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The Keys to your business success await you with
FREE checklists, templates, scripts, programs and more!

Business Success
GiveAway

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11 - 30

BusinessSuccessGiveaway.com

Hosted by Cindy J
The Visibility Wiz

The banner features a hand holding a golden key on the left, a circular portrait of a woman on the right, and a blue background with white and yellow text.

There are lots of great gifts and I'm honored that you chose mine to help your business!

After you finish, drop me a line and let me know what insights you gleaned from going through the checklist. I'd love to hear from you! Yes@JodyInspires.com



Jody Owen

ALIGNMENT MODEL CHECKLIST

BY JODY OWEN



The ultimate checklist
to help you align the
HEART AND SOUL of
your business, and
express it through
your offerings and
culture!

HEART AND SOUL ALIGNMENT MODEL™ CHECKLIST

This Alignment Model™ Checklist is designed to get a big picture view of the company you are growing. Refer to it any time you pivot, morph and do your planning sessions around your services, teams or marketing strategies.

The benefit of having everything aligned is that things run more smoothly, with more ease, grace and clarity and everyone is feeling powerful, valued and fulfilled in contributing to the business. It's like gears that fit perfectly together, or that feeling when you're in your zone.

It starts with your:

- Values
- Mission
- Vision
- Culture
- “Why”



You could call these the heart and soul of your business and are the starting point for your Business Charter and the Alignment Model™.

Your Business Charter is the guiding document that sets the foundation for your business, flexes with your growth, and is one of the most important documents you can have in your business. The Alignment Model™ makes sure that your business stays in alignment with the heart of the business.

When things are unclear or out of alignment with the heart and soul of your business, (NO MATTER WHAT SIZE BUSINESS YOU ARE), then things will be *hard, draining, efforting, stressful, messy* and you will see it in lack of clients and your bottom line.

And you, or your team, won't want to get out of bed in the morning to do it all over again!

So, when you start to experience those things, they are probably an indicator that you are either out of alignment or at a real growth point. Whoo hoo! AFGO! (Another F'ing Growth Opportunity!)



First, we start with your Values. On the next page is a list of "value" words for you to choose from, or you may come up with your own. Circle everything that resonates with you and we will narrow it down from there. So STOP, and do that now.

Now, narrow it down to the **top 10**. Finally choose the **top 5** that you can't live without and most represent you and the business you are building.

The top 5 values of my business

1. _____
2. _____
3. _____
4. _____
5. _____



Now define what each of those values means

For example - Integrity: Doing the right thing, even when no one is watching

1. _____ : _____

2. _____ : _____

3. _____ : _____

4. _____ : _____

5. _____ : _____



Values List

| | | | | |
|---------------------|---------------------|---------------|---------------------|-------------------|
| Acceptance | Creativity | Giving | Optimism | Serenity |
| Accessibility | Credibility | Global | Order | Service |
| Accountability | Curiosity | Goodness | Organization | Shared Prosperity |
| Accuracy | Customer Focus | Goodwill | Originality | Significance |
| Adaptability | Decisive | Gratitude | Outrageous | Silence |
| Adventure | Dedication | Greatness | Partnership | Simplicity |
| Agility | Delight | Growth | Passion | Sincerity |
| Altruism | Dependability | Guidance | Patience | Smart |
| Appreciation | Determination | Happiness | Peace | Speed |
| Approachable | Development | Harmony | People | Spirit |
| Attention to Detail | Different | Health | Perceptive | Spontaneous |
| Attentive | Dignity | Heart | Perseverance | Stability |
| Awareness | Diligence | Helpful | Personal Growth | Standardization |
| Balance | Discovery | Honesty | Philanthropy | Stewardship |
| Beauty | Discretion | Honor | Play | Strength |
| Belonging | Diversity | Hope | Positive | Structure |
| Bold | Down-to-Earth | Hospitality | Potential | Success |
| Bravery | Ease of Use | Humility | Powerful | Support |
| Brilliance | Education | Humor | Practical | Surprise |
| Calm | Efficiency | Hygiene | Precision | Sustainability |
| Capable | Elegance | Imagination | Prepared | Sympathy |
| Caring | Empathy | Impact | Privacy | Synergy |
| Challenge | Empower | Impartial | Proactive | Systemization |
| Change | Encouragement | Improvement | Productivity | Talent |
| Character | Energy | Independence | Professionalism | Teamwork |
| Charity | Engagement | Individuality | Profitability | Thankful |
| Cheerful | Enjoyment | Informal | Progress | Thorough |
| Clean | Enthusiasm | Innovation | Prosperity | Thoughtful |
| Clear | Entrepreneurship | Insight | Punctuality | Timely |
| Collaboration | Environment | Inspiration | Quality | Training |
| Comfort | Equality | Integrity | Recognition | Tranquility |
| Commitment | Ethical | Intelligence | Recreation | Transparency |
| Communication | Exceed Expectations | Intuition | Reflection | Trust |
| Community | Excellence | Inviting | Relationships | Truth |
| Compassion | Expertise | Joy | Relaxation | Understanding |
| Completion | Explore | Kindness | Reliability | Uniqueness |
| Composure | Fairness | Knowledge | Resilience | Unity |
| Confidence | Faith | Leadership | Resourceful | Universal |
| Confidential | Family | Learning | Respect | Useful |
| Connection | Fearless | Listening | Responsibility | Value |
| Consciousness | Fitness | Love | Responsiveness | Variety |
| Consistency | Flair | Mastery | Risk | Virtue |
| Continuous | Flexible | Maturity | Satisfaction | Vision |
| Improvement | Focus | Meticulous | Security | Warmth |
| Contribution | Foresight | Mindful | Self Awareness | Wealth |
| Cooperation | Freedom | Moderation | Self Motivation | Welcoming |
| Coordination | Friendly | Motivation | Self Responsibility | Wisdom |
| Courage | Fun | Mystery | Selfless | Wonder |
| Courtesy | Generosity | Neatness | Sense of Humor | |
| Craftsmanship | Genius | Openness | Sensitivity | |



Next we will look at the other pieces of the heart and soul of your business. You would have these in your Business Charter, but if you don't have one, just use your best guess and intuition to guide you through.

Note: This is just an exercise and there are NO right or wrong answers here, so take THAT pressure off yourself! As you continue to ponder them, they will become clearer, and may even change a bit. And that's ok because it's an indicator of personal and business growth!

What's the mission of my business? (what you are wanting to accomplish)

I / we are on a mission to: _____

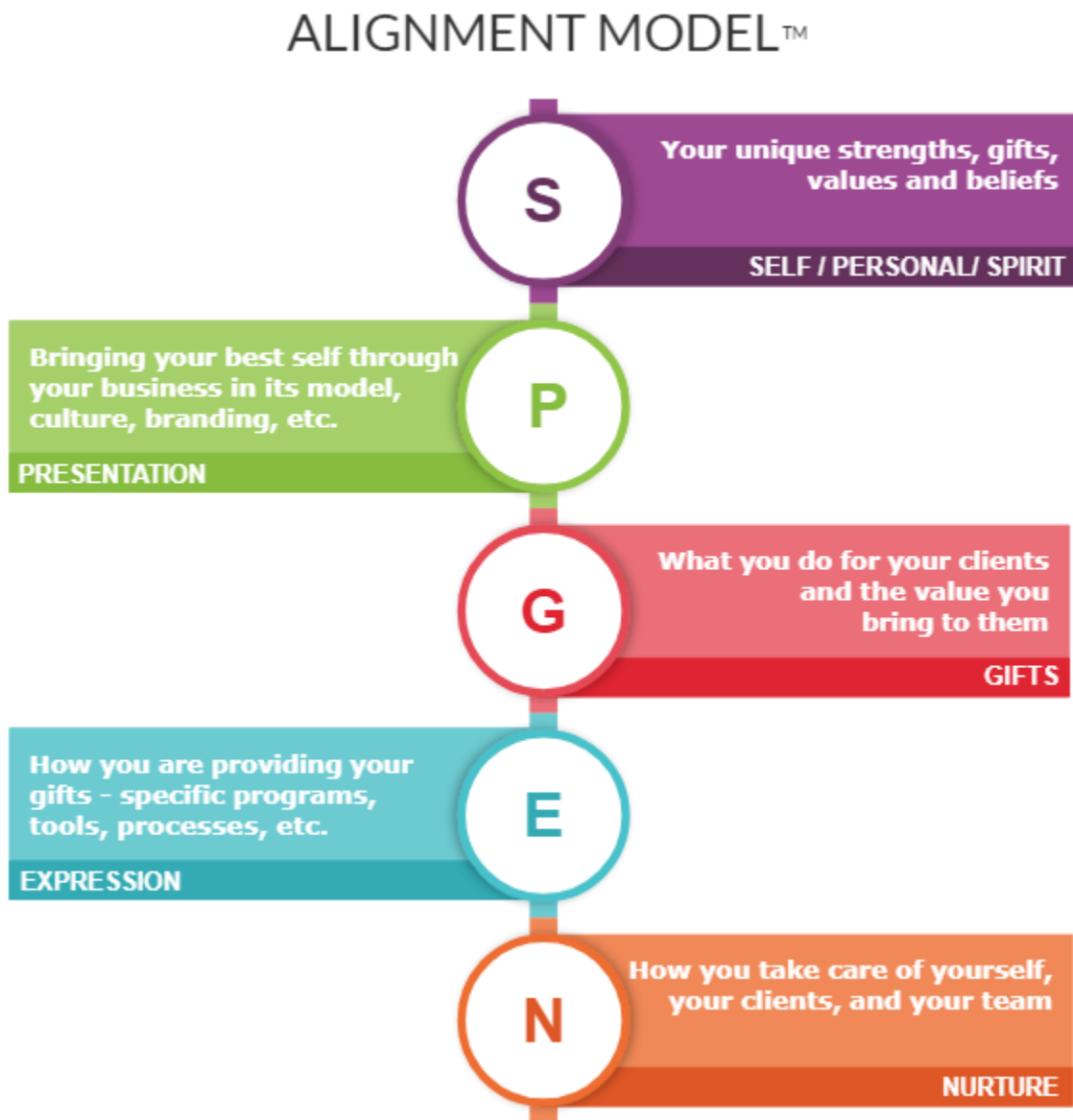
What's the vision of my business? (what it will look like when I accomplish my mission in the big picture)

My / our vision is: _____

What is the culture of the business? (talk about how you engage with each other and your clients)

Why am I / are we in this business? (besides to make money—what the driving desire is for you to do this business at this time)

Now on to the Alignment Model™. It has 5 parts:



Self • Presentation • Gifts • Expression • Nurture



Ready?! Let's dig in and start making sure that the areas of your business align with your Values, Mission, Vision, Culture and Why. Check the things that are true for you. *Notice the areas where you would like to say, "Yes, that's me!", but deep down know that you have some work to do in this area.*



Your ego-mind is a trickster. It will have you put on a mask that is not always authentic just to protect itself (you) and keep things the same and in its comfort zone. Because if it's the same, and even though it may not be totally comfortable, at least it knows what to expect, right?!

Don't give in to the trickster. Growth comes in the uncomfortable and in the truth. So, as you go through this, be totally honest with yourself. It is designed to show you the opportunities for growth for you and your business. As they say, two of the biggest self-

development opportunities are having kids and growing a business!

PERSONAL / SELF – your personal strengths, values and beliefs

- I am generally confident and don't question myself
- I am accepting of change
- I am powerful in dealing with my fears by myself
- I have developed a leadership mindset and usually see the big picture of my business instead of being a "technician" in my business
- I am engaged in personal growth activities on a regular basis
- I am clear about my uniqueness and the gifts I bring
- I am incorporating that uniqueness and those gifts in and through my business
- I can easily navigate my way out when I get stopped or stuck
- I never experience feelings of doubt, unworthiness, etc.

PRESENTATION – how you are bringing your best self through your business (people, culture, brand experience, etc.)

Internal

- I have a Business Charter (the heart and soul) including mission, vision, purpose, benefits, unique value statements, culture definition, branding experience, client emotions, etc.
- My business' "Why" is well defined (why I am in THIS business)
- My personal "Why" (why I am in this business) is clear
- My clients know about my why



Brand Experience - the whole experience of you and your company (traditional, hi-tech, environmental, etc.) As you will see, my brand experience is one of flow, calm, easy, simple, authentic, etc. It reflects my Business Charter and my personality. Define yours now.

My Brand Experience is:

- My brand experience is well defined
- Logos and style sheet are up to date and reflect my business as it is today
- Templates and documents reflect my brand experience and not just my logo
 - Contract / Proposals
 - Invoices
 - Newsletter templates
 - Product Order forms
 - Employee and Subcontractor Non-disclosure Agreements
 - Employee and Subcontractor Working Agreements
 - Client Status Update forms
- I have an on-boarding procedure for new clients that aligns with my brand experience



Team – everyone has some sort of team, whether it is just a coach, accountant, and an IT person, or you have full- or part-time employees or subcontractors. What is the culture you are creating for them and how can they best align with it?

The culture in my business is:

- The culture is well defined
- I have communicated my why and culture to my team members and they are aligned with it
- I have an on-boarding procedure for new team members/subcontractors that aligns with my culture
- My team is complete, and I have a roadmap with milestones for further growth
- Each team member functions beautifully as a part of the team
- My team members regularly make decisions and suggestions that are incorporated because they understand our business
- We are all held accountable and honor those that help us out of our comfort zone



GIFTS – what you are doing for your clients (what service you are providing, who you are serving and why you are the best fit for them) It's like the ingredients that are in a recipe.

- I have annual/quarterly goal and planning documents including offers, pricing, and money game goals
- I have a marketing calendar
- H. R. document package (if needed)
- I have a “parking lot” document or list for business ideas, offerings, etc. that I visit regularly



Niche - Understanding your niche is a big part of making sure that your offerings are serving your clients and meeting their wants, needs and desires.

My perfect niche is:

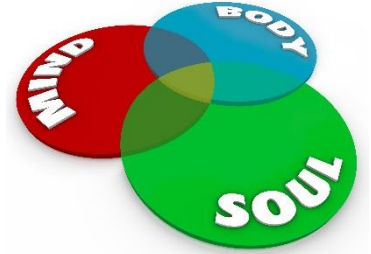
- My niche is well defined and are aligned with me and my business (as outlined in my Business Charter)
- My perfect niche knows me and regularly engages with me
- Others know my niche so they can refer me
- I have offerings defined that meet the needs and wants of my niche and that they would consider gifts to help them

EXPRESSION – how you are providing your gifts of service (what specific programs, tools, marketing techniques, etc. do you use to get your gifts into your clients' hands?) Like taking the ingredients and making something to eat!

- I have all the tools and knowledge I need to market my offerings, and regularly do so
- The way I market my business is in alignment with my culture and brand experience
- My project and client management systems work the way I do and are easy for me to use
- My website is aligned with my message, branding and culture, is easy to navigate and leads people through an easy path to engagement
- My pricing structure for my offerings is clear with benefits and outcomes well defined
- I have a steady and strong income stream every month
- I understand my client engagement funnel and regularly monitor it
- I am comfortable with talking about my offerings, their value, and stick to my pricing
- My offerings are easily delivered and are scalable
- I have the systems and procedures in place to fully support the development, marketing and delivery of my offerings
- I have the systems and procedures in place to fully support the ongoing nurturing of my niche and clients



NURTURE – how you take care of yourself, your clients and your team. Building your business is not going to be “comfortable”. The challenge is to become comfortable being uncomfortable, and will require nurturing of yourself, your Self (spiritual part of you), your team and your clients.



- I like my current clients (if you don't then “consciously uncouple” them ASAP because they aren't aligned with your business!)
- I regularly keep in touch with my existing clients and make sure they are getting the fullest and best experience possible
- I regularly keep in touch with my past clients (presuming they are in alignment with the way your business is today), and make sure they are getting the fullest and best experience possible
- I follow up with after networking events with those that are in my perfect niche
- I regularly provide opportunities for personal and professional development for myself and my team
- My work space is clean, organized, inspiring, functions well, and is in alignment with my Business Charter, culture and branding experience
- My physical files and documents are organized, purged, up-to-date and organized
- My electronic files and emails are organized, purged, up-to-date and organized
- My accounting is up-to-date, and I regularly check to see the state of my business, make sure I'm on track with money game goals, can make educated decisions about next steps, and celebrate that with my team
- I pay myself just as I would pay my team members
- We regularly have internal meetings to communicate the most important things about the business, find and address our gaps, and to build trust and integrity
- I/we regularly maintain our files, systems, plans, culture and our bodies
- My team and I celebrate and value each other

Now that you've finished the checklist, where do you want or need to up-level yourself or your business?



WHAT'S NEXT?

- Make an appointment with yourself - RIGHT NOW** - to revisit it in the near future, and on a regular basis. Every 6 months is good for the first few years, and then annually as you grow.
- Take steps to align your business** so you can enjoy the flow, freedom and in your business we all long for. There's no reason to spend one more day fighting against your business instead of being aligned with it! Except, maybe, if you like that sort of thing...
- Connect with me on [Facebook](#) and [Instagram](#)** so you can continue to be inspired to find new ways to enhance your alignment of **Values, Mission, Vision Culture and Why**

ACCEPT MY INVITATION TO A COMPLIMENTARY ALIGNMENT SESSION where we can flush out the next best baby steps for you to get started in your alignment strategy.

1. It will only take about 30 minutes
2. We will see where the most pressing areas are to start
3. You will come away with steps that are **aligned with you and the way YOU work!**

[Click here to Reserve Your Spot Now!](https://calendly.com/jodyowen/30min)

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Empowering You • Aligning Your Business

