

# CLARITY

The Strategic Blueprint  
for Small Business Success



# Welcome! This is a Journey of Discovery, Strategy, Action Planning and Results

“The best way out is always through.”

— **Robert Frost**



# Cliff Jones

Clarity Strategic  
Advisors, LLC



- Family man, lived in Arizona since 1986. Both sons went to state universities.
- Founder, managing partner of Clarity Strategic Advisors, LLC
- 3rd generation entrepreneur, successful founder of two businesses now sold.
- Author and contributor to five non-fiction books including Radical Clarity for Business - How to Empower People for Better Results at Work.



# Who is the Blueprint Designed to Help?

Motivated, disciplined **business owners**, executives, managers, employees, contractors, and stakeholders.



# How Do You Define Success?

The most important key to success is that you become what you think. What you think about leads to either success, failure, or somewhere in between. You get to choose.

Success is really about knowing what you want. To understand what you want, you need to be realistic about your skills and resources. Set clear goals with realistic timelines and a plan of action to get there.

# Strategic Planning is Not an Event

Great strategic planning is an ongoing, simple PROCESS you will implement with regular frequency.



# How Clarity Works

1. Assess your business Clarity Score.
2. Conduct deep discovery with your team.
3. Plan your core action steps.
4. Implement the plan and measure results.
5. Never stop learning and adapting.



# PRO TIP!

## Work Often “On” Business

Strategic planning is working “on” your business. If you’re working “in” your business and ignoring strategic opportunities, you might be missing the boat.





# STEP 1: Know Your Clarity Score

1. I am clear about the company's goals and expected results:
2. I am clear on the company's mission statement and can easily remember it:
3. I am clear on our company's vision statement and find it inspiring:
4. I am clear on our company's purpose statement and feel it aligns with me as a person:
5. I am clear about the company's core values, and I committed to them as a person:
6. I am clear about our company's strengths, weaknesses, opportunities, and threats (SWOT):
7. I am clear about our company brand, and how we market, sell, and take the best care of customers:
8. I am clear about my commitments and am accountable to the team:
9. I am clear about the company's measures of success, or Key Performance Indicators:
10. I trust the people in our business:
- 11. Total Clarity for Business Score:**



# PRO TIP!

## Bridge Gaps in Clarity

Strategic alignment is your key to success. Communicate clearly to close the gaps in your strategic clarity.



# STEP #2: Discovery – Invite Your Team

Building an organization is a team sport. It's essential to include a diverse team including relevant, trusted advisors and contractors. **Designate a scribe** of your new Clarity Strategic Action Plan and blueprint.



# PRO TIP!

## Keys to Discovery Success

One of the keys to your success with discovery is listening to what people say. If they are great contributors, contractors, stakeholders, leaders, managers, and staff, include them and hold them accountable for their words and actions.



# 16 Crucial Discovery Questions

1. What is our primary 12-month goal?
2. What is the problem, challenge, or market need we meet?
3. What are our the solution and unique value we offer?



# Discovery Continued

4. Who is our ideal client or customer?
5. What is our mission? (It's what we do.)
6. What is our purpose (why)?



# Discovery Continued

7. What is our vision over the next three to five years?
8. What are our core values that we keep as commitments?
9. What are our strengths, weaknesses, opportunities, and threats?



# Discovery Continued

10. Who are our key people, and what are their roles?
11. What is the personality, vibe, or essence of your brand?
12. What are the best ways for us to go to market?





# Discovery Continued

13. What is our sales and customer service process?
14. What are our key systems, tools, and processes?
15. What are our key operational processes we need to improve and why?



# Discovery Continued

16. How do we measure results? This is your opportunity to review financial results including Income Statement and Balance Sheet. It's also important to review other key metrics.



# STEP #3: Draft Your Strategic Plan

“A goal without a plan is just a wish.”  
— **Antoine de Saint-Exupéry**



# Goal – 12 Months

- Write the primary goal as an organization for the next 12 months.
- Typically, business goals focus on action steps that increase revenue, reduce costs, and improve operational efficiencies and bottom-line results.
- Focus on one primary goal and critical milestones.



# Problem / Need

- Write the primary problem you solve for customers.
- For example, if you work in a restaurant, your problem is hunger. If you sell cars, people need transportation.



# Solution

- Write the solution you provide to customers.
- When you focus on providing solutions, you add value.



# Ideal Client / Customer

- Define your ideal customer or client regarding who they are, where they work or live, and how to convey your value to them.
- If you have more than one, detail them all.



# Mission Statement

- Now that you and your team have discussed your mission, it's time to write your mission statement.
- Use a short phrase that's easy to remember when someone asks you, "What do you do?"





# PRO TIP!

## Mission Statement Examples

- “Clarity empowers your people to succeed.” - Clarity Strategic Advisors, LLC
- “To connect the world’s professionals to make them more productive and successful.” - LinkedIn
- “To build the Web’s most convenient, secure, cost-effective payment solution.” - PayPal
- “To be a company that inspires and fulfills your curiosity.” - Sony



# Purpose Statement

- Sometimes your mission statement and purpose statement can be combined.
- For now, write a purpose statement that defines your “why.”
- Your purpose invites people to understand your motivation, perhaps a cause, and will do business with you.



# PRO TIP!

## Choose Your Purpose Words

Humorist Deep Thinker Explorer Talker Agent of Change	Get Sh*t Done Person Empowerer Trust Builder Teacher Nurse	Mother Numbers Person Project Manager Handyman Farmer	Translator Builder Composer Songwriter Driver Minister or Saint	Artist Organizer Influencer Fact Finder Sales Pro	Turnaround Expert Writer and Storyteller Happy Problem Solver
Deal Maker Visionary Start-up King Doctor Trust Builder	Empowers Others Processor Strategic Influencer Facilitator Explorer	Puzzle Pro Statistician Librarian Empowerer Inspiration	Mediator Investigator Communications and Marketing Challenger	Community Leader Designer Steady Eddie Big Picture	The High Performer A Gentleman Group Leader The Connector



# Vision Statement

- Write your vision statement.
- This short phrase describes what it looks, feels, and sounds like when you've achieved your mission.
- Make your vision inspiring to all.



# PRO TIP!

## Vision Statement Examples

- “Bring inspiration and innovation to every athlete\* in the world. (\*If you have a body, you are an athlete.)” – Nike
- “Our vision is to create a better every-day life for many people.” – IKEA
- "Our vision is to be earth’s most customer-centric company; to build a place where people can come to find and discover anything they might want to buy online." - Amazon.com



# Core Values – Commitments

- Write a list of the core values you espouse.
- The key is working with people who share your core values, and you can easily convey them to your customers.



# S.W.O.T. Analysis

- Write your S.W.O.T. Analysis.
- This exercise is about creating a heightened awareness of what fosters better results.
- **Strengths, Weaknesses, Opportunities, Threats**



# Unique Value & Competitive Advantage

- Write your competitive advantage.
- Be prepared to answer the question, “Why you instead of the organization we use now, or competitors?”
- That’s your unique value.





# Pillar of Profit #1: Human Capital

- List the people involved in driving results.
- Include Independent Contractors if you pay them. List their name, title, and key responsibilities.
- You're seeking the right people to do the job the first time, on time, every time.
- Feel free to use an Organizational Chart if you have one.



# Pillar of Profit #2: Brand / GTM

- Write the core elements of your brand and your overall approach to going to market.
- If you require a detailed marketing plan, it will complement your strategic plan and integrate many of the same elements.



# PRO TIP!

## Brand Power Matters

1. Why are you in business?
2. How do you describe your brand identity or personality? (Keywords)
3. How do you describe the voice of your brand?
4. Which famous people might love your brand and why?
5. How do you describe the benefits of your brand?
6. How do you describe the essence of your brand?
7. What, if anything, works against your brand? (Reputation, competition, etc.?)
8. Why should your team and clients believe in your brand?
9. Why do clients or customers do business with you?
10. What does your brand really “stand” for, if you had to pick one word?



# Pillar of Profit #3: Sales / Cust Svc

- Write the core elements of your sales and customer service approach.
- Define your sales process, systems, and accountabilities through management and coaching.



# Pillar of Profit #4: Operations

- Write the core elements of your operations at the department level.
- Define your operational procedures, manuals, and training solutions.



# Pillar of Profit #5: Financial Results

- Evaluate your financial results by solid command of your Income Statement and Balance Sheet.
- Focus on Gross Revenue, Gross Expenses, and Profit or Loss.



# Resources Needed

- Write a list of resources needed by each department.
- What's missing?
- What's not working?
- What is most essential to reach your next goal and achieve the vision?



# STEP 4: Plan Your Action Steps

“What one does is what counts. Not what one had the intention of doing.”

— **Pablo Picasso**





# PRO TIP!

## Everyone is Accountable

Create a culture of accountability. Champions, winners, and great leaders are **accountable** to themselves and the team.  
Hire the best. Ditch the rest.



# The Pillars of Profit

1. People
2. Brand & Go-to-Market Plan
3. Sales and Customer Service
4. Operations and Fulfillment
5. Finances - Top and Bottom-Line Results

# PRO TIP!

# Invest in Your People

If you don't invest in recruiting, onboarding, training, and coaching your employees well, your competition will.



# The Benefits of Clarity

- Your entire team has CONFIDENCE.
- You set GOALS with intention.
- Everyone shares the same VISION.
- Your MISSION is powered by purpose.
- CORE VALUES are stated as commitments.
- You know your S.W.O.T. - You're aware.
- Your BRAND and culture is strong.
- You KNOW your customers.
- You can best meet their NEEDS.
- Your SOLUTION provides value.
- You COMMAND pricing power.
- You MEASURE what counts.
- You take ACTION with clarity.
- You get RESULTS.



# Thank You

For more information about strategic planning, finding capital,  
and improving results, contact me at [www.CliffordJones.com](http://www.CliffordJones.com).



**Cliff Jones, Founder**

Clarity Strategic Advisors, LLC