

PARTICIPANT WORKBOOK

From Insight to Income

How Clear Problems, Measurable Goals, and Process Drive Profitable Growth

Your name: _____
Your business: _____

How to Use This Workbook

This workbook is yours. Write in it. Be honest. The value isn't in the exercises themselves — it's in what you're willing to admit on the page.

"You can't solve a problem you haven't clearly named. You can't improve what you're not measuring. And consistency beats inspiration every time."

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Module 1: Define the Real Problem

Most business owners are solving the wrong problem — efficiently. This module is about slowing down to look at what's really going on.

Key Ideas

- Customers buy relief from problems, not products.
- Symptoms are not root causes. Keep asking "so what?" until you hit something real.
- Clear diagnosis leads to clear positioning.

EXERCISE 1

The "So What?" Drill

Time: 5 minutes | Work independently, then share

STEP 1 — What is the #1 challenge your business is facing right now?

STEP 2 — So what does that mean for your business? (go one level deeper)

STEP 3 — And why is that happening? (the root cause)

STEP 4 — Have you ever said this out loud before? What does naming it change?

Your Positioning Statement (draft)

Use this sentence frame to capture your answer:

We help _____ solve _____ better than anyone else by _____.

YOUR VERSION

Module 2: Set Measurable Goals

"Grow the business" is a wish. A goal has a number, a timeframe, and a clear answer for what matters most.

Key Ideas

- North Star Metric: the one number that tells you, unambiguously, if your business is healthy.
- Leading indicators are the inputs you control. Lagging indicators confirm the result.
- A metric you don't review weekly is not a metric. It's decoration.

EXERCISE 2
Build Your Goal Stack
Time: 5 minutes | Work independently

NORTH STAR METRIC — The one number that matters most

LEADING INDICATORS — The 2-3 inputs you can control that drive the North Star

LAGGING INDICATORS — How you'll know it worked (revenue, retention, margin, etc.)

Your Review Cadence

Metric	How often I'll review it

Module 3: Build the Process

Talent gets you started. Process gets you somewhere. The businesses that scale have the most repeatable, trainable system — not always the best idea.

Key Ideas

- No process: everything depends on you. You can't grow without letting go.
- Undocumented process: knowledge walks out the door when people do.
- Wrong process: efficiency in service of the wrong goal is expensive.
- A documented process is equity. It can be delegated, improved, and handed off.

EXERCISE 3

Map Your Highest-Leverage Process

Time: 5 minutes | Work independently

What is the one process that, if more consistent, would have the biggest impact?

MAP IT — Write the steps in order (aim for 5-7)

1	
2	
3	
4	
5	
6	
7	

THE TEST — Could someone else follow these steps and get the same result? If not, what's missing?

Your One Next Action

These three modules are one system: name the real problem → measure the right thing → build a repeatable process to close the gap. That's it. That's the whole game.

The Three Big Ideas

Define the Real Problem	Customers buy relief. Be precise about what you're solving.
Set Measurable Goals	One North Star. Leading inputs. Consistent review.
Build the Process	Documented, trainable, delegatable. Process is equity.

EXERCISE COMMIT

Your One Next Action

Not "think about" — do. Specific. In the next 7 days.

I will...

By (specific date):

I'll know I've done it when:

Notes