



The Compass Calibration Checklist



**Build connections that last a lifetime & deliver world-class
HX to everyone you serve**

Welcome!



We're glad you're here.

Thanks for taking the time to read the Compass Calibration Checklist.

Over the next few pages, you're going to learn how to:



Identify your brand's
key strengths and
weaknesses



Pinpoint your key areas
of focus for maximum
progress



Create a crystal-clear
game plan for the road
ahead

Since you're reading this, we're going to assume two things:

1. You've got an offering that you're proud of. Sure, you can always improve - but your product can deliver massive value to the right person.
2. Despite how good your product is, you know you could be having more impact... even if you're not quite sure how.

If so, then you're in luck. Because the document you're about to read is the product of 5+ years spent:



Serving dozens of businesses in the SaaS, service, and coaching spaces



Crafting crystal-clear strategic objectives that shed light on precisely what your next moves should be



Unpacking the subtle differences that separate the top performers from "also-rans"



Relentlessly battle-testing our theories against the real world, discarding everything that didn't work and refining whatever did

Our #1 lesson?

Connection is the key.

And that's exactly what this quick guide will help you do: build unbreakable bonds with everyone your business touches.

Create Connection That Lasts a Lifetime



World-Class HX doesn't happen by accident.
It's intelligently designed.

Today, success doesn't accrue to those who shout the loudest. It goes to those who are most remarkable.

Delivering standout HX in all you do: that's the stuff greatness is made of.

And you do it by optimising for connection across the following five domains:



Taken together, these five components make up your **platform** - the thing your business depends on.

You need two things to build deeper, more resilient relationships with the people you serve: a **standout** product and a **stellar** platform. Having just one isn't enough.

If you want five-star success, you need to build a five-star foundation.

So, what does actually look like?

Think of it this way:

Consciously or otherwise, everyone that interacts with your business is constantly grading your performance on the following scale:



World-class HX doesn't happen by accident. It's intelligently designed.

By attaining five-star performance standards across each domain, you massively stack the odds in your favour.

The secret to success is as simple to understand as it is difficult to execute:

Offer a five-star experience to everyone your business touches.

It's time to figure out where you're at right now. And more importantly - where you could be.



Over the next few pages, you'll read through a series of statements about your business. These are designed to help you calibrate your compass by assessing your current performance in each of the five domains discussed earlier.

If you fully agree with a statement, then put a tick next to it (don't worry about rating yourself 1-5 - that can come later). You're performing as well as you can - focus on improving in other areas instead!

But if you think you have room for improvement? **Keep that in mind.**

A future where you can rely on a five-star foundation awaits.

And with a base like that to build on, you'll find your journey (no matter what you're trying to achieve) gets that much easier.

Strategy

DOMAIN 1

Strategy is the bedrock of your business. Without knowing what you stand for, where you're going and what you hope to achieve, your journey is all but doomed. Don't travel unprepared - build your base and prepare for what lies ahead.

MARKET

- We have 1-3 detailed buyer personas of our target customers. These contain information about their personal and professional characteristics, core needs, motivations and challenges.
- We have a clear picture of our ideal customers - the buyers we would clone 10,000 of if we had the chance. We know precisely how to serve them better than anyone else can.
- We know who our top 3-5 competitors are - both direct (i.e. competing products/services) and indirect (products & services from a different industry that achieve similar outcomes).

OFFERS

- Our core product is battle-tested and offers a complete solution to a problem our customers face.
- We have a premium version of our product for customers with more involved needs, requirements, or desires.
- We have a bank of testimonials & case studies from customers who have successfully used our product to achieve a transformation in their business.

VISION

- We have a clear picture of where our business is headed over the next 3/5/10 years.
- We create monthly/quarterly/yearly action plans that align with our broad strategic vision. We regularly assess our progress towards these objectives to ensure we're staying on track.
- The entire team is aligned around our brand's goals. They understand how to prioritise for maximum progress.

Brand

DOMAIN 2

Your brand is not who you say you are. It's who your people say you are. It's how you show up in the world. How you speak, what you look like, how you conduct yourself across different channels and platforms - all of this and more. Above all, it's about consistency.

FUNDAMENTALS

- We have a professionally-produced Brand Strategy Guide. This provides an overview of our entire strategy & helps us make good decisions on an ongoing basis.
- We have given real thought to the values our business is built on. We have a clear-cut Purpose Statement and are confident it is appropriately communicated across all touchpoints.
- We're clear on the full scope of value that customers of our brand enjoy when they use our products/services.

VISUALS

- We have a professionally-produced Brand Style Guide. This explicitly details logo usage, typography, colour palette, brand graphics & photography.
- Our brand's colours and fonts have been selected to be eye-catching, accessible, and legible across all forms of media.
- We have different forms of our logo for use in different situations.

MESSAGING

- We have professionally-produced messaging guidelines. These inform the voice we use in all interactions with customers across our channels.
- We have a Positioning Statement that identifies the core benefit customers experience when they purchase something from us.
- Communicating in our brand voice is easy. It's simple to write marketing copy that attracts new customers and deepens our connection to existing clients.

Marketing

DOMAIN 3

Great marketing ≠ giving lots of money to Facebook and Google. It's having something worth marketing in the first place. Before you invest in distribution, focus on your keystone assets. The quality of your website, core content, and social media presence will make all the difference.

WEBSITE

- Our website has been strategically designed. It drives visitors towards taking key actions that matter for our business.
- Our website has been optimised to load quickly & look good on all devices.
- Our website is designed to fit perfectly with the specifications of our Brand Style Guide.

KEYSTONE CONTENT

- We use our customer personas to create blog articles, eBooks, and white papers that help them achieve their goals.
- Our content is accessible, actionable, and compelling.
- The tone of voice used in our content is consistent and recognisably on-brand.

AROUND THE WEB

- Our business has a well-maintained social media presence on at least one platform that's important in our industry.
- Our customers leave us a consistent stream of positive reviews and testimonials. These are showcased on our site & other key platforms (e.g. Trustpilot, Google Business, or another).
- Our social media usage creates real value for both the business and our followers.

Systems

DOMAIN 4

Systems aren't just for big businesses - far from it. If you care about being able to consistently achieve great results in any area, you need to think about how you can engineer predictable success. Systems are the key to unlocking sustained success for your brand.

FULLFILLMENT

- We have crystal-clear Standard Operating Procedures (SOPs). These rigorously outline how each of our products/services should be fulfilled.
- We leverage automation and technology throughout our fulfillment flow. This reduces the amount of human oversight required to complete routine processes.
- Product/service fulfillment is not dependent on any one person being available to complete associated tasks.

INVOICING & BILLING

- We use a high-quality billing system. This allows us to accept payments like clockwork with minimal administrative overhead.
- We conduct regular checks to ensure that all our customers are being appropriately billed.
- We have a clearly defined process for handling late payments and cancelled subscriptions.

CUSTOMER SUPPORT

- We have a dedicated customer support team. They're available to respond to queries on a regular, predictable basis.
- We have clearly documented communication protocols. Our support team leverage these to assist our customers in a consistently valuable manner.
- We have a robust knowledge base. Our customers can access this to resolve common problems they may have.

Distribution

DOMAIN 5

The critical final component. Premature focus on this area is counter-productive. But with everything else in place, distribution sets your ceiling. Social media, SEO, paid advertising and other marketing methods: leverage these well enough and you can do anything.

EMAIL LIST

- We prioritise email as a distribution channel. One of our primary goals is to grow our email list and keep subscribers engaged over the long run.
- Our emails are a compelling mix of educational content, insightful commentary and non-pushy promotion that serve our customers to a world-class standard.
- Our emails are sent in accordance with a high-level email marketing strategic plan. This takes important events and holidays during the year into account.

SOCIAL

- We post social media content that is valuable and engaging.
- We leverage a mix of organic and paid channels to maximise the effectiveness of our social media efforts.
- We have a well-formulated social media content strategy. We follow this on a weekly basis to build deep connection with our audience.

SEARCH

- We post long-form written/video/audio content that ranks well in major search engines. This is also valuable and engaging for our ideal customers.
- We leverage a mix of organic and paid methods to get the most out of search as a distribution channel.
- Our website and content is optimised to rank well in all major search engines.

Conclusion



What happens next?

Nothing. Not unless you want it to.

Consider it this way: every item you've checked off is a strong point in your foundation - something that's a five-star part of your platform.

But those empty checkboxes? Each and every one of them is an opportunity for growth.



Awareness is the first step. And yes: you can do a lot by yourself. But the journey is easier when you don't go alone.

For the past 5+ years, we've helped dozens of businesses to achieve one common goal:

Craft connections that last a lifetime.

Customers, employees, suppliers and more - your success across the board is dependent on the quality of connection you're able to create.

Completing this initial review has shown you where you need to improve. If you'd like some additional help, we'd be delighted to hear from you.

Next Steps

The first thing we do with our clients is to create a **North Star Roadmap**.

This is a process where we go deep and examine the strength of your business across each of the five domains. The end result is a hyper-targeted action plan you can use to stay the course on the long road ahead.

To learn more, just click the button below:

[Visit The Website](#)