THE LOYALTY SWITCH Workbook

How to make anyone loyal to you, your organization, or your cause.
Congratulations.

If you’re reading this, it means you care about the quality of your relationships and want to build lasting (and meaningful) connections with your clients, fans, employees, organization members, or partners. This Workbook is meant to help you map a strategy specific to your situation by using the universal principles of loyalty that have been the focus of my research, writing, consulting, and presentations for the past twenty years. It answers the follow-up question I receive most often after I introduce the human needs that create loyalty: “OK, so what exactly do I need to do to build a loyal relationship?”

That’s actually the perfect question, because asking “what do I need to do?” accepts the most fundamental premise of genuine human loyalty: Unbreakable relationships are not a result of you trying to change or manipulate someone else. Rather, they grow from reshaping your own behavior to fulfill the needs of the people you’re trying to reach.

This Workbook guides you through a process similar to the one I use as a consultant to organizations and individuals. First, identify a relationship of yours that you want to transform to a loyal relationship. Then, using this Workbook, examine and measure the state of that relationship with the three fundamental building blocks of loyalty: Safer. Easier. Better. This will help you narrow your focus and create a working model that you can replicate and customize to each group you want to reach.

Please remember, though, that building loyalty is an investment. It requires you to be strategic, deliberate, and consistent in your approach. When you do, you’ll find that those relationships provide enviable sustainability - enthusiastic and genuine advocacy, forgiveness when you make mistakes, and no loss in position when someone faster, cheaper, or newer comes along. Best, you’ll discover the satisfaction in making others’ lives more fulfilling while you reach for your biggest goals. You’ll experience the joy of a shared journey.

Thank you for taking this first step.
All of your relationships fall somewhere on a spectrum:

A loyal relationship is one that is nearly unbreakable. One that is never measured on price or ability. Those things matter, but not as much as other factors that create more emotional bonds. We are loyal to those who are indispensable in our lives and who always have our best interests at heart. Those who make our lives safer, easier, and better. Those who we trust unconditionally and view as partners and trusted advisors.
LOYAL

“I LOVE YOU!!!!”

A loyal relationship is one that is nearly unbreakable. One that is never measured on price or ability. Those things matter, but not as much as other factors that create more emotional bonds. We are loyal to those who are indispensable in our lives and who always have our best interests at heart. Those who make our lives safer, easier, and better. Those who we trust unconditionally and view as partners and trusted advisors.

PREFERRED

“I LIKE YOU...BUT”

When someone is in a Preferred relationship they are basically content and satisfied. They don't “love” you and will probably stay with you until something better comes along. But rest assured, when something or someone better does come along, or when they need to choose between you and some other alternative, they definitely will leave you or let you go. This is why satisfied relationships are never an indicator of long-term loyalty.

TRANSACTIONAL

“I DON'T OWE YOU ANYTHING. YOU DON'T OWE ME ANYTHING.”

Transactional relationships are viewed as equal exchanges with no further obligations. You made the sale, won the case, hit your fundraising goal, or released a new album. You fulfilled your obligation and they fulfilled theirs. They don't owe you anything more; neither side feels indebted to the other.

RELUCTANT

“I'M NOT SURE I WANT TO BE IN THIS RELATIONSHIP ANYMORE.”

Reluctant relationships are often looking for a way out. They have become stale and unfulfilling, but possibly even distrustful. They stay out of habit, nostalgia, or obligation, which often makes them feel like a hostage. It is possible that the relationship stays in this condition for a long time without ever moving up or down the spectrum. (“I only have 5 years to retirement,” “Changing to a new program is too complicated and time consuming,” “I hate their products and service, but they are close and convenient,” “I stay for the kids,” etc).

HOSTILE

“I HATE YOU!!!!!!”

When you have an antagonistic or hostile relationship, you don't just dislike that person, product, or service, you tell EVERYONE just how much.
SATISFACTION ≠ LOYALTY

Dogs are loyal

Cats are satisfied
Satisfaction is a **mood**
Loyalty is a **behavior**

Satisfaction is about the **past**
Loyalty is about the **future**

Satisfaction is about what you do **for them**
Loyalty is about what they do **for you**
THE EVOLUTION OF LOYALTY

Loyalty has been mischaracterized over time to mean something very different than what it actually is. Poets and philosophers have described it as a virtue that reflects some sort of high moral standard. Rulers, such as kings and queens, generals and Presidents ascribed it to a duty or responsibility. Marketers and fundraisers today have reduced it to a manipulated behavior where consumers and donors are incentivized to act in a certain manner. Even employers have imagined it as a means to assess the dedication of their staff. It is a concept that has been oversimplified by consultants who have conned people and organizations into believing that it can be measured by asking one question and by others who believe they are “owed” it for simply doing what was expected of them.

While the romantic ideal of loyalty as a self-sacrificing act of adoration has been perpetuated for centuries, the evidence suggests something altogether different. What appears to be a blind devotion to others has actually been a strategy for living—for surviving, optimizing, and flourishing—for nearly 4 billion years. Its roots can be found in chemistry, biology, and physics under different names such as fusion, bonding, symbiosis, and cooperativity, but the underlying principles, impulses, and outcomes are the same. When two or more elements merge and form lasting, cooperative bonds they compete more effectively than those that don’t.
What makes humans unique is our willingness to live among strangers and cooperate with others who are outside our family and kin group. It was a strategic choice our ancient ancestors made that elevated the 90-lb weakling of the Savannah plains to the most dominant species on the planet.

Living in large social groups changed the human brain. Potential threats were no longer hidden in shrubs or high grasses waiting for the right time to pounce. They were right there among us, every day. To survive, our brains needed to adapt the cognitive abilities to recognize which strangers posed a risk to us and which offered protection and opportunity.
How do you know that you are safe in a particular situation or around certain people? How do you know that others will be helpful to you and not make your life more difficult? And how do you know that a relationship will be fulfilling - helping you grow, develop, and achieve your goals and aspirations?

We rarely think about such things - at least not consciously. They tend to be a gut feel, some emotional trigger that gets activated and guide us through those situations. But, in truth, it is our brain that is constantly assessing the world we live in and the people we interact with and determining the kind of relationship we should have with them. It determines the level of threat and opportunity that exists and moves our relationships along a spectrum of possible connections - from hostile to loyal, or from hate to love.

For all of its complexity and sophistication, the human brain has a relatively simple purpose: receive input about the outside world, interpret its meaning, and coordinate some response with the rest of our body. Our emotions and affect - our gut feelings - are not physical entities that reside within our brains. They are mental constructs of our minds that allow us to assess and react to the signals it receives.

So, how do we know when we are safe, when our lives will be easier, and when our lives will be better? Our brain adapted mental constructs to evaluate each.
SAFER: A Sense of Trust

Survival is the biological objective of every living thing. For humans, surviving goes beyond eating, defending against predators, and reproducing. As social animals living in complex communities, surviving includes protection from all sorts of harm and risks. We take risks with our money, our liability, our information, our privacy, even our reputation. So, to keep us safe and protected from potential hazards, our brain constructed a sense of Trust - an ability to determine the threats we face in our relationships. What claws, camouflage, and a stinger does for other animals, the ability to determine who we can trust provides the same protection for us. It keeps us safe.

EASIER: A Sense of Belonging

A sense of Belonging is often described in emotional terms. We create love songs and poems about how it feels to be included, recognized, and appreciated by others and have reduced this mental construct down to simple, sentimental gestures. But that’s not why our minds devised this faculty. Our sense of Belonging supports the laws of thermodynamics that governs everything in nature. It looks to optimize our lives, find efficiencies that will save time, energy, and valuable resources that could be directed elsewhere.

When we form relationships with others, we are looking for someone who can make our lives easier - less burdensome and more productive. We seek proxies for ourselves. People who will think the way we do, act the way we act, value the things we value, and support what we support. It is nearly impossible to make someone’s life easier if we don’t know who they are, what they need, what they care about, what they worry about, what they are afraid of, or what they aspire to be or do. A sense of Belonging assures us that others understand us well enough to actually make our lives easier.

BETTER: A Sense of Purpose

A sense of Purpose is a product of our unparalleled human cognition. Flourishing in nature is the ability to grow, thrive, and reproduce. As biological creatures, we are built to do those things, as well. But as social animals living in not only the natural world, but the worlds we have constructed for ourselves, flourishing is about more than our physical development and passing on our genes.

We have brains that can predict the future, read the minds of others, calculate risks and rewards, understand language, create myths, and apply the solution of one problem to another. On their own, these are all useful cognitive skills that can help any individual survive. But something happened when our problem-solving brain started looking inward. We tried to understand our own lives and make sense of our existence. We questioned our origins (where we came from) and our final destination (what happens when we die). We looked for answers because that is what our brain is built to do, and that hasn’t changed.

Our search for Purpose and meaning is often thought of in purely existential terms. But it’s actually just our brain trying to solve the ultimate problem: Why are we here? Why do we matter? What is our life about? We form connections with those who can help us find answers to those complex questions. To flourish and make our lives better, our minds constructed a sense of Purpose.
A Strategic Approach to Loyalty

*Our relationships with others - including those that hold the keys to our fulfillment and success* - are often intuitive, undertaken without much thought or analysis.

*That is a mistake.*

Having a strategy for our relationships feels a little phony, like we are turning something that should unfold naturally into something a little contrived. We often think that the bonds we form with others should emerge without any premeditation or that connections are about a certain chemistry between two people or a serendipitous coincidence. While relationships are natural, being part of our nature (and nurture), they form in response to specific stimuli - the same as any natural outcome or reaction.

We don't balk at mapping out other outcomes we desire. We have strategies for most aspects of our lives, from developing a career to buying a home to avoiding traffic, or even potty-training an infant. Generals have military strategies, lawyers have prosecution strategies, politicians have campaign strategies, and marketers have communication strategies. We develop detailed plans every time we have specific goals in mind when the path to a given destination is not straightforward, and when the resources we have available are limited.

So why wouldn't we take the same deliberate approach when it comes to something as important as the people who impact our livelihood and success? Building a relationship strategy means you care enough to be attentive to the needs that create lasting bonds.

This workbook offers a step-by-step guide to building and maintaining loyal relationships - between individuals, organizations, and even in virtual, non-personal interactions. The key is to be strategic in managing them and not assuming they will *grow and develop through the magic of chemistry, kindness, or simply doing your job*. Using the following worksheets, you and your team can assess the current state of any key relationship by examining the levels of Trust, Belonging, and Purpose that exist and creating a strategic plan to improve them.
Assess your **individual relationship** with another individual

Assess your **individual relationship** with an **organization**

Assess your **organization’s relationship** with another **organization**

Assess your **virtual relationships**
Do you make their lives SAFER
Before developing a strategy and tactics for making the lives of your relationships Safer, you need to first spend time thinking about what is making their lives unsafe. What are the threats they face? What are they afraid of or worried about? What is making them vulnerable and susceptible? What challenges—current and potential—can cause them harm? What are their financial risks?
Trust is the bedrock of a loyal relationship, but it isn’t the end-all. In fact, it’s barely a starting point. Every relationship in your life - regardless of how important or inconsequential - EXPECTS you to be trustworthy. They expect you to be fair, honest, and ethical in your dealings with them, while treating them with courtesy and respect. They expect you to be competent at what you do, confident that you have the skills, experience, knowledge, and expertise that is required. They expect you to be consistent in your actions and behaviors, believing you will continue to be attentive to them and behave in a predictable, reliable manner. And they expect you to have the capacity to adequately address all of their current and future needs, possessing the right amount of resources, capabilities, and potential to support them.
A SENSE OF TRUST
"I don't trust you."

Imagining hearing those words. You would be offended, followed by hurt, before ultimately dismissing what was said. You would know that, of course, you can be trusted. Trust is not a universal belief. It is not a “thing” that we all recognize in the same way and agree upon equally. Instead, trust is an alignment of standards and ideals. When we interact with someone, we try and determine if they believe in what we believe, value what we value, and see the world the way we do. When they are, we trust them. When they aren’t, we don’t. It’s as simple as that.

It’s not enough that someone is competent. Their competency needs to meet our standards before we will ever trust them, even if those standards are unreasonable or prejudiced. The same holds true for their character, their consistency, and their capacity. Too often, organizations and individuals believe they should get credit for setting their own standards of trust. What they fail to understand is that we don’t care about their standards, we only care about our own.

**Trust is about alignment**
The Ultimatum Game

What the ultimatum game demonstrates is that we don't judge our experience on the outcome; we judge it on the process and our expectations of what we believe is fair. If you order a meal at a restaurant and it arrives in a timely manner and you receive the item and side dishes you told a waiter you wanted, you didn't get special service. You just got what you ordered. The outcomes of our transactions with others are what we already expect when we choose to do business with them. We expect people to do their job - to paint our house, to invest our money, to police our streets, to do our taxes. If they do what we've asked, we're even. We don't feel obligated or compelled to return the next time we have a similar need.

So what influences whether we return? It's the process: Your clients' individual perceptions of how honest, consistent, transparent, competent, etc., you prove to be. The same way the Ultimatum Game participant's view of fairness (whether a sum of cash should be split evenly or divided another way) influences their pleasure or displeasure at the outcome (unearned and unexpected money, either way), your clients and customers will judge you not on what you delivered - but on how. They have plenty of choices for people who can perform a service or offer a product, and most will probably deliver. If you only do the same, that doesn't mean you've earned their trust or begun to win their loyalty. You must meet and exceed their expectations for trust if you want to earn repeat business.
Trust is about alignment
We often think of Character traits as being black and white, right or wrong, acceptable or forbidden. But Character has many dimensions. It could mean honesty, fairness, transparency, respect, or generosity. It’s not black or white. It’s not about being good or bad. The most important aspect of character is not whether it is present - that you have strong character - but whether it aligns with what people want and need and also what they believe each of those components to mean. When considering whether you are keeping people safe with the character ideals you live by, you have to ask: Do your character standards align with what your clients and customers value and expect? And then: How do you demonstrate that they do?

For those who believe that fairness is of great value, they need to see the ways you or your company is fair. But what is fair is open to interpretation and just how fair isn’t always easy to measure. Take JCPenney as an example. In 2011, the company made what they believed was a smart - and fair - strategic decision: They would eliminate coupon sales (department stores are notorious for marking up items just to lay the groundwork for exciting sales) and instead offer everyday low prices. Sounds like a strong argument for transparency, fairness, and honesty. Guess what? It wasn’t what customers wanted. They wanted the coupons. They wanted to get a “great” deal. In trying to take the high road, JCPenney missed the mark on aligning with the values that mattered most to customers. By not offering coupon or discount, JCPenney customers felt like the company was no longer being fair. Do you see how trust breaks down? If what was fair had a universal definition that could be measured in an objective manner, trust would be easy to establish. But that’s not how it works. Trust forms when you and your client or customer are aligned and see things the same way.

Keep that in mind as you move through the exercises on the following pages. Be objective as you review the character standards that you believe company operates by and then be thorough when assessing the value your client puts on those same traits. Second-guess yourself. Look for evidence, or better yet, proof. Verify your assumptions. The goal of the workbook is not to reassure you of how loyal your client relationship is - although that may happen - it is to identify the gaps and reveal your vulnerabilities before they unexpectedly leave you for someone else.
The Ritz-Carlton’s motto is “We are ladies and gentlemen serving ladies and gentlemen.” This concept is entrenched in The Ritz-Carlton philosophy and can be seen throughout the organization where employees are treated like customers. The heart of The Ritz-Carlton is the common area, where employees take their breaks and which serves as the hub of the hotel. This area is as spotless as the main hotel, and every employee is courteous and respectful to his or her counterparts regardless of position in the organization. The managers all eat with the staff in a cafeteria provided to them free of charge with the same food served to the customers in the main dining rooms.

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Tagged CEO Greg Tseng described one of their most important perks as their transparency. Once a month the company shares their financials (revenue, expenses, profits, etc.) with their employees. “Before we make any major acquisition or decision public, we inform everyone in the company,” Tseng said. When someone joins the Tagged team, they will always know where the company is and what’s next.

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National Public Radio takes time at the end of most programs to share listener feedback on past shows. They share the glowing reviews, but also listener outrage, disbelief, and disappointment. What’s more, when NPR has made headlines for less than desirable reasons, the organization has reported its own bad news as if it were any other media outlet, rather than shifting the focus.
Consider the ways you, your team, and/or your organization demonstrate CHARACTER to your most important relationships. What do you do that makes them believe you are fair, honest, ethical and moral?

Is demonstrating CHARACTER (honesty, fairness, ethics, transparency, etc.) a deliberate focus of you, your team, and/or your organization, or is it just an assumed behavior? If so, how and where do you place this focus (personal interactions, accounting practices, through your website, through contracts, pricing, and membership agreements, etc)?

How do your most important relationships define fairness, honesty, respect, and transparency? What matters most to them? Have they left any clues from their own personal behavior, their company’s values, their interests or lifestyle, etc? Identify discrepancies between you, your team, or your organization’s character and what your most important relationships need to feel they are in a transparent and ethical environment.
Trust is about alignment
We often think of trust only in terms of our personal qualities and values - like those described in the Character exercise. But trust is about more than integrity. The good intentions of others don't amount to much if they don't have the ability to produce the results you desire. To trust them, you need to have faith in their competency - their abilities, experience, and expertise - as well as their character.

Cooperation with others has been the greatest differentiator between humans and all other creatures. Our ability to work, plan, create, and support others has elevated our species from a humble creature with unexceptional physical attributes to the most powerful force the world has ever known. That ability to cooperate with our ancient ancestors had to make decisions about others before they could cooperate with them, and one of the most important factors would have been whether others could contribute efficiently and effectively to the tribe. (Otherwise, they posed the risk of being dead weight, taking valuable resources and not helping the group enough to justify those resources.) Our need for competent partners is still true today. Imagine you're on an airplane that's just taken off, heading into a storm. How concerned are you that your pilot is generous or kind? You might trust his character, but what you need to know that you're safe - a few thousand miles above the ground - is to know that he's competent at guiding a plane through a storm.

It's not personal; it's practical. Because trust depends on context - the needs of the other person whose trust you are trying to earn - we have to remember that our efforts will fall flat if we don't perform or deliver in a way that fulfills their needs. Those depend on the person you're trying to reach and what they are supposed to trust you to do for them. They also depend on how those people define and evaluate competency.

Think of electric cars and the excitement around them. Developers have presented them as a solution for complex social problems: Lessened environmental impact with lower carbon emissions and pollution and even increased safety on the road for ourselves, our friends, and our families. Sounds spectacular. But, so far, there's a practical problem that keeps everyone from ditching their gas vehicles. People need a car that is affordable, one that they can rely on and have fixed without a hassle, and one that they can use for long distances (without worrying about finding the rare charging station in the middle of nowhere). For most people, an electric car is a nice idea - but they aren't going to trust it to do what they need until the supporting infrastructure is fully in place and until the price is less cost prohibitive for average families.

Before you assume you already do a good job at what you do, sell, or offer, spend some time thinking about how you would describe and measure your competency - and then compare that with what your customers would define as competent if were going to make their own list and choose you over a competitor. In a world of growing choices and options, they will be weighing and evaluating your skills and credentials - whether they do so in list form or not. You can beat them to it with the following exercise.
COMPETENCY EXAMPLES

To demonstrate the unbreakable strength of its safety glass, 3M manufactured several kiosks made of the material and placed them on city sidewalks throughout the US. They then placed $1 million behind the panes, daring anyone to break the glass and take the money. 3M was so confident in their engineering and manufacturing abilities that they were willing to risk millions of dollars to prove it.

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On every page of their website, Meritum Investments, Sydney Australia have a running, updated total of the money they have earned for their clients. The constant visual reminder communicates a very clear message: “Our investments make money!”

* *

FM Global is the largest property insurer in the world with a client list that reads like a Who’s Who of the most well-known brands and organizations ever created. In all of their annual reports, they include an in-depth profile of selected clients and benefit from a “halo effect.” Anyone reading the Reports can’t help but come to the conclusion “if FM Global is good enough for XYZ Corp., they have to be good enough for us.”

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KathArt Interactive is an award winning digital design agency based Copenhagen. Potential clients don’t need to dig through their website to discover their skills as a cutting edge creative firm. They are on display the moment you click on their URL. The visit tells you immediately that this agency knows what they are doing and is on the cutting edge of digital experience. Check for yourself: http://tour.kathart.dk
Think about a key relationship in your professional life and complete the following:

List and prioritize the top 5 competencies (ex: experience, expertise, skills, education, creativity, etc.) that relationship requires of you and/or your organization:

1. 

2. 

3. 

4. 

5. 

Now state the MINIMUM standard you believe that relationship requires for each competency (How much experience? What level of education/expertise? How much attention to detail? Just how creative? etc.)

1. 

2. 

3. 

4. 

5. 

How CERTAIN are you that YOUR list - your priorities and your standards - are THEIRS, as well? What proof do you have? Did they tell you? Did you bother to ask? Why don’t you ask them which competencies matter the most to them and see how aligned you actually are?
Trust is about alignment
Let’s step back for a minute and go back to what you’re trying to do with all these carefully completed steps. We are working on building trust by showing people they are safe choosing you; keeping people safe is one of the three key needs that loyal relationships fulfill. But the whole point of trying to build loyalty is that you want relationships that last. You want your customers to choose you today and next year and the year after that - even when flashy new competitors arise and offer unbelievable price breaks. You want them to stick with you, for the long haul. But you can’t ask them to give you what you don’t give them.

You can’t change or remove what you offered them to make them trust you in the first place - and you have to show that you’re not going to do that. To judge whether you are trustworthy and reliable to keep them safe long-term, you have to prove that you are consistent. Consistency often gets left out of discussions of trust - yet it’s probably the most critical of all of them. What we really want when we want someone to trust us is to believe that the way we act is predictable, based on our past actions.

Consistency allows people to go on autopilot. They don’t have to keep shopping around; they can stop looking for other options. But first, they need a benchmark for how you’ve performed in the past. Are you constantly changing your offerings? Do you say one thing and not deliver, or deliver late? They will look at your past performance and will assume that you will continue to act that way in the future - consistent or not. Staying consistent allows others to trust you. It means they don’t have to worry about whether you’re doing what they need the same way each time. It means the safety you offer isn’t going away. It means they can trust you.
At Enterprise Bank there is The Sundown Rule. It is actually quite simple. If a customer has a question, someone from the Bank will get back to them before the day is over. Period. No exceptions. What The Sundown Rule says is that their customers are important and they are committed to providing superior, responsive service all the time.

Acroturn, a metals machining company, delivers premium quality products at competitive rates. Their aerospace grade manufacturing, combined with their machining expertise and specialized manufacturing processes allow them to offer their customers a Zero Defects Promise.

In 1985, Danny Meyer opened the first of his 10 critically-acclaimed restaurants—Union Square Cafe, which went on to claim Zagat’s Most Popular Restaurant in New York City title an unprecedented nine times. On the first Monday of every month, Meyer and his team meet to ask one question: “How can we improve and become an even better place to work?” They have done this consistently for the past 29 years, canceling only one of these meetings during that time span...the week of September 11, 2001.

McDonald’s became a symbol of the fast food industry by making consistency a core tenet of its business model. Customers know what to expect and can rely on that knowledge when making a decision on where to eat. These efforts have not prevented McDonald’s from innovating its menu or restaurant design as it maintains the repetition and efficiency of its process.
Which of your behaviors requires CONSISTENCY in your relationships? Which behaviors are non-negotiable as far as your relationships are concerned? Are you certain? Have you asked?


CONSISTENCY is easily measured. How often do you evaluate each of your relationship interactions to ensure that you are acting CONSISTENTLY? Identify strategies to manage whatever hurdles stand in your way. Then set up reminders to regularly measure your CONSISTENCY and compare your results with your aims.
Trust is about alignment
Loyalty - a small group of people devoted to a cause, person, organization, or movement - is at the heart of all meaningful change the world has ever seen. But we seldom stop to consider that critical beginnings, the time before the start of something great, the moments when an incredible feat or undertaking is not a reality, but only an idealistic promise. At some point, the person leading the change has to convince others that his or her idea, business, service, or product is worth choosing, no matter the odds.

Even if you're an established company with proven products and services, your customers will experience this moment. They have other options. They have others promising to do what you do, only better and maybe cheaper. Regardless of the validity of those others' claims, part of making someone feel safe - even when they are taking a risk of time or money or loss of other opportunities - is showing them that you have what it takes to deliver on what you say you can do for them - your big-picture, end-game promise. This isn't about your past. Not your credentials, prior experience, or client testimonials. This is about you proving that you will do whatever it takes to bring them to that overall goal, that you are in this for the long haul.

How are our minds trained to judge and measure capacity? How will your customers know you are the business that will go to go to extreme lengths to make sure that the products and services you offer that keep them safe - and will keep them safe for years to come?

Capacity is not just about whether you have enough resources, the financial stability to stay in business, or enough people in your call center in case they need late-night assistance. It's also not just about whether you have enough brainy engineers working on fixes to make sure you're identifying and solving new problems for your client. Capacity includes your ability to provide that in the future as well - and your willingness to fight to keep those resources, and find new resources, for the long term.

CAPACITY
CAPACITY EXAMPLES

Jeff Bezos, founder of Amazon often uses the phrase, “It’s not about the how or the what, but the who.” As a company that relies on innovation and breaking new ground, the capacity of his people—to learn and grow—is more important than their experience. When you are doing things that have never been done before, it is the capacity of your employees that needs to be your focus.

✶

When Tom Brady was chosen in the 6th round of the 2000 NFL draft, the New England Patriots knew they had a steal. No one else did. It wasn’t like the Patriots wanted to draft a tall, lanky quarterback that ran a slow 5.3 in the 40 yard dash. Those weren’t the traits they were looking for. What they saw in Brady was his capacity to improve. They saw his mental makeup was way ahead of his physical skills and took the chance. The result has been six Super Bowls and four MVP trophies.

✶

Kate Crosby operated a tiny soap and lotion business in Virginia when she decided to go for broke and ask Cracker Barrel to carry her products. Crosby was only looking for placement in a few of the restaurant chain’s 538 stores, but Cracker Barrel liked her product and thought it would be a great fit for its “Half Restaurant, Half Store, All Country” brand. The only question was whether she could provide the quantities required while maintaining the quality. Could they trust in her capacity to grow and meet the restaurant’s demands? After reviewing her operation, her and her detailed plan for expansion, they increased their purchase orders from a few hundred to 100,000.
What limits of your CAPACITY (time, money, experience, influence, staffing, etc.) have had the greatest negative impacts on your professional relationships and their perceptions they have of you?

What opportunities do you have to expand both your CAPACITY and the value you offer to your relationships?

How do you, your team, and/or your organization demonstrate and communicate your CAPACITY to your most important relationships? Can you do more than they think you can, or is your CAPACITY less than they expect? How can you show them that you are capable of more or of achieving what you envision (even and especially if it requires risk-taking on their part)?
Do you make their lives EASIER
PREFACE

Before developing a strategy and tactics for making the lives of your relationships Easier, you need to first spend time thinking about what is making their lives harder. What consumes most of their time? What are the complexities of their job, industry, markets, etc? What are the most difficult aspects of their job/life? Is their biggest challenge time? Access? Knowledge? Money? Technology? Support? Influence? Representation? Diversity?
The real key to making someone’s life easier is to establish a sense of belonging. Recognizing everyone as unique individuals. Having insight into their hopes and fears, challenges, and opportunities. Being proactive in solving their problems before they ask for help. Making them feel included, wanted, appreciated, and valuable. Offering them an identity they can relate to or aspire to, through common and aligned interests. It is impossible to make someone’s life easier unless you know who they are and understand what they truly care about and need.
A SENSE OF BELONGING
Think of all the pressures businesses face in an environment of global competition. To stay ahead and grow, there's a constant drive for greater efficiency, product and service improvements, meeting budgets ... the list goes on and on. And then there are other numbers. It seems there are more ways than ever to quantify and calculate customer types and behaviors. Those data sets can be incredibly useful tools. Added to the other pressures of running a financially viable operation, though, they can make it hard to remember the relationships on the other side of those transactions. With so much emphasis on metrics, data, and demographics becoming part of how we operate our businesses, it's easy to lose sight of who those figures and data represent: real people. That's not a problem if all you need is one purchase from a client you'll never need to do business with again, but it's a huge problem if you aim for relationships that last, especially with so many competitors ready and willing to take your place.

Why does recognition - your willingness discover information about your relationships and what they care about - matter?

Humans evolved to rely on others - but our minds adapted to help us choose the right others, people who would know who we are and could provide the sense of closeness we lost as our groups expanded far beyond small tribes of family members. One tool for measuring whether we belong with someone is whether they recognize us, not in a superficial way but in a way that shows someone has put effort into knowing who we really are (and more effort than others bother to invest). That's the reason our brains light up in multiple regions when we hear our own name; being known and being recognized is a potent motivator (and also the sentiment behind Starbucks scribbling your name on your cup). Showing that you know someone, that you care about a customer - beyond their immediate purchase - signals that you someone they belong with. It makes you stand out from the crowd as a candidate for a lasting relationship. How do you show people that you truly recognize who they are? First, you or your team should gather everything you can find - past accomplishments, LinkedIn profiles, Facebook - anything public is information they want the world to know about who they are.
AWARENESS EXAMPLES

Umpqua Bank doesn’t just use their social media platforms to promote themselves, they use them to recognize their customers, as well. Their larger following gives more exposure than their customers could get on their own.

✨

Every employee at Cloud Nine Level is issued a ‘G’ Book (‘Good Stuff’) to write down accomplishments of team members – whether personal or work-related. Every week at an all company meeting they read aloud the past week’s ‘G Book’ entries.

✨

Every year since 2003, the Greater Orlando Aviation Authority has sponsored their Annual ‘Share the Art’ National Arts Program® Employee Art Exhibit. The airport has supported the arts in the Orlando area for decades, but this show helps it recognize the talents of airport employees and see them in a totally different light.

✨

Spotify recognizes the anxiety and demands that go with parenthood. The company pays for egg freezing and fertility assistance and six months of paid leave after a baby is born or adopted. In addition to this, new parents also get a month of flexible work options so they can ease into their return to work.

✨

Shelly Regan has been a senior manager at several Fortune 500 companies. At each of her jobs, she creates a file on all of her direct reports—collecting the information they share with her—collecting the information they share with her that matters to THEM. Rather than relying on her memory, she references the file when thinking of ways to reward or recognize her staff.
Consider the ways you, your team, and/or your organization RECOGNIZE your most important relationships. What do you do that makes them believe you see them as a unique individual?

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How well do you, your team, and/or your organization know your most important relationships? How much do you know about them personally (beyond the superficial and apparent) and how much time do you spend trying to learn more?

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When communicating with your most important relationships, how do you, your team, and/or your organization demonstrate RECOGNITION? What specifically do you do that makes them feel like the unique individual they are?

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Belonging is about connection
Now that we've covered some of the ways you can and should make your most important clients feel that you know who they are, you're a step closer to making yourself invaluable - but only if you use the information you've gathered and really consider what else you could possibly provide to the person you now know more deeply. Insight is investing the time into knowing their struggles and concerns - and I mean in addition to the products or services or solutions you sell them.

Insight is a form of empathy where you perceive and understand that their lives are busy, complex, and sometimes full of risks. It means going above and beyond what others will do to provide answers to their unspoken problems, concerns, and needs. Those can be unarticulated - or even unrealized.

Consider this story that I often share in my presentation: The man-buying-mom-flowers story.

That's a savvy move because it makes the customer's life easier in an extraordinary way, using information the florist understood about the customer (he has trouble remembering his mother's birthday). That's insight. That's a customer who doesn't have to bother looking for a new florist, ever again.

What needs do your clients or and customers have that they don't even recognize themselves? Insight is an ability to understand what someone is thinking and feeling, what they are not telling you or what is difficult for most to see. The people who "get us" — usually the people closest to us — are people who understand the concerns that cause our anxiety or keep us up late at night or the dreams and ambitions we don't tell just anyone. What happens when you offer help with those unspoken or even unrealized anxieties or ambitions before you're asked? You can make yourself someone others feel like they belong with - for the longest journeys.
INSIGHT EXAMPLES

At Zappos, managers and team leads are encouraged to spend 20% of their time hanging out and socializing with their team. “If you take the time to get to know your employees, I mean really get to know them, you will be able to become a mentor,” says Marcela Gutierrez, Manager of Zappos Insights and New Hire Training. “The difference between a mentor and a manager is that you will know how to coach them and help them achieve not only professional but personal goals. They will also work harder for you because they will trust you 100%.”

At Nokia informal mentoring begins as soon as someone steps into a new job. Typically, within a few days, the employee’s manager will sit down and list all the people in the organization, no matter in what location, it would be useful for the employee to meet. The manager sits with the newcomer and reviews what topics the newcomer should discuss with each person on the list and why establishing a relationship with him or her is important.

When A.G. Lafley was CEO of Procter & Gamble, he worked to create a culture where everyone in P&G—from the chairman down—would spend time living with consumers, shopping with consumers, or working alongside consumers. While working on Tide branded laundry detergent, Lafley discovered that P&G consumers would regularly report that they loved Tide’s packaging. Yet, when he interacted with a consumer, he noticed that she almost always used a screwdriver or scissors to open the Tide box. Lafley realized that the woman didn’t want to risk breaking her nails opening the cardboard box. She said she loved the packaging because she didn’t know of any alternatives, but in reality, she had to find a creative way to open the box because of its design limitations.
Consider the ways you, your team, and/or your organization demonstrate INSIGHT to your most important relationships. What do you do that makes them believe you understand what is going on inside their world and know what they truly care about?

How much time do you think your most important relationships spend thinking about you? If they aren't thinking about you, what bigger issues in their life are they thinking about? How can you, your team, and/or your organization help your most important relationships solve those bigger issues?

How do you let your most important relationships know that you have INSIGHT and that you understand the real challenges and concerns they spend most of their days dealing with? How can you demonstrate INSIGHT?
Belonging is about connection
Think about a few of the most impactful innovations over the past century: automobiles, Internet, cell phones. None of those seemed necessary at the time they were being developed. (Think of the famous “faster horse” quote often attributed to Henry Ford.) But few of us could imagine living without any of those now.

How did those inventors - indeed, any of history’s visionaries - come up with ideas that didn’t seem to respond to existing problems? They thought not just about what people needed today (insight), but also about what people would need in the future.

Humans are cooperative beings, but that’s because cooperation and reciprocity have benefitted us from a survival standpoint. We help others when they need it and, in turn, we hope others will someday help us when we need it. Someone who provides help proves that he or she is worth our investment of time, effort, or money. Developing a gift for foresight or demonstrating proactivity - anticipating and responding to someone's needs before they ask for help or even before they know they need help - puts you in a position to earn loyalty because it makes you a more worthy alliance than others who might lend a hand, but only when directly asked. Think about your customers - and think ahead for your customers - and you can make yourself indispensable.

A special kind of sight

Recognition, insight, and proactivity - together - allow you to offer the kind of benefits that can be invaluable to your followers, especially if you make it a continuous part of how you or your company operates. When you truly recognize people – when you know who they are and actively demonstrate that you do – and you have the insight to see what potential exists to meet their unspoken needs, stresses, and desires, you can look ahead. You can see past the needs your followers have today – and what hidden resources may be available to answer those – all the way to what needs they may have tomorrow, or next year. You can anticipate their problems, even those they don't see coming. You can be proactive. With recognition, you see who people are. With insight, you see ways they need help and you can care for people today. With proactivity, you can care for them in the future. It's a burden you lift from their shoulders, a way you make their lives easier. That's a relationship they'll want to hold on to.
FORESIGHT EXAMPLES

The Rocky Mountain Chapter of Special Libraries Association (SLA) have adopted a "buddy" system to make attending chapter events less intimidating and uncomfortable. The "buddies" will reach out to those members who may be reluctant to attend an event alone and make plans to go with them. In addition, the buddy will serve as a connector, introducing the reluctant member to others and helping them to form new relationships with colleagues.

The Grand Del Mar resort in San Diego, CA trains its staff to anticipate guest needs, not just respond to requests. Mention that you are heading to the beach the next day with your kids, expect them to have a package of sand toys delivered to your room or placed in your car—because who packs a pail and shovel when going on vacation?

Safelite Auto Glass anticipates the potential anxiety their customers may have regarding a complete stranger coming to their home or office and working on their vehicle. In addition to emailing the customer a confirmation of the scheduled appointment, Safelite sends a photo of the technician who will be doing the work, and a short biography outlining their experience and qualifications.

When Homestead Kitchens of Littleton, MA builds and installs a kitchen, they understand the inconvenience of being without a kitchen. Homestead anticipates the needs of their customers and has the foresight to solve a problem without the family asking. At the start of the job, Homestead provides their customers with gift certificates and coupons to several local restaurants they have developed relationships with, knowing their families will need to find alternative places to eat during construction.
Consider the ways you, your team, and/or your organization exhibits FORESIGHT with your most important relationships. How often do you look into their future and anticipate what they will need – providing them with solutions before being asked?

Do your most important relationships think of you, your team, and/or your organization as advisors they need going forward and into the the future? Are you an indispensable resource in their lives? If so, why? If not, why not?

How much time do you, your team, and/or your organization spend developing solutions for what your most important relationships need next week, next month, next year, the next five years? Do you spend more time thinking about what THEIR future challenges are or what YOU, YOUR team, and/or YOUR organization's future challenges are?
Belonging is about connection
INCLUSION

Transactional (breakable) relationships have two sides: yours and theirs. You’re getting what you need from a relationship and they will stick around as long as they are getting what they paid for - and as long as no one else offers to give them a little more for their dollar or time and as long as no one else promises to do it better. Lasting relationships include both sides - and value more than a single outcome (money, product, or service). Making someone feel included means that they are not only invited to participate, but encouraged. Their suggestions are not just noted, but also acted upon.

Think about Facebook and all the resources at the company’s disposal. Have you ever had a question or concern about your personal or business account? Do a little looking around … and you’ll discover there’s no way to directly reach Facebook for help. They have a help section, some frequently asked questions and responses and then discussion groups - from other people with questions or concerns. If you’re a business page administrator, they’ll send you message after message about buying ads, but if you respond to one of those, you get a robo-response that they “can’t” respond to messages and a link to help section, frequently asked questions. Talk about feeling herded, ignored, and excluded.

Inclusion can mean being there physically to respond to others and making them feel included; it can also mean being responsive in virtual mediums: emails, social media posts, even phone calls. (If you think this is a no-brainer, think about this 2018 statistic from a 1,000-company survey: 62 percent do not respond to customer service emails.) Think about your policy for responding to all of the above. Do your customers pose questions, praise, or concerns into an empty vacuum? What’s your average response time to customer emails? Imagine not showing up to a meeting with a client. You’d never do that; right? Not being responsive to emails is the virtual equivalent of shutting your door to your customers. You make them feel left out, not listened to, and alone. In other words, excluded.

To offer someone a sense of belonging, you must first demonstrate that you have paid attention to who they are (recognition) - but then you need to show that you value who they are by accommodating them, listening and responding to them, and making them feel included. Inclusion can also be expressed by your availability, accessibility and collaboration, as well as your process for welcoming and soliciting input from your important relationships.

Exclusion suggests that one is not valued, trusted, or welcome
INCLUSION EXAMPLES

Trader Joe’s is known for treating employees with a measure of respect and dignity that is virtually unequaled in the supermarket industry. Everyone from vice presidents to clerks are encouraged to come up with new ideas, all of which are taken very seriously and often acted upon. While Trader Joe’s stores have very clear spending and behavioral guidelines, they have few execution guidelines—meaning the corporate office may tell workers what to do but not how to do it. Basically, the company believes that people—given the opportunity—usually make good decisions about things like signage and merchandising.

At Southwest Airlines, leadership wants a culture where employees feel they are part of a family. They believe it is very important for organizations to have products and services around which employees can feel proud and that organizations need to leverage the talents of the employees by letting their ideas come forward.

Hudson, Mass.-based Avidia Bank built a social media feed that shows a behind-the-scenes view of everything that goes on at the bank and have been able to use it to acquire new talent by showing off their corporate culture.

At GoFundMe, each month employees get to select a campaign that they believe deserves a $1,000 donation. The company doesn’t just provide a platform for that allows people to raise money for a cause, they give their employees a voice to support it.
Consider the ways you, your team, and/or your organization INCLUDE your most important relationships in matters that could effect them. When and how do you value their participation in the work you are doing with them?

How often do you seek your relationship's advice and input? If not often, why not? What are the barriers that prevent you from creating a more INCLUSIVE relationship?

What 3 things can you do to make your relationships feel more INCLUDED, welcomed, and valued? Identify any factors that could inhibit inclusion: Culture, jargon, location, time, etc. What three changes can you make to INCLUDE, welcome, and value your relationships? (Change meeting times/locations. Highlight and reward feedback. Respond to each suggestion or comment.)
Belonging is about connection
Imagine you live in a medium-sized town, with a couple delis available within a few miles radius. They offer near equal quality and variety, and all are mom-and-pop operations you’d like to support. But one of them, “Our Girls,” has a proprietor who sets up a cart at softball stands where your kids play. Like you, they have children they are chest-swellingly proud of. They’ll tell you about them while they fix your reuben; they even named the business in the girls’ honor. You know little or nothing about the personalities behind the other deli counters in town.

Which business are you more likely to dial when you need a sandwich tray for your next party? Parents have to stick together, right? So do skiers, alumni, and historical romance readers. We are drawn to people who show they are like us in some way. You know, instantly, there’s an existing connection, a sense (logical or not) that there’s greater likelihood that the two of you share other commonalities. It feels comfortable and right.

That’s because we look for where we belong, and we look for those who can give us the feeling that we do. That feeling, the emotional connection, is the romantic face of a practical requirement. It’s how we know who will make our lives easier. If you can find someone who is like you - even if it’s a seemingly superfluous, or skin-deep, attribute - you’re more likely to see them in a positive light. You’re drawn to them more easily than you are to people who are different from you. That’s why conference attendees given their own choice of where to sit will often naturally segregate by gender and age range. It’s a hardwired shortcut for us to find people who are more likely to think the way we do and share the same interests and goals.

But proving commonality and sparking chemistry with your relationships doesn’t mean you should limit yourself to doing business only with people who look like the majority of your organization’s staff (you shouldn’t, of course). It does mean you should look for ways to express who your organization is and what you represent and help your relationships discover those common threads - something that feels familiar, comfortable, or even inspirational. You can do this by enticing design-and-beauty fanatics with unforgettable packaging in everything associated with you. You can do this by talking sports with relationships you know are fans of a specific team. You can do this by sharing some of your company’s core values and positions. You can do this by expressing authenticity or even posting staff bios that go beyond resume clips. The key is to give people something they can identify with - something that makes them feel like you are like them or worth aspiring to be like.

Of all the elements that define belonging, identity is the most powerful. It is the principle that can make up for a deficiency in the others - because, when all is said and done, what we desire most is to be welcome into a relationship that feels familiar and safe with people we can trust who have our best interests at heart and care about the same things we do. People just like us.
IDENTITY EXAMPLES

Every day at about 5:30 p.m. the Fundable team turns off computers, ends client phone calls, and gathers together for a happy hour featuring a giant NBA Jam tournament. It’s a great reward at the end of a productive day, and it is one of the best ways to allow co-workers from different departments to catch up or get to know each other.

Howard Stern has been on the airwaves for over 40 years. But how did a shy, nerdy teenager become the self-acclaimed King of All Media? Stern realized early on that he should be honest rather than just being entertaining. He has a deep understanding of what his audience wants and will tolerate and isn’t afraid to broach any subject with his guests. His audience identifies with Howard. He is their subconscious, asking all the questions they want the answers to and doing all the things they wish they could to, if they had the courage.

First Bank Financial Centre created a social media campaign that places a bobblehead of the bank’s CEO in front of different local attractions and asks followers to guess the whereabouts. “Where’s Mark Wednesday” has become a popular feature and humanized the bank, showing its CEO as an approachable guy with a sense of humor, the kind of guy you’d like to sit down and have a cup of coffee with.

When PR firm Dixon Schwabl interview prospective employees, they ask questions like; “What do you like to do at night or during the weekend?” to better understand who they are, beyond their skills, experience or education. If hired, the company highlights those interests on their website page.
Consider the ways you, your team, and/or your organization create an identity with your most important relationships. When and how do you create memorable, enjoyable experiences and how do you demonstrate your common and aligned interests?

How consistent are the experiences you, your team, and/or your organization create for your most important relationships? Is a personal experience different from an online experience? Can your most important relationships see a consistent and familiar quality in everything you, your team, and/or your organization do?

How much time do you, your team, and/or your organization spend thinking about how your relationships’ experiences with you demonstrate that you have something in common with them? How often do you review and evaluate those experiences for a consistent and recognizable identity?
Do you make their lives BETTER
Before developing a strategy and tactics for making the lives of your relationships Better, you need to first spend time thinking about what is making their lives unfulfilled. What gives their life meaning? What causes do they support? What are their aspirational goals? What do they value? What principles and ideals do they value?
While establishing a sense of trust and belonging are critical to any relationship, it is a sense of purpose that is most often responsible for someone becoming loyal. Trust and belonging are often “satisfiers” for any close relationship, but identifying a sense of purpose is what draws us to others and creates nearly unbreakable bonds. When individuals and organizations stand for something and convey to others an intention that is not only clear and identifiable, but aspirational, they establish connections that go beyond simple economic transactions. Our lives become more meaningful.
A SENSE OF PURPOSE
Loyal relationships are built on the *why* of an individual or organization - not the *what*. No matter what you do, make, or sell, people need to see and understand the bigger picture of why you’re in business and what it means, not just to them but to something greater than them.

**Why?**

The answers lie in our ancient (and even prehistoric) symbols. Look back through history and you’ll find that, entwined in our earliest civilizations, there are signs that we didn’t just seek shelter and sustenance. We took time away from hunting, gathering, and guarding - those actions that kept us alive - to carve out our homage to deities and invest time in ritual that made every member of a group part of something with impact that lasted longer than his or her existence. We humans, in our unique self-consciousness, have always wanted to know that our lives matter, that we could join with others to be part of something bigger than ourselves. That self consciousness and storymaking capability that we applied to judge how others - potential partners - would act if we entered a relationship with them also applied to where we fit into the greater whole. Who am I? Do I matter? Will I matter after I die? These are old - very old - questions and they are still part of who we are today.

The first step in showing someone you can help answer that yearning is by defining you/your organization’s cause, by carving out your own purpose. Despite the lofty need this represents, your focus does not have to be something we’d traditional define as a worthy cause (though those fit the bill quite nicely). It can also be a solution (think of Warren Buffett's lifelong focus on a patient approach to building wealth), an intention (Patagonia’s mission to cause the least damage to the earth as possible in their products), or a way of living (like Southwest Airlines’ emphasis on having fun at work). Whatever it is, you need to be clear about it and you need to make sure it’s reflected in everything you/your organization undertakes.
Radio Flyer has a simple objective: create an innovative environment where every employee can say “This is the best job I’ve ever had.” To reach that goal, the company offers programs and benefit options that include summer flex hours, an on-site gym, two days off per year to volunteer in the community, development workshop opportunities and committees surrounding a variety of Flyer’s interests.

Southwest Airlines allow their flight attendants to go off-script: cracking jokes, singing, and doing whatever it takes to get passengers to pay attention to safety videos. This unique approach has had positive results both on the aircraft, where the passengers enjoy the show, and on the web, where videos of the improvised Southwest Airlines safety shows are uploaded by passengers and go viral.

At Intel, innovation is everything...all the time. 2009 was a tough year for the company. Demand for its chips plummeted as PC sales suffered, but the massive chipmaker, which controls 80% of the world’s PC microprocessor market, kept innovating. It launched the first-ever 32-nanometer chip, a smaller, faster, more powerful chip that became the industry standard. It was developed as part of Intel’s “tick tock” strategy—a goal to introduce new cutting edge products every 12 months. Every customer and employee of Intel understands the company’s purpose...innovate, innovate, innovate.

Warby Parker doesn’t just sell glasses. It’s purpose is helping the world see better. For every pair of glasses purchased, Warby Parker donates another pair to non-profit organization VisionSpring, which provides glasses to people in developing countries.
Do you, your team, and/or your organization have a purpose - beyond creating a product, delivering a service, and making or raising money? If so, what is it? How can you make it more clear, defined, or understood?

How do you, your team, and/or your organization communicate your purpose to your most important internal relationships (employees, managers, leaders, etc.)?

How do you and/or your organization demonstrate and communicate your purpose to your most important external relationships (clients, customers, members, fans, etc.)?

How do you and/or your organization demonstrate and communicate your purpose to your most important external relationships (clients, customers, members, fans, etc.)?
FELLOWSHIP

Having a focus and staying committed to it (through everything you do and all your lines of business and processes) is admirable. Those steps will likely make you and your organization members’ lives more fulfilled and worthwhile. But they won’t make your relationships’ lives better until you give them opportunity to contribute to, or participate in, your purpose.

Think of all the companies who hold press conferences to announce a cause they are donating to. Typically, it’s a lot of suits, a giant check, and some bright camera flashes to capture the moment for their next email blast. They might be giving to a worthy cause using profits culled from their business with you, but that’s the only technical involvement you had in the donation.

As humans, we are driven not just to see improvements or big goals accomplished from the sidelines. We have an innate need to be part of that greatness, to feel like we matter in the grand scheme of things. Posing with a cardboard check doesn’t give your relationships any reason to think or feel that they’ve made a contribution. You did something with their money. And you made it all about you.

Purpose is only appreciated and loyalty-building when it is shared. There’s a reason people who practice religion don’t typically practice it alone. Being connected to a greater purpose involves a collaborative effort. It can’t just be you. And it can’t just be them, alone. But you can enable them to join in fellowship with your purpose, when you give them ample opportunity to participate in the community you’ve built around your organization’s cause.
The Grateful Dead were committed to anti-authoritarian values and a benevolent view of humanity. This did not just come through in their music, but in the way they ran their business and the way they treated their fans. While most musical artists took extraordinary measures to protect their copyrights and trademarks, the Dead allowed fans to tape record their concerts and share the bootleg copies with one another. Rather than hurting the Grateful Dead's business, their fellowship with fans made them more successful. Fans shared tapes which drew even more people to their scene. The Dead lived the values they sang about and created a fan base that continues to grow after nearly 50 years. Performers, including Bruce Springsteen, Phish, and O.A.R. have similarly allowed their fans to freely record their concerts.

Nike's purpose is to make people healthy and help them perform at their athletic best. Creating athletic gear is one way to make that happen. But Nike creates a fellowship with their customers. By creating technology, including apps and online tools, that allows amateur athletes to track and compare their performance to the professional athletes they aspire to be and motivates them to reach their goals.

Maker's Mark is the gold standard in the bourbon world. Every ambassador receives an annual Maker's themed present, ranging from bottle scarves to holiday themed labels. You also receive business cards showing that you are an ambassador with your name, ambassador number, and join date. Your name will go on a barrel and you will receive a certificate stating your ambassador info and the barrel number. You can track your barrel's aging online or via an app. When your barrel is ready, it will be mixed with other barrels to keep that Maker's Mark classic flavor. You can then stop by the distillery and purchase a bottle with your name on it which contains some of the bourbon from your barrel.
How do you engage your internal and external relationships and help them to feel like they are part of your purpose? If you currently don't, how can you?

Internal (employees, managers, leaders, etc.):

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External (clients, customers, members, fans, donors, etc.)

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Choosing and articulating your focus/meaning/vision is a great first step in establishing a sense of purpose. Your focus outline your purpose and tells others that you have a reason for being, or a reason for being in business. But you will undermine your efforts if you waiver, not just in what your purpose is but also in where it's implemented.

Think about all the different processes and operations housed just within your silo of your organization. Now, broaden the scope and apply it to your entire organization. Do your practices - across the board - align with what you’re supposed to be about?

Think about the clothing retailer Patagonia. The company has publicly expressed an interest to create a sustainable business that does as little damage as possible to natural resources in the products it sells. But this isn’t just marketing copy or a footnote for the company’s buyers. In 1994, the company launched its first environmental assessment to identify waste within the company and room for improvement in its products, starting with the first links in the supply chain and continuing to the shelves.

Cotton, which contributes millions of metric tons of greenhouse gas emissions annually, came up as a culprit in that first study. Within two years, the company met its goal to switch to 100 percent organic cotton for all its cotton products, an endeavor that took company representatives past existing suppliers to supporting new farmers (because there weren’t enough suppliers growing organic cotton to fulfill Patagonia’s orders). As a result, new organic farms sprung up and were able to stay in business, Patagonia’s made the switch - and then the company influenced other companies to do the same. The overall goal made it through every level of the retailer’s lines of business … and out to other businesses.

So many organizations have claimed to be concerned about the environment. Patagonia claimed it, and then did it, and then kept it up.
COMMITMENT EXAMPLES

Food and agribusiness companies, including Starbucks, Unilever, Nestle, P&G, SC Johnson, General Mills, Mars, McDonalds and Walmart have committed to sourcing sustainable palm oil for 100% of their products by 2016 to ensure that rain forests in Indonesia are not completely destroyed. The commitments have been led by shareholder demands.

West Monroe Partners, a business and technology consulting company, created its 1+1+1 Program to affirms its desire to give back to its communities and its people. West Monroe commits 1% of its Time + 1% of its Talent + 1% of its Treasury (profits) to community projects. In addition, for every hour one of its employees volunteers to the 1+1+1 Program, they receive an hour of personal time off the following year.

For more than 140 years, Prudential Insurance has called Newark, New Jersey home. Despite all the city's storied political and economic travails, Prudential never gave up on it. But Prudential didn’t just keep its headquarters in Newark, it actively invested in it. And every time the bottom dropped out on the city, it worked to rebuild it. In 1976, when Newark was at its lowest point, it launched a multi-billion-dollar program to work with public, private, and non-profit partners to promote financial and social mobility for underserved populations, concentrating on housing, health, energy, and jobs.
Consider your purpose. How do you measure your commitment to it? Do you assume there is commitment or do you actively measure and monitor it?

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Are there limits to your commitment? Are your relationships aware of those commitments? If so, how have you made them aware? If not, how can you make them aware?

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Have you publicly stated your commitment to your purpose? If so, how? If not, how could you?
WORKSHEETS
Relationship Strategy

1. List 20 of your key relationships (internal to your organization or external):

<table>
<thead>
<tr>
<th>Name</th>
<th>Value</th>
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**Value:** On a scale of 1-10, assess the current or future value of the relationship. The value is obviously subjective and can be based on a wide set of criteria—from economic to political to social. The key to scoring the value of the relationship is determining how critical it is to you achieving your goals and objectives.

**Type:** Indicate the current status of the relationship by the following types:

- **(H) Hostile** - Antagonistic, anxious to sever the relationship.
- **(R) Reluctant** - Hesitant. Wary and/or suspicious of any engagement.
- **(T) Transactional** - Limited to a simple reciprocal exchanges.
- **(P) Preferred** - First choice. Desired over all available options.
2. Using the number that corresponds to the name, plot each relationship on the Value | Relationship Grid below. The Relationship Type plotted in the X direction. The Value (1-10) is plotted on the Y axis.

**Quadrant I**
These relationships offer little value AND they don’t like you! Get rid of them as soon as you are able.

**Quadrant II**
These relationships like you well enough, but don’t offer you much value. Be judicious in how much time and resources you spend fostering the relationship.

**Quadrant III**
These are your best and most valuable relationships. Continue to care for them in the manner you have, but understand that they are a finite resource. If QIII relations receive all your attention you will never grow.

**Quadrant IV**
These are the relationships that require a plan. They offer a lot of value, but don’t see you as irreplaceable. They can leave in an instant and never look back. Use this book and the following worksheets to develop a plan for them.
The Relationship Types described on the previous pages are broad categories of the different kinds of relationships we develop throughout our lifetime. They each fall somewhere on a spectrum from bad to good—from hostile to loyal or from hate to love—with plenty of iterations in between.

Ironically, the vast majority of our relationships hover around the middle of that spectrum. They are transactional—producing outcomes that are slightly better or slightly worse than what we expected.

We have encounters with the majority of people in our lives as they deliver our coffee, teach our kids, cut our hair, govern our communities, and run our organizations. We don’t hate them or love them, and while we may be polite in describing how much we like them, the truth is our relationship is limited to a series of interactions and exchanges. They feel safe with us and we feel safe with them.

It can be a bit discouraging (and confusing) to think that a concept as big and bold as making one’s life safer would produce nothing more than a transactional relationship. You can blame 10,000 years of social living for that. By living among strangers, humans have lowered the bar when it comes to trusting others. Most of us have learned that it is not in our best interest to lie and deceive and manipulate the people around us, so we don’t. We maintain our good standing in the community by being trustworthy. This is why we don’t need food tasters testing what we eat or suits of armor when walking down the street. Trust is a shortcut we have chosen to take.

That doesn’t mean that earning one’s trust is automatic or permanent. While we may begin from a position of trust, it can easily and quickly move to the left of the spectrum, as I have demonstrated in this book. We start by expecting the people we encounter to have the character, competency, consistency, and capacity we require. But as soon as our brains determine that they don’t, it moves the relationship to the left—toward reluctant and eventually hostile.
Preferred = Safer + Easier

To move a relationship from Transactional to Preferred you need to do more than earn their trust and keep them safe. You need to make their life easier. When evaluating your existing relationships, think about their challenges and the obstacles they face—within their organization, in their personal lives, or their interactions with you.

Here’s an everyday example. If you have done business with any online retailer you know a level of trust must be established. They need to make sure you feel safe by delivering the product you ordered within the time promised and for the cost they advertised. That is a transaction. But when that retailer offers us the opportunity to save a wish list or record our shipping addresses, it makes it easier the next time we order with them online; they’ve eliminated the burden of remembering the items we liked or always inputting shipping addresses. That’s a virtual example, but the same thing happens with person-to-person relationships, or person-to-organization relationships.

Making someone’s life easier isn’t simply about offering help. If we think more deeply about who offers us the most meaningful help, it’s less about who takes care of things we’re already paying them to take care of and more about the surprising roles they can play in our lives. A sense of belonging comes from having someone who first considers what’s making your entire life harder—beyond what you’re people are paying you to do for them or beyond an employee-employer exchange of time for money.

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<tr>
<th>Scenario</th>
<th>Safer</th>
<th>Easier</th>
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<tbody>
<tr>
<td>Financial adviser</td>
<td>Calling the client with opportunities or dangers.</td>
<td>Create online portal where clients can check the status of their investments 24/7.</td>
</tr>
<tr>
<td>Kitchen Contractor</td>
<td>Getting a kitchen project finished as quickly as possible and cleaning up afterward.</td>
<td>Give clients vouchers for dining out during construction.</td>
</tr>
<tr>
<td>Fortune 500 Company</td>
<td>Provide employees with competitive wages, opportunity for career growth and development.</td>
<td>Offer dry cleaning services, on-site day care, and flexible, work-at-home opportunities.</td>
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<tr>
<td>Brick and mortar retailer</td>
<td>Available on-site inventory with a wide variety of products, styles and sizes, along with changing rooms to try on before purchase.</td>
<td>Provide packaging and shipping services for Amazon (your competitor) to make returns easier for your customers. Save them time.</td>
</tr>
<tr>
<td>Attorney</td>
<td>Provide business with quality legal services that protect them from potential liabilities.</td>
<td>Develop &amp; host regular events for your clients and prospects with (non-legal)programs that can help their businesses succeed.</td>
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When it comes to making someone's life safer by building trust, the focus is on you. You offer safety when you match your character, competency, consistency, and capacity to someone else's standards for each of those elements. It's your responsibility to gauge and then meet or exceed their expectations. It's up to you to change yourself—your skills, training, expertise, etc.—to provide what your people need to see and believe before they can trust you.

Think about whether you live up to other people's expectations. Don't assume that you know what those are. You have to be observant. You have to make the ask. Safety and trust are about alignment. You can't do that if you're only measuring your trustworthiness by your own personal standards.

**GOALS**

TO EVOLVE AND TO ADAPT IS TO CHANGE. In nature, change is random and aimless, having no preordained "desire" or outcome. Selection occurs naturally.

While not exempt from natural selection, humans have used their rational brains to hijack the process. Our species has utilized our remarkable minds to cure diseases, produce our own foods, generate our own energy, transform our environment, even manipulate our own genetic codes. We have found ways to outsmart the evolutionary process and take control of our own destiny.

My goal for this workbook was to have you do the same with your own organization and your own careers. I want you to have the information and tools that will allow you to take control of your own destiny and develop the relationships you will need to succeed. I have shared with you the scientific evidence that supports the premise of this workbook, stories and anecdotes that offer proof of concept, and questions to consider when thinking about the most important relationships in your life. Now, it's time to put what you have learned into action. It's time to create your own plan utilizing the one strategy that has effectively guided every life form that has ever existed on this planet. Creating unbreakable bonds. Fusing permanent connections. Establishing unified networks. Building loyalty by making the lives of others Safer, Easier, and Better.

**Safer**

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Think about whether you live up to other people's expectations. Don't assume that you know what those are. You have to be observant. You have to make the ask. Safety and trust are about alignment. You can't do that if you're only measuring your trustworthiness by your own personal standards.
**Easier**

Making someone’s life easier by fostering a sense of belonging is all about them. You ease others’ burdens by offering them connection. But our minds don’t take us to the level of deep connection, a sense of belonging, if you haven’t proven to them that you understand who they really are and what they need and care about. How do you do that? You demonstrate recognition. You call them by name. You make gestures that show you’ve taken the time to pay attention to what they share with the rest of the world. You start by actively working to learn more about them.

One helpful exercise is to build a dossier for each of your most important relationships. On a superficial level, this is about things they like or are interested in. On a deeper level, it’s about paying attention to things they are afraid of and what they aspire to. That’s information you can glean from conversations with them, but it’s also something you can gather from industry trends and pressures. Understanding who they are and then looking out for potential pitfalls and acting proactively to help them shows your value. Then if you can prove that you share commonalities, that you are like them or someone worth aspiring to be like, you give them a safe place to belong.

**Better**

If safer is all about you and easier is all about them, then better is all about us. I don’t just mean them-plus-you. I mean a collective us—making someone’s life better by offering purpose is about something bigger than any one of us can accomplish or experience alone. Making tactical goals to offer a sense of purpose requires that you think critically about what you really stand for, why you’re in business in the first place, and then making sure it’s clearly articulated and acted upon in every part of your company or organization.

And you have to be careful to avoid making it exclusive. Your purpose can’t be something that you or your team creates and then announces. You have to provide opportunities for participation and fellowship. It’s not about you; it’s about us. Are you creating a clear vision? Are you ensuring that your purpose is integrated into everything you do? Do you have a process to assess purpose alignment throughout your organization? Those are the kind of questions you need to consider as you build an action plan for purpose.
www.jameskane.com

james@jameskane.com
(570) 239.1699

Facebook: jameskane.loyalty
Twitter: @james_kane
LinkedIn: jameskaneloyalty