STEP BY STEP GUIDE TO WRITING YOUR OWN BRAND STORY!

DIGI REVIVAL
CREATIVE AGENCY

BUSINESS ESSENTIALS WORKBOOK

Learn to communicate your brand's purpose, mission, vision, goals, and values in one simple workbook.

DIGIREVIVAL CREATIVE AGENCY

BUSINESS ESSENTIALS WORKBOOK

Define your business' purpose, vision, mission, & goals

Defining what your business does, how it plans to make its impact, and the goals that will help you pursue your mission and vision can help bring clarity to your business's marketing and operations. Whether you're a new business owner or a seasoned veteran - establishing these essentials is crucial to moving your business forward with the most potential.

STEP 1: DEFINE YOUR WHY

What is a why statement? To put it simply, a why statement (otherwise known as your company purpose) is the purpose, the cause, or the belief that drives every organization and every person's individual career. Initially introduced by Simon Sinek in his book, "Start With Why: How Great Leaders Inspire Everyone to Take Action".

Before we can start defining your why statement, you'll need to ask yourself (and your business partner, if you have one) a few questions. Remember, your why is the emotional core of your decision-making, so it's important to really put some time into developing it.

- What do we do?
- For whom do we do it?
- Why do we serve our clients in the way that we do?
- Why are we in this industry?
- Why did we start this business?
- What image of our business do we want to convey?

Once you've answered these questions and you have a general idea of what your why statement might be, start drafting! You won't automatically write down the perfect why statement on the first try, but keep refining until you settle on a 1-2 sentence purpose. The first blank below represents the contribution you make to the lives others through your why, and the second blank is for how that contribution makes an impact.

To _____ , so that _____

TIP: Use a scratch sheet of paper to write several drafts of your why statement. Then ask friends, family, coworkers, or anyone who knows your business and can give you some feedback. Remember - your why statement shouldn't be a paragraph. Try to use 1-2 sentences in your final version.

CRAFTING YOUR MISSION & VISION

Crafting your mission and vision statements are part of the essential aspects in crafting your brand story and should have an impact on everything you do - now and in the long-term. Ready to get started? Take the answers to the questions you answered on the last page and your why statement, then use them to help develop the remainder of your mission and vision statements.

STEP 2: ESTABLISH YOUR MISSION

Developing a mission statement is not only helpful for your customers, but it's also helpful for your employees and coworkers. Instead of setting your mission statement and forgetting about it, you'll actually reference it pretty regularly when you need to make decisions that will impact your day to day operations.

But what is a mission statement? It is a brief statement of why an organization exists, what its overall goal is, what kind of product or service it provides, its primary customers or market, and its geographical region of operation. While that may seem like a lot, you can easily narrow down your mission statement to a sentence or two by asking these questions:

- What do we do?
- Whom do we do it for?
- How do we do it?
- What value are we bringing?

As an entrepreneur or small business, your company's mission statement should be concise and specific so your customers understand your purpose and how you provide value to them. Once you've answered the questions above, start drafting a few mission statements on your own. Try to refrain from using a vague, overly short mission statement (often like the larger enterprises do). If you can't differentiate your mission statement from a competitors, that's an important sign to craft something more specific.

Go ahead and start crafting your mission statement now:

CRAFTING YOUR MISSION & VISION STATEMENTS (CONTINUED)

STEP 3: CREATE YOUR VISION

Similar to a mission statement, a vision statement provides a concrete way for stakeholders, especially employees, to understand the meaning and purpose of your business. However, unlike a mission statement – which describes the who, what and why of your business – a vision statement describes the desired long-term results of your company's efforts.

Ready to create yours? It doesn't have to mean reinventing the wheel. In fact, all the things you've created up to this point can help you craft your vision statement, such as your mission, purpose, goals, and values. If you need a starting off point, ask yourself the questions below before drafting your first vision statements.

- What ultimate impact do I want my brand to have on my community, my industry or the world?
- What will the culture of my business look like, and how will that play out in employees' lives?
- In what way will my brand ultimately interact with customers and clients?

Once you've asked yourself these questions and answered them as completely as you can, then start crafting! Your vision statement doesn't have to be a specific length, but it shouldn't run on so much that it loses its vision. Think where you want to be and define the time it will take you to get there. While there isn't a set template for how your vision statement should be laid out, you can reference your competitor's vision statements and other statements to give yourself an idea of where to start.

Need examples? Heres a few to help you get started:

- **Avon**: To be the company that best understands and satisfies the product, service and self-fulfillment needs of women—globally.
- **Microsoft:** Empower every person and every organization on the planet to achieve more.
- **Walmart:** To give customers a wide assortment of their favorite products, Every Day Low Prices, guaranteed satisfaction, friendly service, convenient hours (24 hours, 7 days a week) and a great online shopping experience.

CREATE SMART GOALS TO HELP DRIVE YOUR BUSINESS

WHAT ARE SMART GOALS?

SMART goals are a tool to create criteria to help improve the chances of succeeding in accomplishing a goal (and they can be used as weekly, monthly, quarterly or other time limited goals to help you consistently push towards your long term vision). So before we jump into identifying your goals, let's elaborate on what SMART goals mean.

(S) SPECIFIC: When setting a goal, be specific about what you want to accomplish. Try answering the popular W questions like Who, What, When, Where, & Why to more accurately pinpoint the end result you want to achieve.

(M) MEASURED: How do you plan on measuring your progress towards your goal? Try to set a specific number, metric, or milestone.

(A) ACHIEVABLE: This focuses on how important and attainable a goal is to you. Do you have the right tools to achieve it? If not what will it take?

(R) RELEVANT: Is your goal directly linked to your long term business goals? For example, you wouldn't set a goal that related to consumers if your primary market is other businesses. Make sure every goals relates to your end goals.

(T) TIME BOUND: Setting a deadline for your goals can help keep you on track. If you create a goal that will take three months to achieve, set smaller milestone goals at a month or the halfway point to ensure your meeting your own goal deadlines.

STEP 4: DEFINE YOUR GOALS

To get started, try to identify your highest-level goals (yearly or quarterly) first, then work backwards to determine the smaller goals/milestones you'll need to achieve in order to get there. To get started, just fill in the blanks and follow the instructions for each goal!

WHAT IS YOUR FIRST GOAL?

WHAT DO YOU WANT TO ACHIEVE AND WHO SHOULD BE INVOLVED? WHEN WILL YOU COMPLETE THIS GOAL AND WHY DO YOU WANT TO?

HOW WILL YOU MEASURE YOUR PROGRESS & HOW WILL YOU KNOW IF YOU ACHIEVED YOUR GOAL?

DO YOU HAVE THE SKILLS/TOOLS YOU NEED TO COMPLETE THE GOAL? IF NOT, CAN YOU OBTAIN THEM?

STEP 4: DEFINE YOUR GOALS

WHY AM I SETTING THIS GOAL NOW? IS IT INLINE WITH OVERALL OBJECTIVES?

WHAT IS THE DEADLINE AND IS IT REALISTIC?

YOUR NEW SMART GOAL:

Congrats! You just created your first SMART goal and you now have the tools to continue creating more (which we HIGHLY recommend you do). By crafting SMART goals within your business - you'll be able to achieve more and see more results in the long run than if you just put any old goal on a piece of paper. Finally, as the last part of this activity, we'll add it all up by putting your company's why, mission statement, vision statement, and top level SMART goals on one page that you can reference in the future.

STEP 5: INTRODUCE YOURSELF

Your business isn't simply a name on a business card, but an organization that was founded to solve a problem and achieve it's goals. Now that you've defined your why, mission, and vision and you've created SMART goals that will help drive your business forward - we can add it all up and introduce yourself to your customers and the world. Fill in your final statements and goals below - then keep it for a quick reference as you move forward!

MY COMPANY'S WHY (PURPOSE STATEMENT) IS:

MY COMPANY'S MISSION STATEMENT IS:

MY COMPANY'S VISION STATEMENT IS:

MY TOP THREE SMART GOALS ARE: