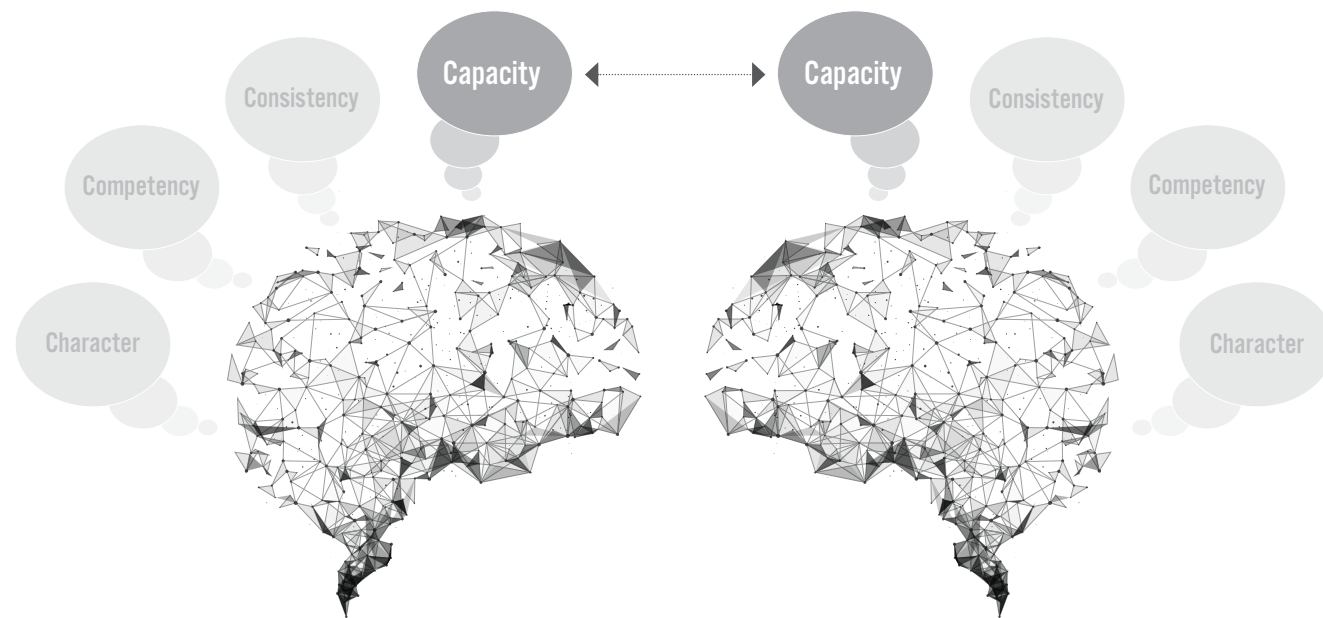
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ASSIGNMENT

To assess the alignment between your values and those of your organization with your clients', compare your scores and responses from this self-assessment with the clients' provided on the preceding page.

CAPACITY



Trust is about alignment

In today's fast-paced business world, trust is paramount. It extends beyond skill to a promise of delivery. Buyers ponder whether you possess the necessary team, funding, and resources to fulfill the task at hand. It's not just about current skills but also the potential for growth and adaptation in a fluctuating market.

This concept was epitomized by IBM during its heyday in the 1970s and 1980s, leveraging the Fear, Uncertainty, Doubt (FUD) principle. IBM challenged the reliability of competitors like Hewlett Packard, emphasizing its own stability and predictability. The common wisdom, "No one ever got fired for buying an IBM computer," highlighted IBM's trustworthiness and the perceived risk of alternatives.

IBM's dominance wasn't just about its size or wealth; it was about its capacity to instill confidence in buyers, ensuring them of unwavering support and expertise. This principle of trust based on capacity—to keep promises, deliver products, and yield returns—remains relevant. In a world brimming with options, the fundamental question remains: Can you deliver? The answer hinges on your capacity to do so.

CAPACITY EXAMPLES

Walmart:

Walmart is one of the world's largest retail chains, known for its extensive network of stores and significant purchasing power, making it a dominant force in the retail industry.

JPMorgan Chase:

JPMorgan Chase is one of the largest and most influential banks in the world, known for its vast resources, extensive branch network, and robust financial services.

Mayo Clinic:

Mayo Clinic is one of the largest and most renowned healthcare organizations globally, known for its comprehensive medical facilities and extensive range of healthcare services.

Amazon:

Amazon is one of the largest e-commerce companies in the world, known for its immense product selection, vast distribution network, and technological resources.

International Committee of the Red Cross:

Provides humanitarian aid in conflict zones, benefiting from a large network and substantial resources.

Kaiser Permanente:

Kaiser Permanente is one of the largest integrated healthcare systems in the United States, known for its extensive network of hospitals and clinics, serving millions of patients.

Microsoft:

Microsoft is one of the largest technology companies in the world, known for its vast resources, extensive product offerings, and global reach in software and technology services.

Facebook:

Being one of the leading social media platforms, Facebook emphasizes capacity by focusing on user reach, audience size, and influence within the digital space.

CNN (Cable News Network):

A prominent news network with a wide international reach, CNN has played a significant role in shaping global news coverage and public opinion.

CAPACITY CLIENT ASSESSMENT

Please rate the emphasis your client places on Capacity traits within their organization, using a scale from 0 (Not Emphasized) to 10 (Highly Emphasized) and then answer the questions that follow. Recognize that while all traits are valuable, this scale identifies which are particularly prioritized.

Resources, Accessibility, and Availability

0 1 2 4 5 6 7 8 9 10

1. Does the client manage and deploy their resources to ensure they are accessible and available when needed?
2. Does the client prioritize strategic investments in resources to maintain a competitive edge, ensuring their services or products consistently outperform in terms of accessibility and availability?

Size and Scalability

0 1 2 4 5 6 7 8 9 10

1. Does the client place importance on the size of its organization, for example workforce, geographic footprint, and market share?
2. Does the client invest in and prioritize their ability to scale operations in their business strategy?

Reach and Network

0 1 2 4 5 6 7 8 9 10

1. Does the client have extensive reach across multiple offices, distinct disciplines, or other factors that enhance their presence in the market?
2. Does the client prioritize building strategic networks, or do they prefer to handle everything internally for better control?

Power and Influence

0 1 2 4 5 6 7 8 9 10

1. Does the client strive to be the most powerful entity within their industry, emphasizing dominance and control in their approach?
2. Does the client focus on leveraging their influence to drive outcomes, or do they prioritize other strategies for achieving their business goals?

Potential and Amplification

0 1 2 4 5 6 7 8 9 10

1. Does the client demonstrate a willingness to invest in individuals showing promising potential, even in the absence of an extensive track record?
2. Does the client actively support and enhance the growth of their internal leadership and new hires, thereby amplifying their capabilities and contributions within the organization?

Additional Capacity Attributes

1. Are there any other Capacity attributes or capabilities that your organization considers crucial to its success and has integrated into its core values? If so, how do these attributes manifest in the way you conduct business and engage with stakeholders?

CAPACITY SELF-ASSESSMENT

Please rate the emphasis you and your organization place on Capacity traits, using a scale from 0 (Not Emphasized) to 10 (Highly Emphasized), and then answer the following questions. Note that while all traits are valuable, this scale identifies which ones are particularly prioritized.

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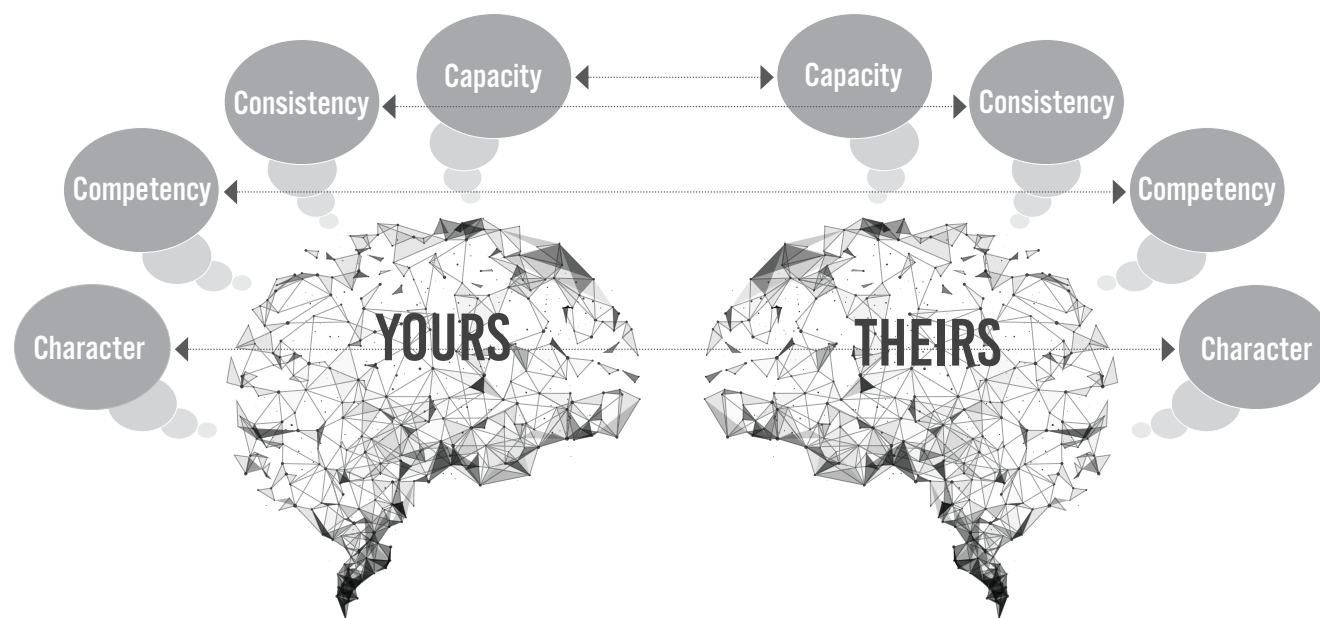
ASSIGNMENT

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Worksheet Part I:

Assessing Stakeholder Standards

This worksheet is designed to guide users through a thoughtful analysis of indirect indicators that can shed light on a stakeholder's standards in competency, character, consistency, and capacity. By carefully considering each aspect, users can gain insights into the values and priorities of their key stakeholders.



Section 1: Competency

1. Nature of Work: Describe the precision and complexity required in the stakeholder's field. Does their work involve high-precision tasks or complex decision-making?
2. Qualifications and Expertise: Look at the qualifications or expertise commonly held by individuals in this organization or field. What level of education or technical skill is standard?
3. Industry Reputation: Consider the stakeholder's reputation within their industry. Are they known for high-quality work or innovation?

Section 2: Character

1. Corporate Policies and Practices: Identify any company policies that reflect moral or ethical values (e.g., sustainability initiatives, community involvement, employee welfare).
2. Public Statements and Branding: Review public statements or branding materials. What values are emphasized?
3. Response to Controversies: How has the stakeholder responded to past controversies or ethical dilemmas?

Section 3: Consistency

1. Service/Product Quality Over Time: Evaluate the consistency in the quality of their products or services. Are there fluctuations, or do they maintain a steady standard?
2. Customer Feedback: Look at customer reviews or feedback over time. Is there a pattern of reliability or consistency in customer satisfaction?
3. Company History: Assess their track record. How has the company evolved, and has it stayed true to its core mission?

Section 4: Capacity

1. Resource Allocation: Examine how the stakeholder allocates resources (e.g., investments in technology, staff training). Does this suggest a focus on growth and scalability?
2. Response to Demand: Consider how they respond to increased demand or challenging situations. Do they scale up effectively?
3. Innovation and Adaptability: Assess their capacity for innovation and adaptability in the face of industry changes or challenges.

Additional Notes:

- Observation of Interactions: Reflect on any personal interactions or experiences with the stakeholder. What can be inferred about their standards and priorities?
- Competitor Comparison: Compare the stakeholder's practices and policies with those of their competitors. How do they measure up in terms of these four areas?

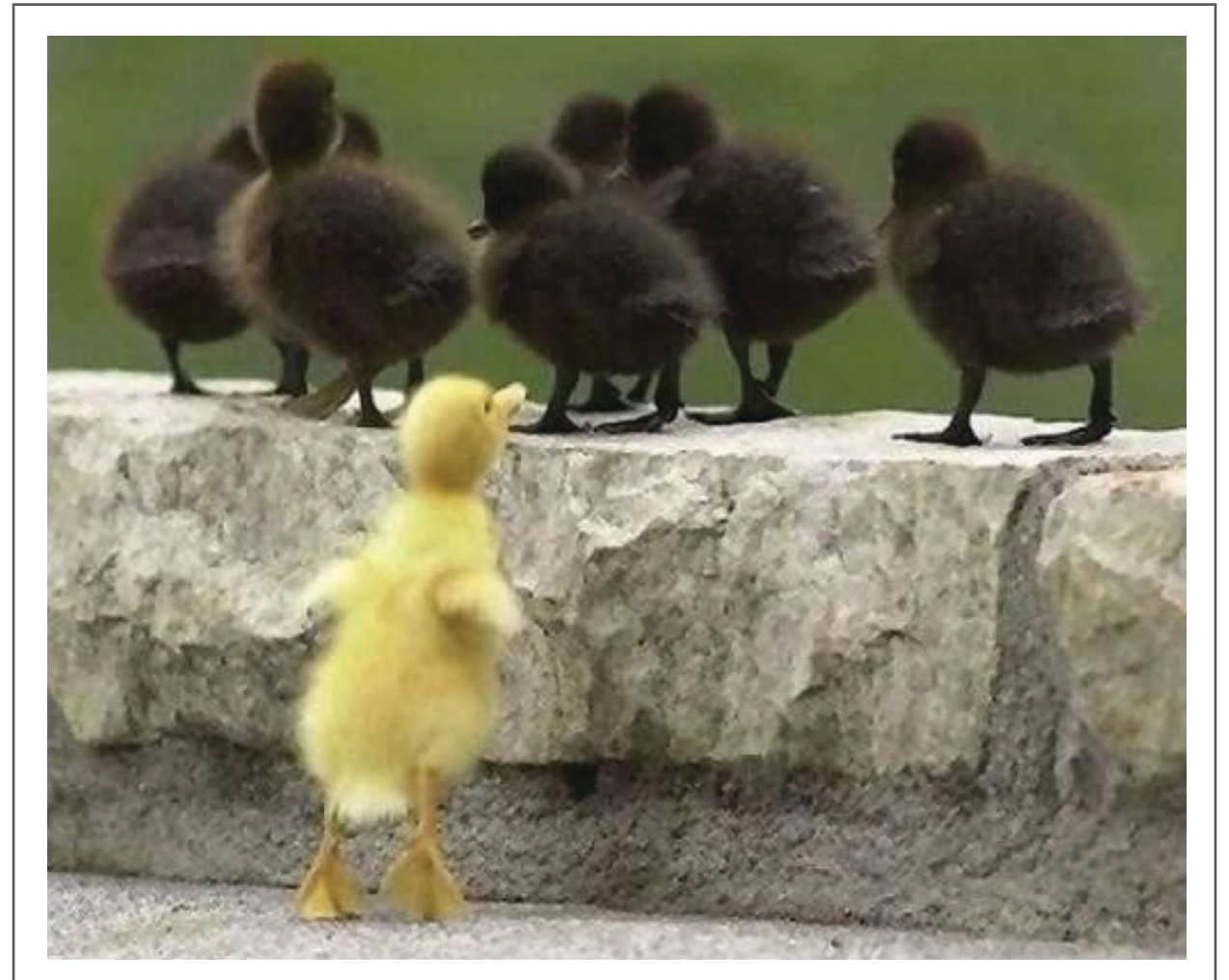
Do you make their lives

EASIER?

PREFACE

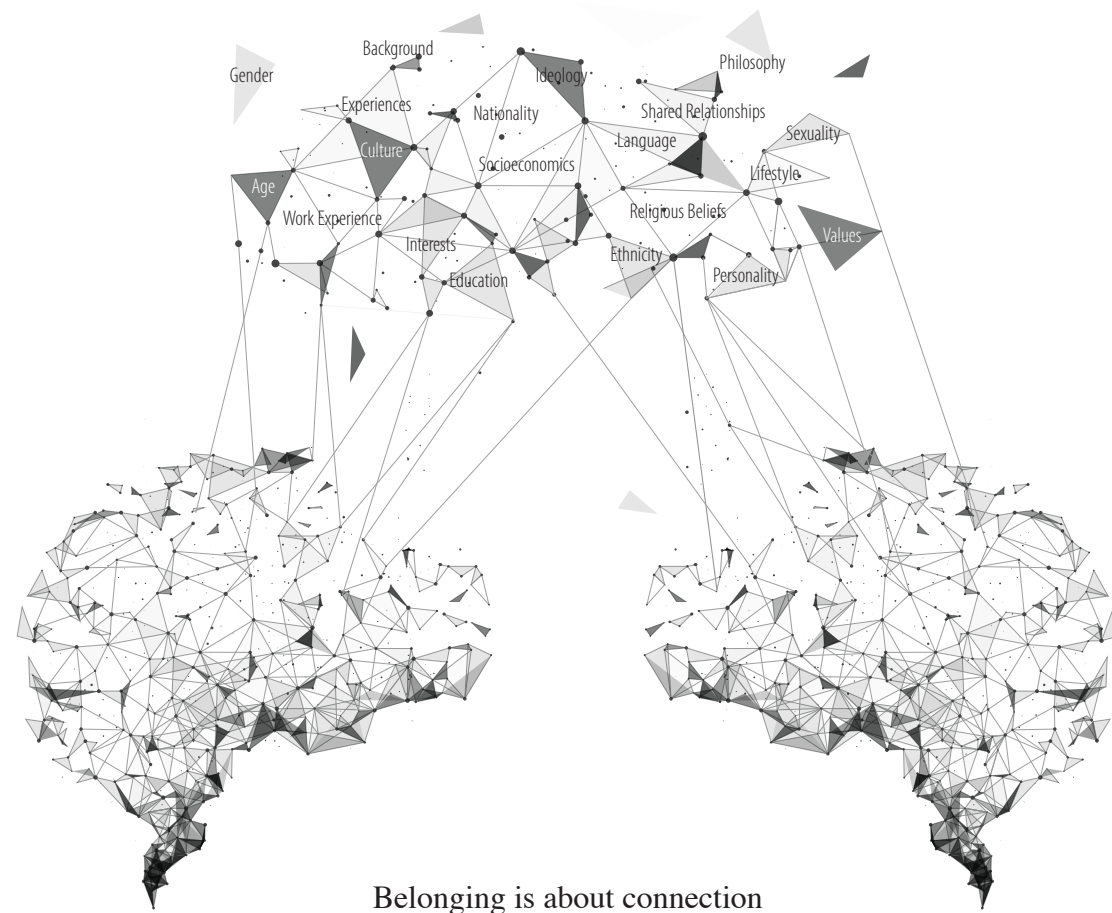
Before developing a strategy and tactics for making your relationship's lives easier, you need to spend time thinking about what is making their lives harder. What consumes most of their time? What are the complexities of their job, industry, markets, etc.? What are the most challenging aspects of their career/life? Is time their biggest challenge? Access? Knowledge? Money? Technology? Support? Influence? Representation? Diversity?

Establishing a sense of belonging is the key to making someone's life easier. Acknowledging that everyone is one of a kind. Anticipating their worries and hopes, struggles, and opportunities. Being proactive in solving their issues before they even pick up the phone. Letting them know they are accepted, valued, cherished, and necessary. Extending an identity they can identify with or look up to through common objectives and shared values. It is impossible to make someone's life easier if you don't know who they are and comprehend what they truly care about and need.



A SENSE OF BELONGING

AWARENESS



Belonging is about connection

In today's fast-paced business world, trust is paramount. It extends beyond skill to a promise of delivery. Buyers ponder whether you possess the necessary team, funding, and resources to fulfill the task at hand. It's not just about current skills but also the potential for growth and adaptation in a fluctuating market.

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AWARENESS EXAMPLES

Ohio District 5 Area Agency on Aging

The Ohio District 5 Area Agency on Aging is, an organization dedicated to helping older adults and individuals with disabilities live safely and independently in their homes for as long as possible, created an "Awesome Wall" where employees can pin notes giving kudos to their coworkers and teams. This not only shows people that their hard work is seen and appreciated, but gives leaders more visibility into day-to-day wins, allowing them to reach out and share their appreciation.

REI

The outdoor clothing and gear co-op, REI, closed all its stores on Black Friday, the busiest shopping day of the year, to encourage employees and consumers to spend the day outdoors with their families and friends, or allow them to do their Christmas shopping on that day, too.

Wieden+Kennedy

Advertising giant, Wieden+Kennedy's "Thank You Mom" commercials, created for Procter & Gamble's (P&G) sponsorship of the Olympics, were highly effective in demonstrating awareness of customers because they tapped into deep emotional connections and values rather than focusing solely on product sales. The commercials said to mothers (P&G consumers) "We know who you are and what you do for your kids." They focused on the universal emotion of gratitude towards mother's support and sacrifice and told compelling stories about the journey of athletes and the crucial role mothers played in their success.

Wegman's

Wegman's, the popular American supermarket chain understands the challenge for those who struggle with their weight and those with eating disorders to be around food all day long. It created a Wellness Program that includes customized yoga programs, subsidized Weight Watchers at Work meetings and employee fitness discounts.

Allegheny County Airport Authority

The Pittsburgh International Airport opened a child care facility to accommodate its thousands of employees, many of which are single parents, who have no other affordable means of child care while they are at work.

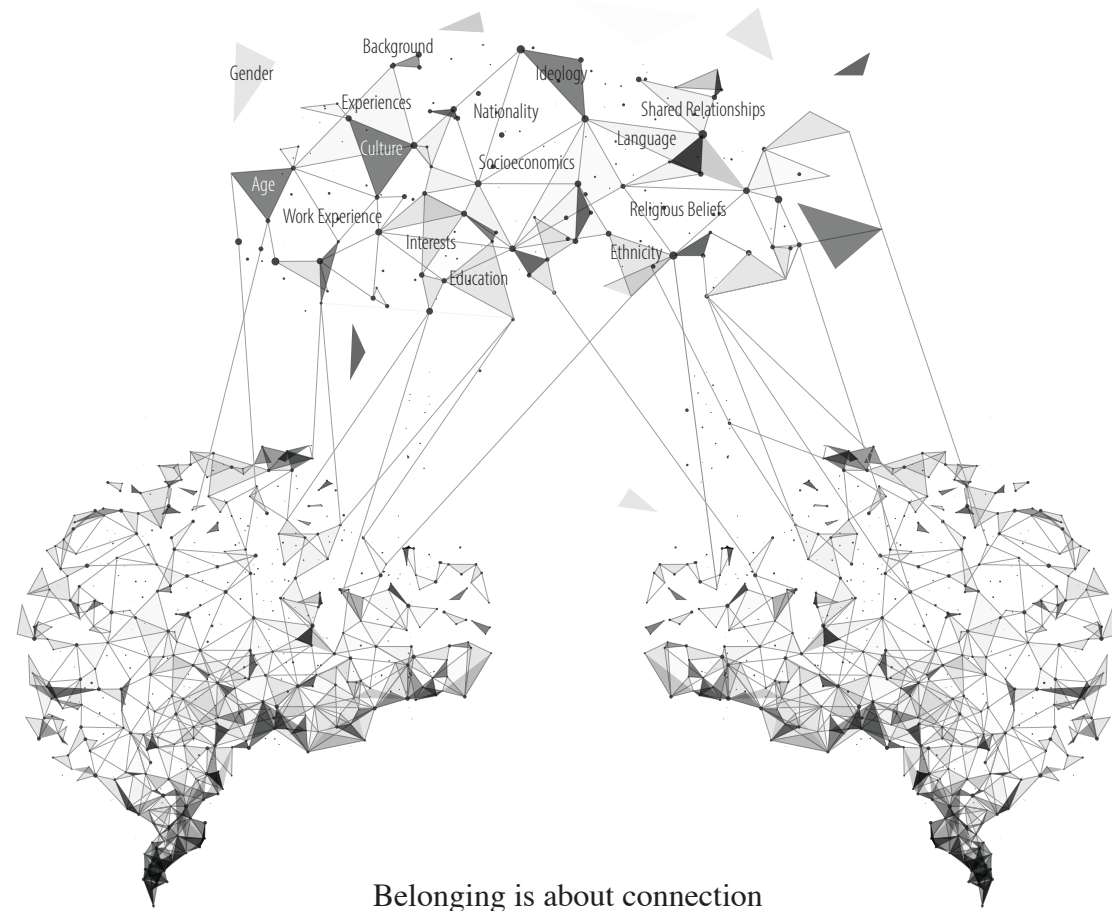
Market Basket

Market Basket's profit-sharing plan provides a generous financial cushion for both their full-time and part-time employees. This not only allows them to share in the company's success, but it also gives them a sense of ownership and financial stability for their retirement. This is an invaluable benefit in the food market industry, where retirement security is a major concern.

AWARENESS ASSESSMENT

1. How often do you conduct surveys or gather feedback from your clients, customers, and employees to understand their needs, preferences, and satisfaction levels?
2. Do you have a dedicated team or department responsible for managing and improving client, customer, and employee relationships?
3. Are there any established communication channels or platforms through which clients, customers, and employees can reach out to you with their concerns, suggestions, or feedback?
4. Are there any training programs or initiatives in place to educate your employees about the importance of strong client, customer, and employee relationships, and how to effectively manage and nurture them?
5. Do you have a system in place to capture and store relevant information about your clients, customers, and employees, such as their preferences, interests, and personal milestones?
6. How do you use the collected data and insights about your clients, customers, and employees to tailor your products, services, or interactions with them?
7. Are there any initiatives or programs in place to proactively engage with your clients, customers, and employees on a personal level, such as sending personalized messages or recognizing important milestones in their lives?
8. Do you provide opportunities for your clients, customers, and employees to provide input or contribute to the decision-making process, making them feel valued and part of your organization?
9. How do you ensure that your employees have the necessary resources and tools to understand and cater to the unique needs and expectations of your clients and customers?
10. How do you measure and track the success of your efforts in recognizing and treating your clients, customers, and employees as unique individuals rather than just numbers?

INSIGHT



Belonging is about connection

To make key relationships feel valued, it's crucial to deeply understand not just their offerings but also their challenges and needs. Empathy goes beyond surface interactions, allowing you to grasp the intricacies of their experiences and foresee unacknowledged needs.

Insight means grasping unspoken thoughts and feelings, a skill that deepens with closer connections. People tend to share more private aspects of their lives as trust grows, entrusting you with their hidden fears and ambitions. These concealed parts of ourselves—our anxieties and dreams—are often where we most need support. Contrary to the romantic notion that relationships are primarily about love, the deeper truth is that they're about finding allies who help us navigate life's toughest challenges. By cultivating insight, you position yourself as a trusted partner in addressing their challenges and achieving their goals.

INSIGHT EXAMPLES

Procter & Gamble:

Procter & Gamble is known for its deep commitment to consumer research. The company spends extensive time living with consumers, shopping with them, and working alongside them to gain valuable insights into their preferences and needs.

Airbnb:

Airbnb actively seeks to understand the needs and preferences of both hosts and guests. They gather feedback through reviews, surveys, and host forums to continuously improve the platform and user experience.

Zappos:

Zappos is known for its exceptional customer service and commitment to understanding customer preferences. The company engages in active listening, conducts user interviews, and gathers feedback to enhance the shopping experience.

80,000 Hours

80,000 Hours is a non-profit organization that helps people to find the most effective ways to use their careers to make a difference in the world.

GiveWell

GiveWell is a non-profit organization that researches and recommends charities that are doing the most good per dollar. GiveWell's research team conducts a rigorous evaluation of charities based on their effectiveness, transparency, and cost-effectiveness.

Activision Blizzard

Activision Blizzard uses data from its Call of Duty games to identify popular weapons, maps, and game modes, as well as playtime, game preferences, and in-game purchases. This data is then used to develop new content and balance the games.

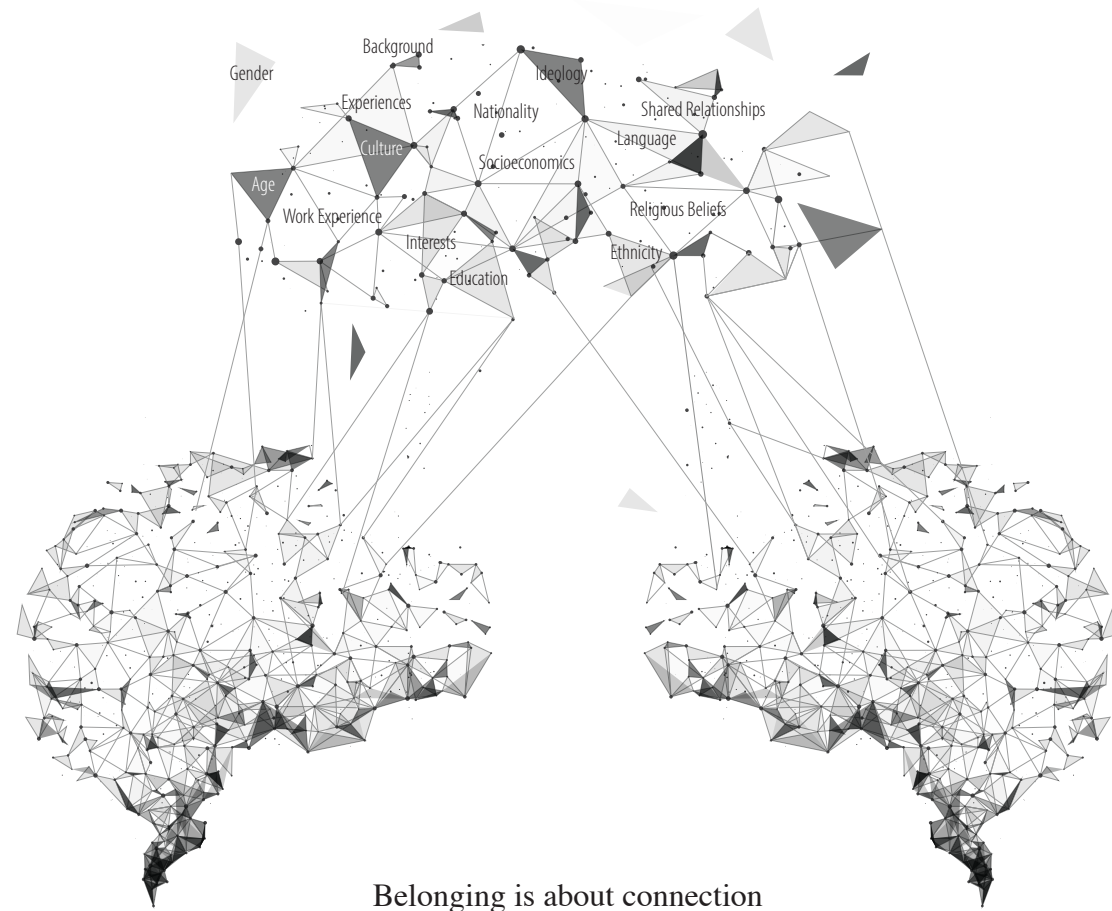
MyFitnessPal

MyFitnessPal, a popular health and fitness app, excels in understanding its users' needs and goals through a combination of data analytics and user interaction. By tracking users' exercise routines, dietary habits, and personal health data, MyFitnessPal gains valuable insights into their individual health and fitness aspirations. Through features like food logging, calorie tracking, and personalized exercise recommendations, the app provides tailored suggestions and content that align with each user's specific goals, whether it's weight loss, muscle gain, or overall well-being. Additionally, MyFitnessPal leverages user feedback and behavior patterns to continuously refine its offerings, ensuring a seamless and personalized experience for all users.

INSIGHT ASSESSMENT

1. How do you actively gather and analyze information to understand your clients' evolving needs and wants?
2. What methods do you use to stay informed about your clients' emerging desires and expectations?
3. How do you identify and address the fears and concerns that may affect your clients' decision-making?
4. In what ways do you explore and support your clients' ambitions and long-term goals?
5. How do you assess and mitigate the deficiencies your clients face in achieving their objectives?
6. What processes do you have in place to ensure continuous feedback from your clients to refine your understanding of their requirements?
7. How do you incorporate client insights into your product development or service enhancement strategies?
8. How do you tailor your communication and marketing efforts to resonate with your clients' identified needs and desires?
9. What role does client feedback play in your organization's strategic planning and decision-making processes?
10. How do you measure the effectiveness of your strategies in meeting your clients' needs and exceeding their expectations?

FORESIGHT



Belonging is about connection

Reflect on groundbreaking innovations like the automobile, the Internet, and cell phones, which initially didn't seem vital. Henry Ford famously hinted at this, suggesting people would have preferred "faster horses" instead of cars. Yet, these inventions have become indispensable in our lives.

How did these pioneers craft solutions for needs that weren't apparent? They excelled in anticipating future demands, a skill rooted in the human tendency to cooperate and reciprocate aid. Being proactive, addressing needs before they arise, sets you apart, making you an essential ally.

By blending awareness with insight and proactivity, you can provide unparalleled value in your relationships and embed this approach into your organization's ethos. Recognizing and preemptively meeting people's needs strengthens bonds, making you a cherished partner.

FORESIGHT EXAMPLES

Rocky Mountain Chapter of the Special Libraries Association

The Rocky Mountain Chapter of the Special Libraries Association (SLA) has implemented a "buddy" system to make attending chapter events a more comfortable and enjoyable experience for members. These "buddies" will connect with members who may feel uneasy about attending an event alone, and will plan to attend with them. Moreover, the buddy will be a connector, introducing the member to other colleagues and helping them create relationships.

Grand Del Mar

At the Grand Del Mar resort in San Diego, CA, the staff are trained to anticipate guests' needs, not simply react to requests. Mention you and your family are off to the beach the following day, and you'll be pleasantly surprised to find a package of sand toys awaiting your arrival in your room or car - no need to worry about bringing your own pail and shovel!

Safelite Auto Glass

Safelite Auto Glass anticipates their customers' potential anxiety regarding a stranger coming to their home or office and working on their vehicle. In addition to emailing the customer a confirmation of the scheduled appointment, Safelite sends a photo of the technician doing the work and a short biography outlining their experience and qualifications.

Homestead Kitchens

When Homestead Kitchens of Littleton, MA, takes on a kitchen building and installation project, they understand the hassle of being without one. To make the process easier, they proactively anticipate their customers' needs by providing gift certificates and coupons to nearby restaurants they've cultivated partnerships with, so family members can have their meals taken care of during the construction.

Slack:

Slack's intelligent features, like suggesting channels and people based on user activity, aim to proactively assist teams in communication and collaboration.

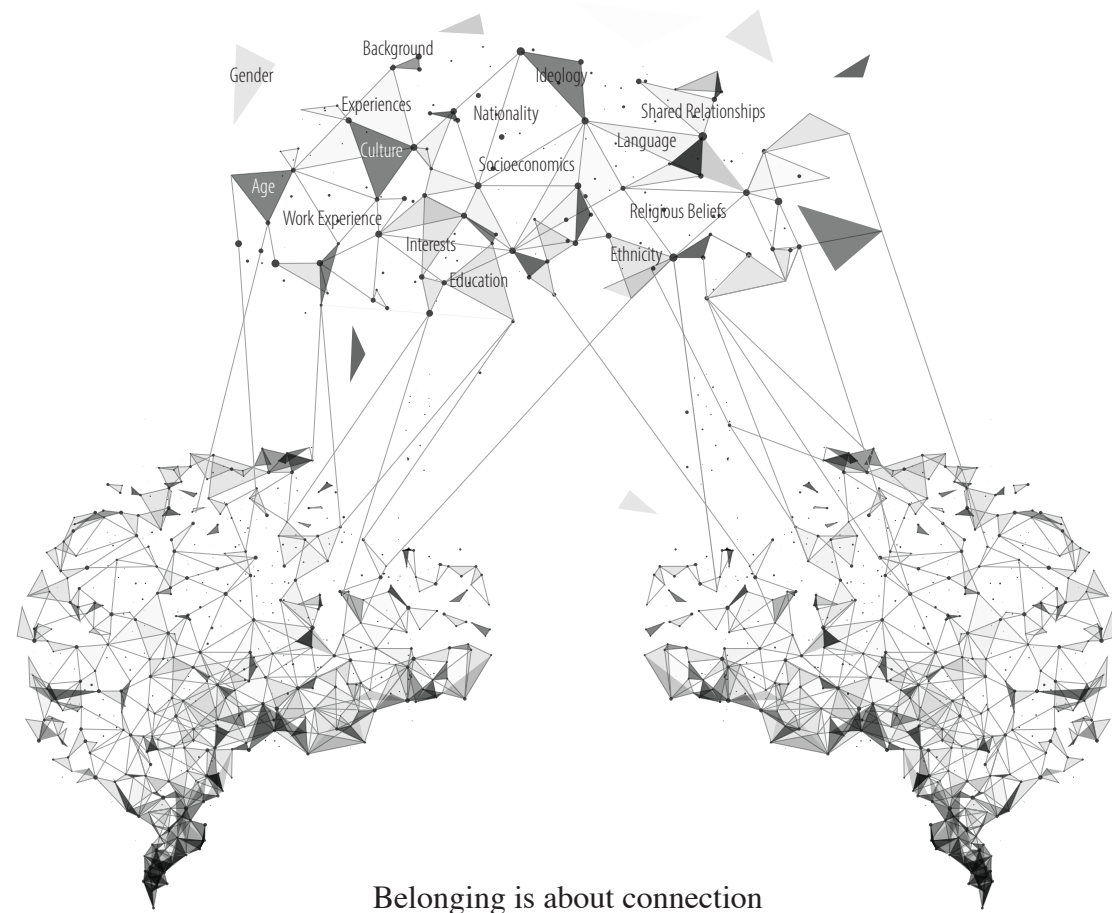
Warby Parker

Warby Parker allows customers to select up to five frames to try on at home for free. This proactive approach eliminates the need for customers to visit physical stores, making the process convenient and hassle-free. In addition, their website features a virtual try-on tool that uses augmented reality to allow customers to see how different frames will look on their face, as well as an interactive questionnaire that helps customers discover frames that best suit their face shape, style preferences, and lifestyle.

FORESIGHT ASSESSMENT

1. How do you anticipate changes in your clients' industries that could affect their future needs and wants?
2. What tools and methods do you use to predict emerging trends that may influence your clients' preferences and behaviors?
3. How do you assess the long-term impact of current market dynamics on your clients' strategies and operations?
4. In what ways do you engage with thought leaders and experts to gain insights into potential future challenges your clients may face?
5. How do you incorporate future-oriented thinking into your service or product development to stay ahead of your clients' evolving needs?
6. How do you ensure your team remains agile and adaptable to rapidly respond to unforeseen changes in your clients' environments?
7. What processes do you have in place to regularly review and update your understanding of your clients' long-term goals and potential obstacles?
8. How do you use data analytics and forecasting to enhance your strategic planning for meeting future client requirements?
9. How do you cultivate a culture of innovation within your organization to proactively address potential future needs of your clients?
10. How do you evaluate the success of your foresight efforts in terms of client satisfaction and retention?

FORESIGHT



Belonging is about connection

In a loyal relationship, inclusion is key, transforming simple transactions into equitable partnerships. Transactional relationships, prone to dissolution, hinge on immediate benefits. Participants remain only if their needs are met and defect for marginally better offers.

Conversely, lasting relationships embrace mutual engagement, valuing more than just transactions; they're about reciprocal involvement and action on each other's suggestions. Inclusion transcends mere attendance, requiring active participation in various communications like emails, social media, and phone conversations.

To foster a sense of belonging, it's essential to not only acknowledge but also to value each individual by being responsive, collaborative, and open to their contributions. This holistic approach to inclusion strengthens the relationship by ensuring all parties feel genuinely valued and understood.

INCLUSION EXAMPLES

Lego

LEGO has a robust and highly effective process for engaging with customers to gather development ideas. By utilizing numerous inclusion channels, such as an Ideas Platform, Ambassador Network, conferences and events, user groups, social media, and crowdsourcing—LEGO actively engages with its customer community and gathers development ideas. It ensures that the products it creates resonate with the interests and preferences of its fan base. This collaborative approach has been instrumental in LEGO's ongoing success and its ability to deliver products that captivate the imaginations of builders of all ages.

Epic Games

Epic Games, the company behind popular video games like Fortnite and Unreal Engine, actively engages with its customer base to gather development ideas through Community Forums Wish Lists, beta testing, and gaming events, ensuring that their games and platforms evolve in ways that align with player interests and preferences.

Cargill:

This Minneapolis-based food producer and distributor utilizes an "Everyday Performance Management" system to strategically incorporate encouragement, feedback, and motivation into daily, on-the-job conversations between employees and manager. By shifting its focus from annual reviews to ongoing conversations — and feedback from a retrospective to forward-facing approach — Cargill realized it could impact performance by nearly 40%. Almost 70% of Cargill employees reported that they feel valued and have received useful feedback from superiors.

Gore-Tex

Gore-Tex, or W. L. Gore & Associates, is known for its unique corporate culture, which includes what is referred to as an "Open Book" management policy. This policy is a fundamental aspect of the company's approach to transparency and employee involvement in decision-making. The company openly shares financial information, performance metrics, and other key data with all of its associates (employees). This includes details about sales, profits, costs, and other financial aspects of the business. Associates have access to this information, and they are encouraged to understand and discuss it.

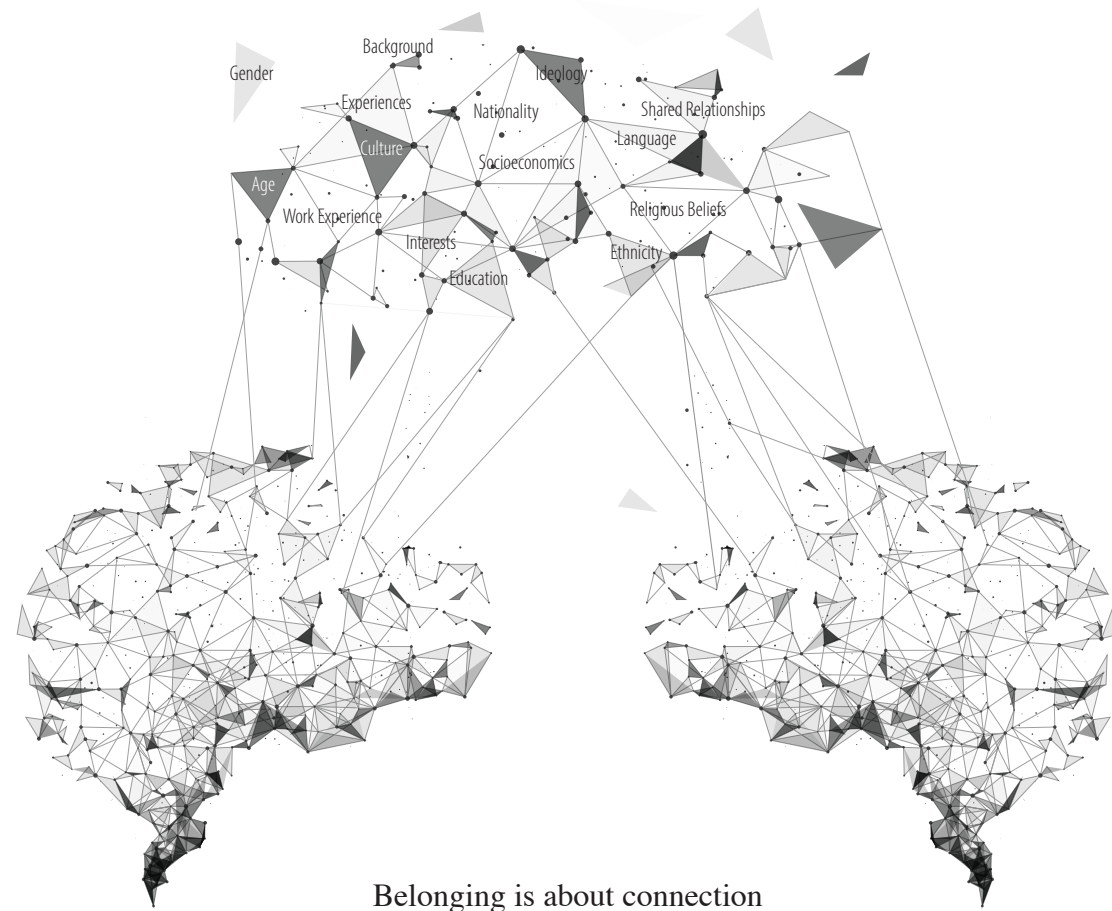
Zappos

It's not easy to find a retail company that is transparent with employees, buyers, and vendors. Online shoe store Zappos is an exception to the rule. Since their founding, they have fostered innovative ways to create transparency. Most notably, Zappos created an employee-written blogosphere. Within this forum, readers stay up to date on the inner workings of the entire business.

INCLUSION ASSESSMENT

1. How do you proactively incorporate diverse perspectives and experiences into your decision-making processes?
2. How do you tailor your strategies to address the distinct needs and preferences of your varied client demographic?
3. What initiatives do you implement to ensure individuals from all backgrounds are acknowledged and valued?
4. How do you foster an environment where open and transparent communication is encouraged, particularly from traditionally underrepresented voices?
5. How do you create avenues for your employees and clients to contribute to shaping the vision and objectives of your organization?
6. What actions do you undertake to integrate inclusivity into your core values and ensure it permeates every level of your company?
7. How do you track and share the advancements you're making towards cultivating a truly inclusive culture for your clients and staff?
8. What measures do you put in place to guarantee that all stakeholders have equitable access to the information and tools needed for meaningful engagement?
9. How do you maintain transparency about your organizational ambitions, hurdles, and achievements to nurture a communal sense of ownership among clients and staff?
10. What established mechanisms or platforms do you offer for clients and employees to suggest and lead innovative ideas or projects?

IDENTITY



Belonging is about connection

We naturally gravitate towards people who reflect parts of ourselves, driven by a deep-seated need for belonging and self-validation. This tendency is evident in social settings like conferences, where people often group with others who share similar traits.

In building professional relationships, it's not just about connecting with those who match your team's demographics. It's crucial to communicate your organization's distinct identity and values. This approach opens doors to finding common ground, fostering comfort, and igniting inspiration, whether through unique branding, shared interests, or expressing core values.

The goal is to cultivate relationships that are both secure and deeply resonant, with people who share our values and genuinely care. It's about creating bonds with those who truly understand and reflect the essence of who we are.

IDENTITY EXAMPLES

Southwest Airlines

Herb Kelleher founded Southwest Airlines with a deep-seated conviction that everyone involved with the company should have a thoroughly enjoyable time. He hand-picked employees for their great sense of humor, created imaginative commercials, instructed pilots and attendants to enliven their safety instructions with humor, and sought to build a company that is as human as the human beings in it.

Bombas

Bombas is revolutionizing the way we donate to the homeless. Through their buy-one, give-one model, for every pair of socks they sell, they donate a pair to someone in need. The brand's bee logo serves as a reminder of the "bee better" motto, and just how much of a difference our small purchases can make.

Oddbox

An estimated one-third of the food produced globally is never eaten due to failing to meet the strict specifications set out by supermarkets. That's why Oddbox is fighting back, by rescuing misshapen fruit and vegetables and delivering them straight to households who are just as passionate about making a difference.

Steinway and Sons

Few organizations weave identity into their sales and service tapestry like Steinway and Sons. Nearly all of their customer-facing employees are musicians who appreciate the thought-process that goes into the purchase of an instrument. Especially one that costs upwards of \$50,000!

Nike

Nike's approach transcends mere product sales; it's about marketing aspirations, dreams, and narratives. While relatability matters, Nike understands the power of aspiration. They aim to connect customers with their dreams, recognizing that we're also profoundly influenced by those we strive to emulate. Those figures we look up to, mimic, and endeavor to match in terms of success, wealth, fame, or admiration. Nike's mission is clear: they sell hope to those aspiring to become their own heroes.

Howard Stern

Howard Stern's success can be attributed to his exceptional ability to connect with his audience on a deeply personal level. He had an innate understanding of the questions, concerns, and curiosities that resonated with them and could be as irreverent and immature as they were. By addressing these topics openly and honestly, Stern created a unique and authentic rapport with his listeners.

IDENTITY ASSESSMENT

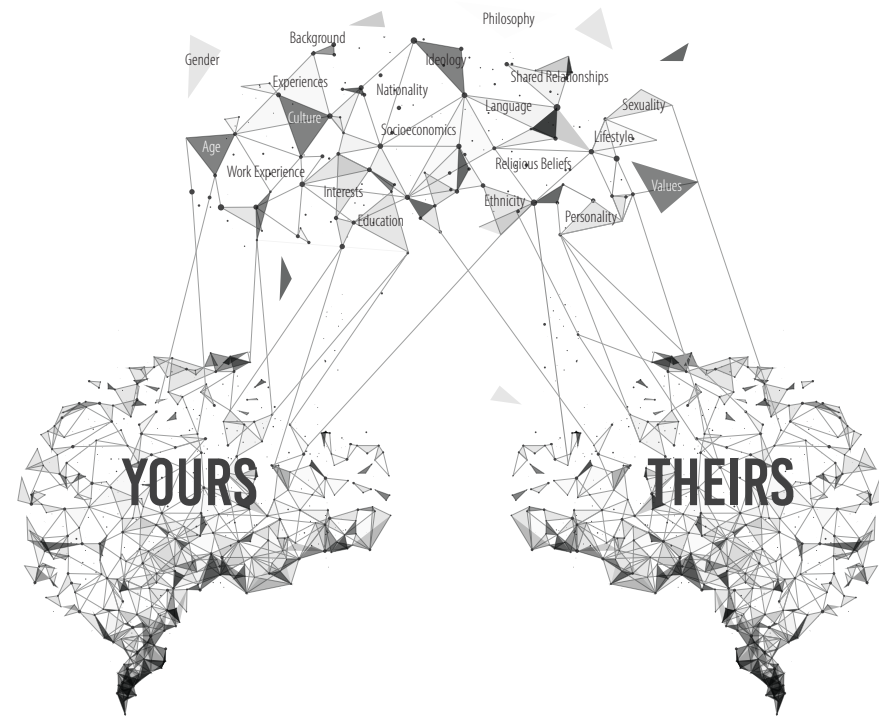
1. How effectively do you communicate and highlight your shared interests, beliefs, experiences, and values with your clients, customers, employees, and stakeholders?
2. In what ways do you showcase your background and experiences to establish a sense of familiarity and trust?
3. How do you ensure that your organization reflects the aspirations of your relationships or that they take pride in their affiliation with you?
4. Are you transparent about your organizational identity, including your mission, vision, and core beliefs?
5. Are you intentional about finding common ground and shared aspirations with your key relationships?

6. Do you actively seek feedback from your relationships on how well your identity aligns with theirs?
7. How do you demonstrate that you understand and respect the unique identities of your clients and stakeholders?
8. How do you actively engage with your clients and customers to learn about their values and aspirations?
9. How do you measure and track the effectiveness of your identity alignment efforts?
10. Are you agile in adapting your identity to align with the changing needs and values of your relationships?

Worksheet Part II

Self-Evaluation on Stakeholder Engagement

This self-evaluation is designed to encourage individuals to reflect on their interactions with stakeholders and their effectiveness in demonstrating recognition, insight, foresight, inclusion, and identity. By addressing these questions, individuals can identify strengths and areas for improvement in their stakeholder engagement strategies.



Recognition of Stakeholders

1. Awareness: How regularly do you engage with or gather feedback from stakeholders?
2. Responsiveness: How do you respond to stakeholder concerns or needs?
3. Adaptability: How have you adapted your strategies or actions based on stakeholder input?

Insight

1. Understanding Needs: How do you stay informed about your stakeholders' unspoken needs or challenges?
2. Empathy: How do you demonstrate empathy towards your stakeholders' situations or perspectives?

Proactive Solutions: Can you provide examples where you anticipated and addressed stakeholders' needs?

Foresight

1. Future Planning: How do you incorporate stakeholder interests in your long-term planning?
2. Predicting Trends: How do you stay ahead of trends or changes that could affect your stakeholders?
3. Preemptive Action: Describe a situation where you took preemptive action to benefit stakeholders before a problem arose.

Inclusion

1. Engagement: In what ways do you actively involve stakeholders in decision-making or feedback loops?
2. Valuing Diversity: How do you ensure diverse stakeholder voices are heard and considered?
3. Creating a Sense of Belonging: What actions do you take to make stakeholders feel valued and part of your mission?

Identity

1. Shared Values: How do you communicate and align your values with those of your stakeholders?
2. Brand Representation: How does your personal or organizational identity resonate with your stakeholders?
3. Community Building: What steps do you take to build a community or sense of shared identity among your stakeholders?

Reflection:

- Alignment with Stakeholder Standards: Reflect on how your actions and decisions align with the competency, character, consistency, and capacity standards of your stakeholders.
- Areas for Improvement: Identify areas where you could enhance your engagement with stakeholders based on this self-evaluation.

Do you make their lives

BETTER?

PREFACE

Before developing a strategy and tactics for making the lives of your relationships Better, you need first to spend time thinking about what is making their lives unfulfilled. What gives their life meaning? What causes do they support? What are their aspirational goals? What do they value? What principles and ideals do they respect?

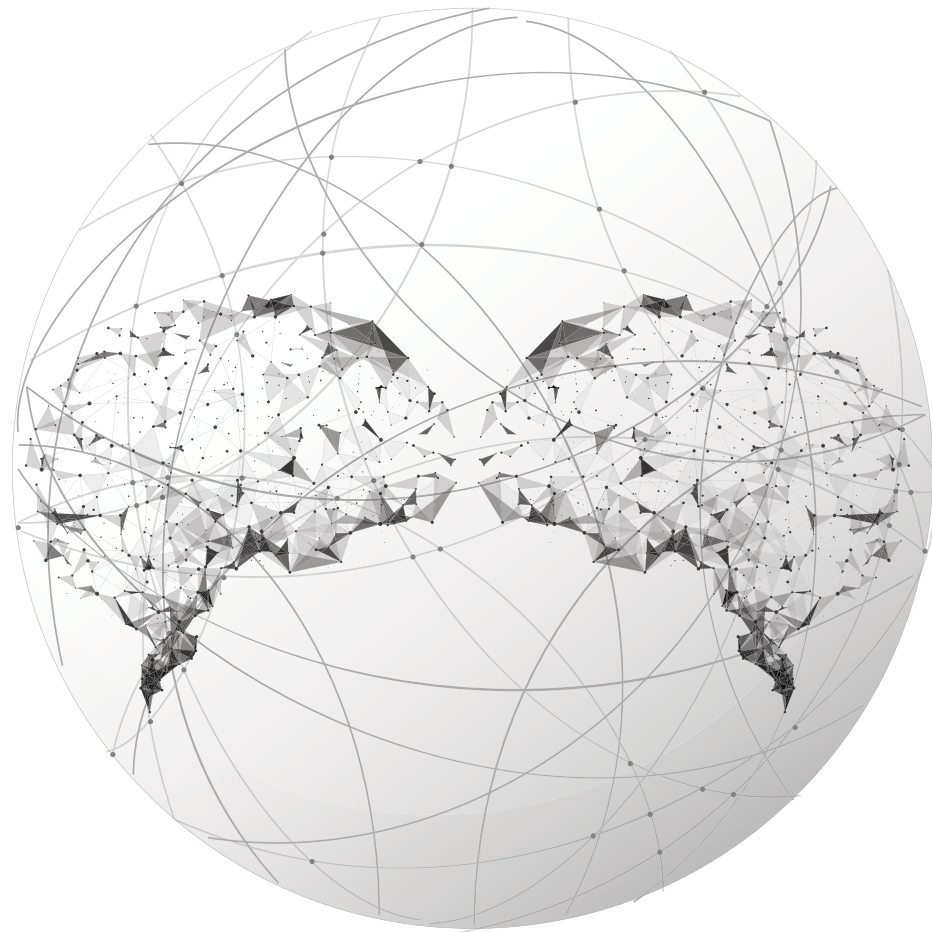
From the majestic sequoias to the tiniest moss, the drive to seek a better existence is a core force that unites all living organisms. This universal pursuit is not just a philosophical concept, but a tangible biological reality rooted in the very essence of our being. Like reaching roots and unfurling petals, the innate need to grow, expand, and flourish is integral to our nature and how we operate.

Flourishing—seeking a Purpose—is not just an abstract desire, but an evolutionary advantage that supplies living things with the resources and opportunities to gain an advantage in their environment. For humans, the pursuit of a better life is a natural extension of our biological heritage. In understanding this fundamental drive, we gain insight into the true essence of life—to grow, to thrive, and to succeed in a competitive world.



A SENSE OF PURPOSE

CLARITY



Clarity in purpose for an individual or an organization transcends a mere understanding of goals; it embodies a profound, unequivocal insight into the deep-seated motivations and ambitions that propel one's journey. This clarity is not superficial but rooted in a comprehensive introspection that seeks to unveil the core 'why' behind one's aspirations—be it the pursuit of wealth, the desire to wield significant influence, the drive to make a meaningful societal impact, or the ambition to innovate and pioneer new frontiers.

Such resolute clarity is indispensable as it informs and shapes every strategic decision, guiding individuals and organizations like a lighthouse through the tumultuous sea of challenges and opportunities that lie ahead. By transforming abstract dreams and aspirations into concrete, actionable objectives, clarity ensures a purposeful and directed endeavor towards achieving what truly resonates with one's core values and ultimate vision. It ensures that every initiative undertaken, every decision made, is in service to that overarching purpose, thereby streamlining efforts and resources towards achieving meaningful and fulfilling outcomes.

CLARITY EXAMPLES

Radio Flyer

Radio Flyer has a simple objective: create an innovative environment where every employee can say, "This is the best job I've ever had." To reach that goal, the company offers programs and benefit options, including summer flex hours, an on-site gym, two days off per year to volunteer in the community, development workshop opportunities, and committees surrounding various Flyers' interests.

Patagonia

Patagonia is the embodiment of a purpose-driven brand. In 2018 they changed their mission from "Build the best product, cause no unnecessary harm, use business to inspire and implement solutions to the environmental crisis" to a very purpose-driven mission "Patagonia is in business to save our home planet."

Khan Academy

Khan Academy's purpose is to provide a free, world-class education for anyone, anywhere. They accomplish this by offering a vast library of educational resources in multiple languages, accessible to anyone with an internet connection.

Addidas

One of the ways Addidas promotes sustainability and make it part of their culture is their new employee training called "How to Think and Act Sustainably", where they offer employees the opportunity to contribute towards a more sustainable world through their day-to-day actions. This four-week training combines self-study and conversations with colleagues from across the globe to make employees aware of how they practice sustainability through a different lens, with a different starting point and with diverse possibilities to make a change.

LUSH

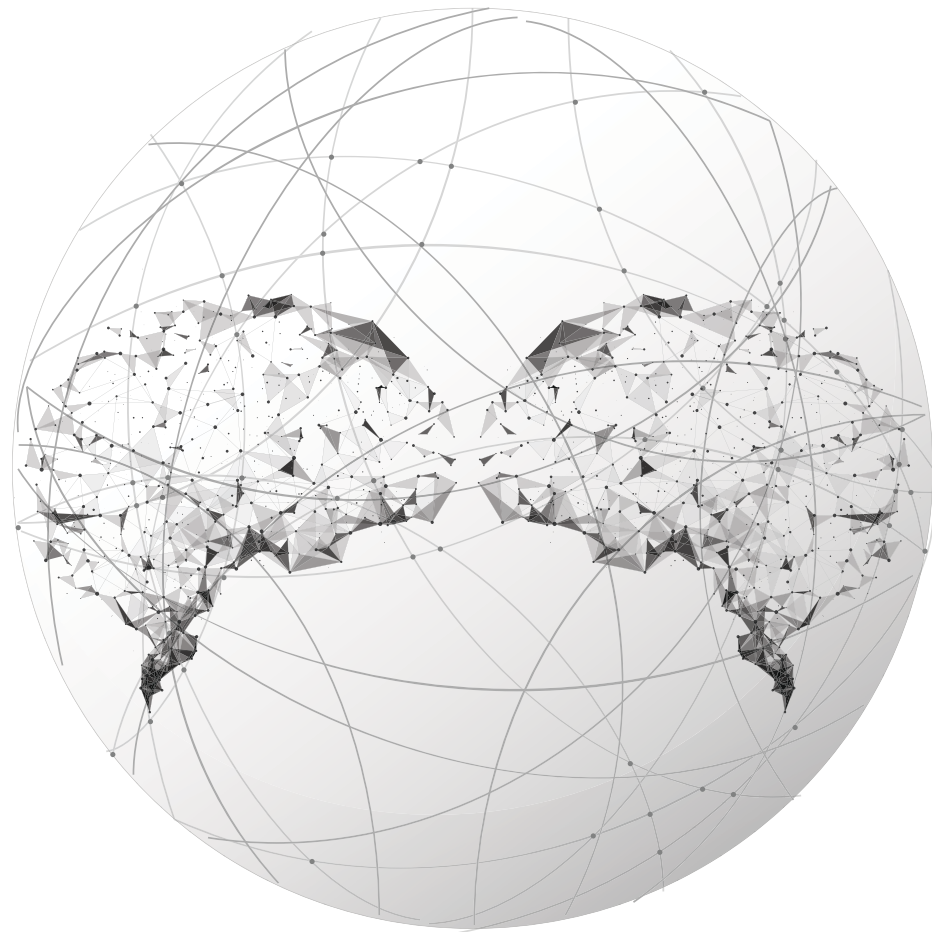
Lush has been invested in sustainability from the start; it's part of their DNA. They create solid beauty bars like shampoo, conditioners and cleansing balms to reduce water usage and plastic packaging. It's fair to say that they are leaders as they have been doing this and innovating in this area since 1980.

In 2021, they have decided to take on a leadership role again by shutting down all their social media accounts. As Lush CEO Mark Constantine puts it, "I've spent all my life avoiding putting harmful ingredients in my products. There is now overwhelming evidence we are being put at risk when using social media." This action comes in the wake of revelations from Facebook whistleblower Frances Haugen.

CLARITY ASSESSMENT

1. Can you articulate the core purpose that guides your client's direction?
2. How does this purpose align with your client's daily operations and long-term objectives?
3. Can you share an instance where your client's purpose became particularly evident or was reinforced?
4. How does your client distinguish between their overarching purpose and specific goals or targets?
5. In which of your client's current or upcoming projects is their purpose most vividly reflected?
6. How does your client navigate choices that appear to conflict with their stated purpose?
7. What practices are in place to keep your client focused on their purpose amidst potential distractions?
8. How does your client communicate their purpose to various stakeholders?
9. How does this purpose influence your client's decision-making and allocation of resources?
10. What processes does your client have for periodically reassessing and refining their purpose?

FELLOWSHIP



Fellowship in the pursuit of shared goals extends far beyond mere collaboration, creating a nurturing community that significantly elevates and resonates with individual aspirations. This enriched sense of fellowship fosters a profound sense of unity, belonging, and reciprocal support among individuals and groups united by similar visions and values. As a result, this collective becomes a potent force, harmonizing efforts towards shared objectives and markedly enhancing the group's ability to achieve noteworthy milestones.

More than just improving efficiency in goal attainment, this fellowship imbues the journey with a wealth of shared experiences, diverse perspectives, and the invaluable collective wisdom of the community, making the process not only more impactful but deeply fulfilling. It transforms isolated efforts into a unified collaboration, celebrating common achievements and fostering an environment ripe for mutual growth and support. In doing so, this fellowship enriches the pathway towards shared goals, making it a more comprehensive and rewarding experience for all participants involved.

FELLOWSHIP EXAMPLES

The Grateful Dead

The Grateful Dead were committed to anti-authoritarian values and a benevolent view of humanity. This did not just come through in their music but in how they ran their business and treated their fans. While most musical artists take extraordinary measures to protect their copyrights and trademarks, the Dead allow fans to tape record their concerts and share the bootleg copies with one another. Rather than hurting the Grateful Dead's business, their fellowship with fans made them more successful. Fans shared tapes which drew even more people to their scene. The Dead lived the values they sang about and created a fan base that continues to grow after nearly 50 years. Performers, including Bruce Springsteen, Phish, and O.A.R., have similarly allowed their fans to freely record their concerts.

Nike

Nike's purpose is to make people healthy and help them perform at their athletic best. Creating athletic gear is one way to make that happen. But Nike creates a fellowship with their customers. By creating technology, including apps and online tools, amateur athletes can track and compare their performance to the professional athletes they aspire to be and motivate them to reach their goals.

CrossFit

CrossFit gyms around the world build tight-knit communities through group workouts and support networks.

Harley-Davidson

Harley Davidson Owners Group (HOG) brings together Harley-Davidson motorcycle owners, promoting a sense of camaraderie and shared experiences.

The Moth

The Moth hosts live storytelling events where individuals share personal narratives, building a community around storytelling and human experiences.

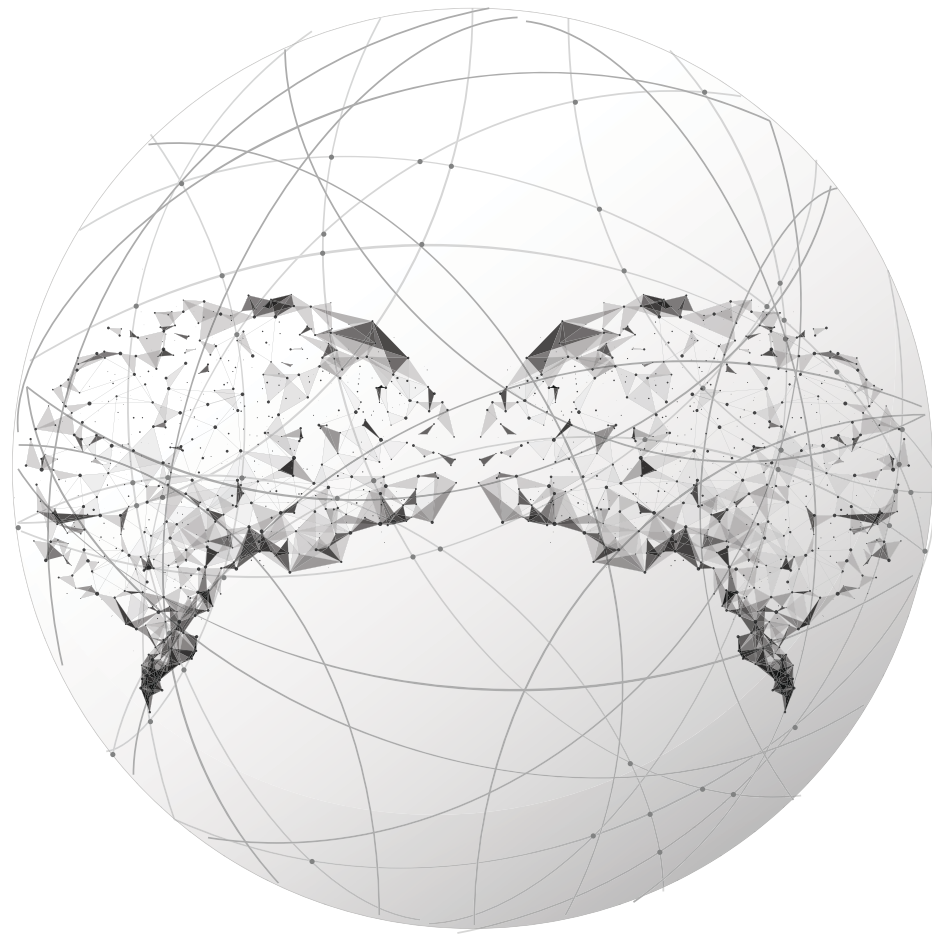
World of Warcraft

World of Warcraft Guilds: Within the virtual world of World of Warcraft, guilds provide a sense of belonging and community for players.

FELLOWSHIP ASSESSMENT

1. Who are the primary individuals or groups that resonate with and support your client's purpose?
2. What strategies does your client employ to foster and sustain these critical relationships?
3. How does your client collaborate with its network to propel the collective purpose forward?
4. In what ways does your client engage others in shaping and evolving their purpose?
5. What structures are in place to ensure alignment and collective momentum within your client's network towards their purpose?
6. How does your client address and reconcile differences in vision or approach within its network?
7. What role does your client's fellowship network play in their significant achievements and milestones?
8. How does your client recognize and celebrate the network's contributions towards achieving their purpose?
9. How does your client contribute to the growth and advancement of its network members?
10. What steps does your client take to broaden their network with entities that align with their purpose?

COMMITMENT



Commitment to one's purpose reflects deep dedication and unwavering perseverance, characterized by actively channeling resources, time, and energy towards achieving goals. Far from being passive, commitment is a dynamic force driving the transformation of vision into reality through strategic effort, sacrifice, and resilience.

This solid commitment is crucial for maintaining momentum amidst challenges, fueled by a strong belief in the feasibility and importance of one's goals. More than just aspiring to lofty goals, commitment means embracing the hard work, enduring sacrifices, and keeping a focused eye on the prize, ensuring each step forward is purposeful.

Such commitment not only advances one's objectives but also establishes a legacy of meaningful achievements aligned with personal values and aspirations.

COMMITMENT EXAMPLES

Prudential Insurance

For more than 140 years, Prudential Insurance has called Newark, New Jersey home. Despite all the city's storied political and economic travails, Prudential never gave up on it. But Prudential didn't just keep its headquarters in Newark; it actively invested in it. And every time the bottom dropped out on the city, it worked to rebuild it. In 1976, when Newark was at its lowest point, it launched a multi-billion-dollar program to work with public, private, and non-profit partners to promote economic and social mobility for underserved populations, concentrating on housing, health, energy, and jobs.

Costco's Fair Wages

Costco is known for paying its employees significantly higher wages than the industry average. The company believes in providing fair compensation and benefits, even in the face of pressure to cut costs.

Chick-fil-A's Sunday Closure

Chick-fil-A closes its doors every Sunday, a decision rooted in the founder's Christian beliefs. This practice demonstrates a commitment to religious values, even at the potential expense of profits.

Microsoft's Accessibility Initiatives

Microsoft invests heavily in accessibility features for its products, ensuring that people with disabilities have equal access to technology.

Zappos' Employee-Centric Culture

Zappos is known for its employee-centric culture, prioritizing employee well-being and happiness, even in a competitive retail industry.

H-E-B's Disaster Relief Efforts

H-E-B, a Texas-based grocery chain, is known for its rapid response to natural disasters, providing aid and resources to affected communities.

St. Jude Children's Research Hospital's No Patient Turned Away Policy

St. Jude provides treatment to children with catastrophic diseases, regardless of a family's ability to pay. This commitment ensures that every child receives the care they need.

FELLOWSHIP ASSESSMENT

1. What specific resources has your client allocated towards realizing their purpose?
2. How does your client ensure that their efforts and investments are aligned with their central purpose?
3. Could you provide an example of how your client has surmounted a significant obstacle in their pursuit of purpose?
4. What mechanisms does your client have in place to maintain focus and drive towards their purpose, especially under adverse conditions?
5. What significant sacrifices has your client made to remain aligned with their purpose?

6. How does your client track and evaluate their progress in achieving their purpose?
7. What contingency strategies does your client have for potential challenges or detours in their purpose-driven endeavors?
8. How does your client balance immediate operational demands with their long-term purpose-driven goals?
9. In what ways does your client periodically review and adjust their commitment to their purpose?
10. How does your client ensure that their daily actions consistently reflect a strong commitment to their purpose?

Worksheet Part III - A

Self-Evaluation on Stakeholder Engagement

This part of the worksheet is designed to help users evaluate both their stakeholders' and their own intention, fellowship, and commitment to a purpose. By answering these questions, users can gain insights into how well-aligned they are with their stakeholders and identify areas for improved engagement.

Intention

1. Stated Goals: What are the explicitly stated goals or missions of the stakeholder?
2. Decision-Making: How do the stakeholder's decisions and actions reflect their underlying intentions?
3. Consistency: Are there patterns in the stakeholder's behavior that reveal their true intentions?

Fellowship

1. Community Engagement: How does the stakeholder engage with their community or audience?
2. Brand Loyalty: What strategies does the stakeholder employ to build loyalty among their audience or customers?
3. Shared Experience: Are there initiatives or programs that the stakeholder uses to create a shared experience?

Commitment

1. Long-Term Initiatives: What long-term initiatives has the stakeholder undertaken that demonstrate their commitment to their goals?
2. Resource Allocation: How does the stakeholder allocate resources (time, money, personnel) towards their purpose?
3. Adherence in Adversity: How does the stakeholder maintain their purpose in the face of challenges or adversity?

Worksheet Part III - B

Determining Personal Intention, Fellowship, and Commitment

Intention

1. Personal Mission: What is your personal mission or primary goal in your professional or personal life?
2. Actions Reflecting Intentions: Can you identify specific actions you've taken that align with your intentions?
3. Consistency in Intentions: How consistently do your actions and decisions reflect your stated intentions?

Fellowship

1. Building Community: What steps do you take to build a sense of community around your goals or interests?
2. Engaging Others: How do you engage others in your initiatives or causes?
3. Creating Shared Experiences: What strategies do you use to create shared experiences that foster fellowship?

Commitment

1. Dedication to Goals: How do you demonstrate your dedication to your long-term goals or mission?
2. Overcoming Obstacles: How have you persevered in your commitment in the face of obstacles?
3. Resource Dedication: How have you allocated your resources (time, energy, finances) to uphold your commitment?

Reflection:

- Alignment and Discrepancies: Reflect on the alignment or discrepancies between your and your stakeholders' intention, fellowship, and commitment.
- Improvement Strategies: Based on your assessment, identify strategies to better align your actions with your intentions and to strengthen your fellowship and commitment.

WORKSHEETS

RELATIONSHIP STRATEGY

1. List 20 of your key relationships (internal to your organization or external):

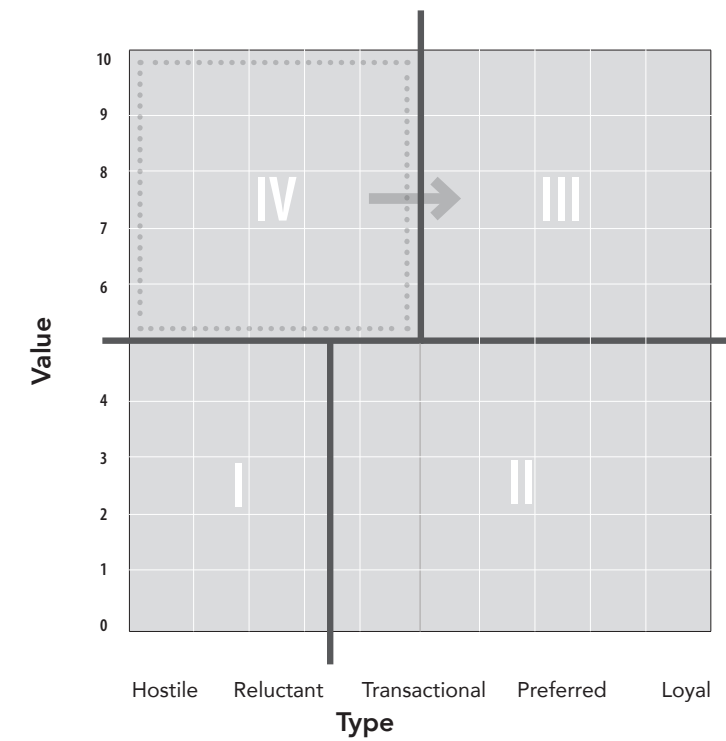
	Name	Value	Type
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
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16.	_____	_____	_____
17.	_____	_____	_____
18.	_____	_____	_____
19.	_____	_____	_____
20.	_____	_____	_____

Value: On a scale of 1-10, assess the current or future value of the relationship. The value is obviously subjective and can be based on a wide set of criteria—from economic to political to social. The key to scoring the value of the relationship is determining how critical it is to you achieving your goals and objectives.

Type: Indicate the current status of the relationship by the following types:

- (H) Hostile - Antagonistic, anxious to sever the relationship.
- (R) Reluctant - Hesitant. Wary and/or suspicious of any engagement.
- (T) Transactional - Limited to a simple reciprocal exchanges.
- (P) Preferred - First choice. Desired over all available options.
- (L) Loyal - Indispensable. Unbending. Forgiving. Lasting. Exclusive.

2. Using the number that corresponds to the name, plot each of relationships on the Value | Relationship Grid below. The Relationship Type plotted in the X direction. The Value (1-10) is plotted on the Y axis.



Quadrant I

These relationships offer little value AND they don't like you! Get rid of them as soon as you are able.

Quadrant II

These relationships like you well enough, but don't offer you much value. Be judicious in how much time and resources you spend fostering the relationship.

Quadrant III

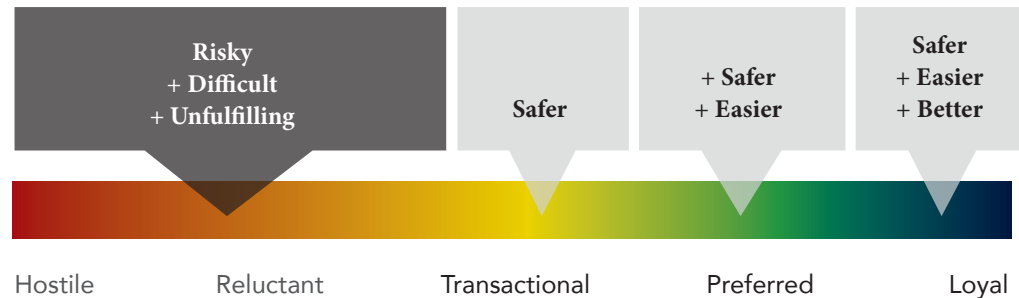
These are your best and most valuable relationships. Continue to care for them in the manner you have, but understand that they are a finite resource. If QIII relations receive all your attention you will never grow.

Quadrant IV

These are the relationships that require a plan. They offer a lot of value, but don't see you as irreplaceable. They can leave in an instant and never look back. Use this book and the following worksheets to develop a plan for them.

RELATIONSHIP SPECTRUM

The Relationship Types described on the previous pages are broad categories of the different kinds of relationships we develop throughout our lifetime. They each fall somewhere on a spectrum from bad to good—from hostile to loyal or from hate to love—with plenty of iterations in between.



Transactional = Safer

Our daily interactions usually sit in the middle of the trust spectrum, being transactional and often yielding the results we expect. These encounters, though varied in nature, evoke neutral emotions in us; we neither deeply like nor dislike the individuals involved. Our interactions are polite and confined to the context of these specific situations, reflecting a mutual sense of security.

This mindset can be sobering, reflecting how we, as humans, have come to take trust for granted in our interactions. Unlike many animals that approach others with inherent suspicion, we have evolved to default to trust in our social groups. This inherent trust is crucial for cooperation, a cornerstone of human success. We expect trustworthiness from others as a norm, only shifting to distrust when given a reason. As a result, being trustworthy doesn't often garner special recognition or credit, as it's already an expected baseline in our social fabric. This taken-for-granted trust is what allows our complex social structures to function smoothly.

Despite this default to trust, earning and maintaining it isn't always easy or permanent. We expect people to demonstrate character, expertise, dependability, and competence. If our brains detect a scarcity of these essential traits, the relationship shifts towards the left of the trust spectrum.

Preferred = Safer + Easier

Transforming a transactional relationship into a more meaningful one involves more than just establishing trust and security; it also requires making the other person's life easier. When evaluating your current relationships, consider the challenges and obstacles the other party faces, whether in their professional or personal lives, or even in their interactions with you.

For instance, consider the experience with an online retailer. It's basic to expect secure transactions, timely delivery, and accurate pricing. But when the retailer adds features like wish lists, saved shipping addresses, or product recommendations, they're simplifying your experience. These conveniences eliminate the need to remember details or repeatedly input information. This principle isn't limited to online shopping; it applies to individual and organizational interactions as well.

Helping someone goes beyond fulfilling their explicit requests. It's about the unexpected ways you can contribute to their lives, not just completing paid tasks. Creating a sense of belonging involves showing an interest in improving their overall life experience, not just focusing on the specific services or functions you're compensated for.

Scenario	Safer	Easier
Financial adviser	Calling the client with opportunities or dangers.	Create online portal where clients can check the status of their investments 24/7.
Kitchen Contractor	Getting a kitchen project finished as quickly as possible and cleaning up afterward.	Give clients vouchers for dining out during construction.
Fortune 500 Company	Provide employees with competitive wages, opportunity for career growth and development.	Offer dry cleaning services, on-site day care, and flexible, work-at-home opportunities.
Brick and mortar retailer	Available on-site inventory with a wide variety of products, styles and sizes, along with changing rooms to try on before purchase.	Provide packaging and shipping services for Amazon (your competitor) to make returns easier for your customers. Save them time.
Attorney	Provide business with quality legal services that protect them from potential liabilities.	Develop & host regular events for your clients and prospects with (non-legal) programs that can help their businesses succeed.

GOALS

To evolve and to adapt is to change. In nature, change is random and aimless, having no preordained “desire” or outcome. Selection occurs naturally.

While not exempt from natural selection, humans have used their rational brains to hijack the process. Our species has utilized our remarkable minds to cure diseases, produce our own foods, generate energy, transform our environment, and even manipulate our genetic codes. We have found ways to outsmart the evolutionary process and take control of our destiny.

My goal for this workbook was to have you do the same with your organization and careers. I want you to have the information and tools that will allow you to take control of your destiny and develop the relationships you will need to succeed. I have shared the scientific evidence supporting this workbook’s premise, stories, and anecdotes that offer proof of concept and questions to consider when considering the most critical relationships in your life. Now, it’s time to put what you have learned into action. It’s time to create your plan utilizing the one strategy that has effectively guided every life form that has ever existed on this planet. Creating unbreakable bonds. Fusing permanent connections. Establishing unified networks. Building loyalty by making the lives of others **Safer**, **Easier**, and **Better**.

Safer

When it comes to making someone’s life safer by building trust, the focus is on you. You offer safety when you match your character, competency, consistency, and capacity to someone else’s standards for each element. It’s your responsibility to gauge and then meet or exceed their expectations. It’s up to you to change your skills, training, expertise, etc., to provide what your people need to see and believe before they can trust you.

Think about whether you live up to other people’s expectations. Don’t assume that you know what those are. You have to be observant. You have to make the ask. Safety and trust are about alignment. You can’t do that if you only measure your trustworthiness by your own standards.

Easier

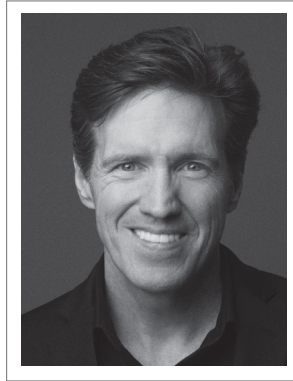
Easing someone’s burden and fostering belonging revolves around understanding their true self, needs, and concerns. This goes beyond surface-level connections; it requires proving your comprehension of their identity and priorities. How? By recognizing them personally, noting their shared details, and actively seeking to know them better.

A practical approach is creating a detailed profile of key relationships, encompassing both their interests and deeper fears and ambitions. This insight can come from direct conversations and observing broader industry contexts. By identifying potential challenges and offering proactive support, you demonstrate your value. Showing common ground or embodying traits they admire provides them a sense of safe belonging.

Better

In the realm of nature, change is a constant, driven by random mutations and the impersonal force of natural selection. Yet, humans have uniquely harnessed our intellect to direct this flow of change, bending the arc of evolution to our will. From curing diseases to reshaping our environment, we’ve demonstrated an unparalleled ability to define our destiny.

Applying this transformative power to your organization and career involves more than just adapting; it’s about evolving with intentionality. “Better” in this context means enhancing the collective well-being by aligning with a purpose that transcends individual ambitions. It’s about creating a legacy that enriches both your life and those around you.



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