

A ROAD-MAP TO
+ RED-CARPET
+ CUSTOMER SERVICE

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Table of Contents

EXPECT	1
Create a Strong Vision for your Customer Experience.....	1
Set and Commit to Actionable Customer Service Standards.....	6
If you Treasure It, Measure It.....	11
Lead by Example.....	15
Leadership Self-Survey: Are You Leading By Example?.....	18
EXCITE	21
Setting and Communicating Milestones	21
Communicate Your Vision and Plan the Red-Carpet Kick-Off.....	25
Rolling Out the Red-Carpet For Your Employees: Putting People First	33
ENGAGE	37
Choose your Brand Champions & Trainers.....	37
Involve Your Staff in Refining Your Vision	42
EMPOWER	51
Training Your Team.....	51
SWOT Analysis	53
SWOT Analysis Follow-Up Questions	54
Empower with Tools and Resources	56
Letting Go and Defining Boundaries	58
Rebuilding TRUST in the Workplace.....	61
ENCOURAGE	65
On-The-Spot Recognition	65
Formal On-The-Spot Recognition Idea Tied to New Expectations.....	69
Rewards and Recognition!.....	72
CHEERS for PEERS.....	78
Daily Pre-Shift Meetings	83
Consistent Creative Communication.....	85
EVALUATE	87
Inspect What You Expect: It's All About Accountability	87
Measuring Results	92
EXTEND	95

Introduction

Congratulations on your decision to embark on the journey to improve the customer experience! When you focus on your team members and your customers you'll start to see your referrals, rave reviews and sales improve as well! This Road-Map to Red-Carpet Service is your guide to leading the culture change you are seeking.

If you're working with Red-Carpet Learning Systems (and we hope you are!) you will have a Red-Carpet Master Trainer who is guiding you through the following steps. We have a seven step process that ensures this initiative will become your "new way of doing things" and not the "flavor of the year!"

EXPECT

EXCITE

ENGAGE

EMPOWER

ENCOURAGE

EVALUATE

EXTEND

You'll also use this guide to keep the momentum going and continue to raise the bar on the service experience long after your Red-Carpet Master Trainer has left the building. Why wait? Let's get started on your journey down the road to Red-Carpet Customer Service.

Warmly,

Donna Cutting, CSP

Founder & CEO

Red-Carpet Learning Systems

About the Authors

Donna Cutting, CSP is the Founder and CEO of Red-Carpet Learning Systems, a consulting firm based in Asheville, NC which helps leaders nation-wide engage their team members to improve the customer experience. She's the author of "The Celebrity Experience: Insider Secrets to Delivering Red-Carpet Customer Service." Donna is an in-demand keynote speaker on the topics of employee engagement and customer experience, and has worked with many organizations to help them roll out successful customer service culture change efforts resulting in sales and better happiness scores.

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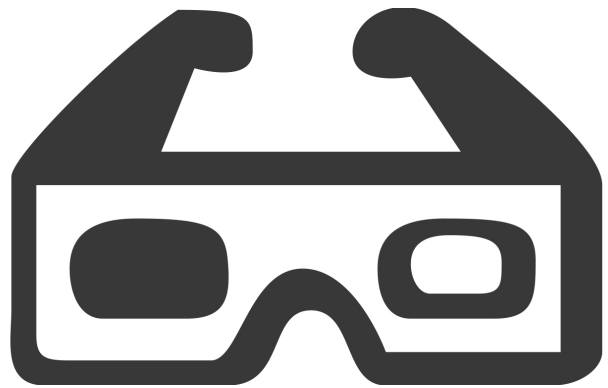
EXPECT

Create a Strong Vision for your Customer Experience

Companies that are known for delivering red-carpet customer service have leaders at the helm who create and communicate a strong vision for their ultimate customer experience. This is not a vision statement, but rather a detailed picture of what you want your employee and customer experience to look like when this “project” is truly integrated into your organizational culture.

A few things to keep in mind:

- Create a vision that is just a little beyond what believe you can achieve. As someone once said “Shoot for the Moon. You might just land among the Stars.”
- Write in present tense, as though you’ve already achieved it.
- Let it be strong, clear and filled with imagery so you can really feel and almost “taste” what it will be like when you achieve this vision.
- Be sure it is in alignment with your organizational values
- Involve team members at every level in creating your vision. However, remember that this is your leadership vision for service. You, the leadership, must want to achieve it and believe you can reach these goals if you work for them. We’ll talk more about involving your team members in future modules.
- Spend time on it – but don’t fret about perfect wording, etc. Leaders can spend weeks and months in rooms arguing over every word. In this case, done is better than perfect.



ROAD-MAP TO RED-CARPET SERVICE

- Once you have a strong, clear and detailed picture of where you're headed, every leader should post it somewhere it's visible to guide you as you make decisions. Ask yourself with each decision "will this choice move us away from our vision or closer to it?"
- You should allow at least one complete hour for the first part of this activity.

Creating a vision of the employee and service experience is the first step in engaging your team members to raise the bar; it also will act as clear ongoing direction – providing the answer to "what's next?" as you continue on your journey.

Use the steps in this Road-Map to Red-Carpet Service and you'll look back in 3 years and be able to celebrate how much or all of your vision has become *just the way you do things*.

Questions for Discussion

Gather in a room as a group with a facilitator. (This can be one member of the group or an outside person, such as a Red-Carpet Master Trainer) Your group can consist of people at every level of the organization. However, ensure that your top leadership participates. (CEO, COO, VP's, RDO's, ED's and Department Heads) This is the vision you will use to lead the troops – so as leaders, you need to first create something you can believe it.

Before you begin "dreaming up" your new way of being, consider the answers to the following questions:

- What do your customers really want? Residents? Family Members? Referral Sources? Employees? Etc.
- What makes them happy? What makes them unhappy?
- What phrases or concepts might motivate your employees?

At this point the facilitator should supply pens and paper or index cards. Have everyone close their eyes as you read the following:

Imagine that it's three years from now and we are receiving an award for the strides we've made in providing an extraordinary experience for our customers and team members. We're being interviewed for an article that will be featured in the next publication of the association giving you the award. The interviewer is asking us a series of questions. As she asks, keep your eyes close and silently think through your answers to her questions, dreaming about what it COULD look like 3 years from now. The sky is the limit. Remember to answer her questions as if it were already consistently happening this way.



- *What is the most important change you've made to your customer experience in the last three years?*
- *As a result, what have you become known for? What have your customers come to expect from you?*
- *What are your customers saying about your company?*
- *What does it feel like when you enter your property? What does it look like? What does it smell like? What does it sound like? What does it taste like?*
- *What customer service basics are happening consistently that weren't happening as consistently before your effort towards raising the bar?*
- *What is a specific example of how your service experience is better than it was before?*

Open your eyes. Now take a few minutes to write down everything you can remember.

Give everyone enough time to write and then ask them to close their eyes again and think about their answers to the following questions. Remember, you're dreaming 3 years into the future.

ROAD-MAP TO RED-CARPET SERVICE

- *How do your team members function differently now than they did three years ago?*
- *What kinds of verbatim comments are you seeing on employee happiness surveys?*
- *What evidence is there to let you know your team is 100% on board and committed to continuous improvement?*
- *What visible examples do you see of engaged employees?*
- *What kind of people are in your cast of employees?*
- *How do you as Leaders of the organization Lead by Example?*

Open your eyes. Now take few minutes to write down everything you can remember.

Give everyone time to write down their thoughts. Then ask them to close their eyes one last time and dream up their answers to the following questions.

- *What results have you enjoyed as a result of your focus on the customer experience?*
- *What challenges have you faced and overcome?*
- *What milestones have you celebrated reaching? Small wins and Big wins?*
- *Now that you've achieved all that, what's next?*

Open your eyes. Write down what you remember.

Now, go around the room and have people share what came up for them. You may want to capture ideas on a flip chart. Let people share their ideas freely – reminding everyone that this is not a time to decide the logistics – it's just about creating what you want to see, in advance of figuring out how to make it happen.

Collect all the cards for processing and thank everyone for their contribution.

Next ACTION Steps:

- Once you have the larger group's input, have a smaller group go through all the information that was collected.
- Clean it up and combine redundancies. Type up all the key phrases that make up your vision and put on one piece of paper. Rewrite them, keeping the essence, but using words that will inspire the rest of your team.
- Stay away from vague motivational phrases such as “strive for the best” or “excellence is our motto.” Make your vision tangible. For instance, “we are known by customers and colleagues as the best retirement community in the Midwest” or “We embrace excellence through continuous learning.”
- If a word or phrase really jumps out at you as the perfect “core message” to inspire your team. For instance, one RCLS client chose “We have a Waiting List to Work, and a Waiting List to Live.” That was theirs – see what jumps off your page to come up with yours.
- Start discussion how you might creatively communicate this new vision to your team members as we move towards your Kick-off.



Set and Commit to Actionable Customer Service Standards

You now have this beautiful vision of customer service excellence to aspire to, and it is filled with motivational phrases to inspire your team members. Wonderful! Now it's time to give it some legs.

It's time to create a list of specific *action-oriented* behaviors that make up excellent customer service in your company. The key here is to make them tangible. For instance, "we are friendly and welcoming" is a great value. However, if your definition of friendly and welcoming is different than that of your front desk receptionist' you can't ensure they are expressing that value in the way you expect.

However, if you define friendly and welcoming as:

- Smile
- Look people in the eyes
- Call them by name
- Wish them well on their way
- Invite them back

Then, you have a common definition of friendly and welcoming.

If Red-Carpet Learning Systems is working with you to help you through this process, your lead consultant will have helped you with this. If that is the case, write your customer service basics in here:



These basics are to become the common language your team members use to define exceptional service and understand exactly what's expected of them.

If you are doing this work on your own, here are some examples of service basics other organizations have used:

• Anticipate their Needs	• Speak First and Last
• Discover and Delight	• Remember to WOW
• Immediately Assist and Go the Extra Mile	• Follow Through and Follow Up
• Provide an Immediate Greeting	• Own the Issue and Offer Assistance
• Send them Home with a Smile & Invite Them Back	• Smile, Look them in the Eye, and Call them By Name
• Personalize, Surprise & Delight	• Know Your Stuff

You might also like to arrange them around a specific word to use as an anchor and make them memorable. For instance, our off-the-shelf training teaches people to treat their customers as **STARS**:

Smile, Look 'Em In the Eyes, & Call Them By Name

Take Responsibility from Start to Finish

Anticipate Customer Needs

Remember to WOW!

Seal it Smile and a Thank You

ROAD-MAP TO RED-CARPET SERVICE

Understand that these are to become *expected behaviors* of everyone who works for your company – team members at all levels. Which means, you must *lead by example* (*to be elaborated on later in this manual*) as well as include these behaviors in all job descriptions and employee evaluations.

Can you hold people accountable to these types of customer service basics? Yes, if the following criteria are met:

- ✓ The expectations must be in each job description
- ✓ They must be included in formal evaluations
- ✓ You must have documented proof that you coached the employee to improve the behavior

So be sure you are ready to commit whole-heartedly to the service basics you define – as these will be the foundation for your customer service success!

Questions for Discussion:

If the team at RCLS has not helped you define these basics yet, discuss the following:

1. What are the basic service behaviors we want our employees to exhibit on a daily basis?
2. How are these applicable to all departments?
3. Is there a word or phrase we could use to *anchor* the basics in the minds of our team members?
4. Or would we prefer just a simple list?
5. How willing are we, as a leadership team, to consistently adhere to these standards?

If you are working with a RCLS Master Trainer, you probably already have these basics in place. In that case, discuss the following:

1. How do our new service basics apply to each department? Each job function? (Do we smile when we're talking on the phone? Do our emails need to include friendlier greetings? Do we need to pro-actively offer assistance to our co-workers in a specific department?)
2. How consistently are we adhering to these basics?
3. Have we included our new service basics in our written job descriptions and performance reviews?
4. Are there other standards we want to implement? (Dress code; specific phone greeting; etc.)

Next ACTION Step:

If you are not currently working with an RCLS Master Trainer:

- Consider having Red-Carpet Learning Systems help you with this process. You can find us at www.redcarpetlearning.com.
- Narrow your service basics down to 7 -10 behavioral expectations and put them in a format that will be memorable for your team members.

If you have been working with a RCLS Master Trainer:

- Congratulations! You are some smart cookies. 😊
- Begin the process of inserting your service standards into job descriptions and performance reviews.

ROAD-MAP TO RED-CARPET SERVICE

- Department Heads take some time to get clear about how each standard is implemented within your departments. Remember, for non-customer-facing employees, co-workers are customers too.
- Begin deciding on other service standards (dress code; telephone greetings; details that are specific to each department). Create a timeline for implementation and inclusion in your Policy and Procedures manual.

Now that you have your new service basics, it's time to measure your starting point so you clearly understand the gap between where you are now and where you want to go.



If you Treasure It, Measure It

It's easy to fool yourself into believing your current customer service levels are cannot be surpassed! We hear this all the time. "We like to believe that we give excellent customer service." Maybe. Keep in mind, though, the customer experience you deliver is only as good as your least engaged employee. Each team member your customer meets adds to or subtracts from the experience they have with your organization.

Stop the guessing games and determine exactly what your customers are thinking. It's time to get some baseline measurements related to your expected outcomes and service basics so you'll have something to celebrate when the numbers improve!

There are a variety of ways to measure your customer service culture change success. For instance, you could measure:

- Customer Happiness based on specific expected behaviors
- Customer Happiness after Move-In
- Dining Room Customer Happiness
- Customer Happiness related to specific departments
- Increase in Referrals
- Increase in Tour to Close Ratio
- Increase in Occupancy
- Increase of unsolicited positive comment cards – or positive comments on a call-in line
- Increase in Employee Happiness
- Increase in Leadership Effectiveness



Measuring success is an ongoing process as is culture change. RCLS recommends you start with a simple baseline measurement of no more than 3 items. This will give us results to shoot for and milestones to celebrate with your team.

ROAD-MAP TO RED-CARPET SERVICE

Here's an example of what one of our clients did to measure the success of the customer service training.

They took a 2 week period and handed cards out after every guest, resident, family member, and prospective employee transaction. The cards had 7 questions on a simple 5 point scale related to the service behaviors we trained. In some instances the questions were sent in an online survey (for example, after a phone transaction.)

Here were the questions they used, based on the specific behaviors we trained:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Overall, how would you rate the hospitality of our staff? (Friendliness, courtesy, responsiveness)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall, how would you rate the professional attire of our staff?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When given the opportunity did our staff members call you by your name?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall, did our staff members seem attentive to our residents?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall, did the staff members you encountered meet you with eye contact, a smile and a friendly greeting? (You could use this in place of the first question.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How satisfied are you with the way our staff members solved your most recent problem?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall, did our staff delight you?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Additional Comments:					
Do you have any feedback on any particular staff members?					
Which departments did you interact with while you were at our property?					
<div> <input type="radio"/> Sales and Marketing <input type="radio"/> Front Desk Concierge </div> <div> <input type="radio"/> Nursing <input type="radio"/> Housekeeping </div> <div> <input type="radio"/> Dining <input type="radio"/> Don't Know </div> <div> <input type="radio"/> Other _____ </div>					

Other ways to measure, include:

- Sales data you already have (Tour to Close ratio, etc.)
- Customer Service Investigations (Mystery Shops)
- Post-tour follow-up calls
- 360° feedback for leadership

Again, for now keep it simple. Consider the comment cards for a 2-3 week period (described above) that have questions tied specifically to your service basics. Then choose 2 other ways to measure your overall success.

As the saying goes, if you treasure it – measure it! So let's get started.

Questions for Discussion:

1. What measurable results will show us that we're making progress on this journey?
2. Which 3 ways can we determine a baseline measurement?
3. What information do we already have? (For instance, you may already know your tour to close ratio or your # of referrals. Note: while your annual lengthy customer service survey results can also be counted as a baseline, I wouldn't rely on them to the exclusion of an immediate short and short-termed survey tied specifically into your service basics.)
4. What questions shall we include in our survey that will show us if our employees have improved on demonstrating the service basics?
5. How will we communicate the starting point to our team members?

Next ACTION Steps:

- ☐ Work with your RCLS Master Trainer to determine the top 3 baseline measurements you want to capture.
- ☐ Gather the information you already have in place.
- ☐ Work with your RCLS Master Trainer to decide on questions tied to your service basics and a method of surveying your customers.
- ☐ Once implemented, take a look at your results and decide on specific improvements you like to see. (For instance, on a 5 point scale – if you're at 70% good and 30% excellent, you might shoot for a 10% increase 6 months after training.)
- ☐ Start the discussion of what it's really going to take to get the results you seek. (For instance, if it's an increase in referrals – start by increasing the number of times you ask for referrals.)

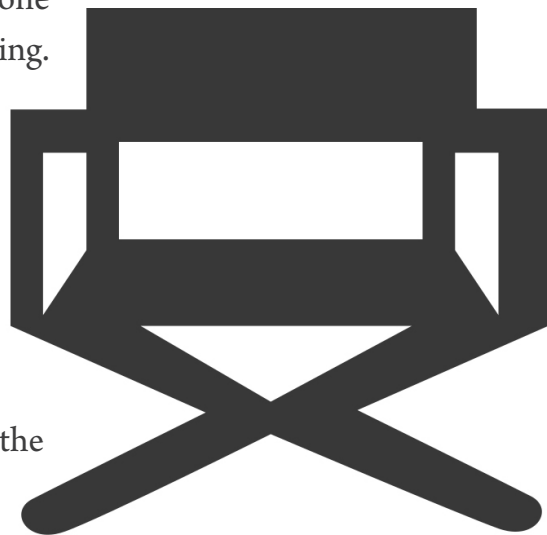
Now you have your starting point ~ if you are diligent in your implementation, you'll be surprised at quickly you begin to reach some milestones.



Lead by Example

You're almost ready to premiere your new vision for a red-carpet customer service culture. However, there is one more critical step to take before you kick-off your training. It's time to do an inventory and ask yourselves, "Are we leading by example?"

At this point you may be nodding your heads and thinking "Of course we do!" Well, true. You wouldn't be embarking on this journey if you didn't understand the need for a certain level of hospitality and good service. Yet, when juggling multiple priorities, even the best leaders can forget the basics.



The hard truth is that if you want your team members to roll out the red-carpet for your customers you need to do a little red-carpet rolling of your own. Walk your talk and your team members will follow suit. Expect them to do as you say and not as you do and you will be sorely disappointed in your results.

Make no mistake, once you roll out your new expectations your team members will be watching you closely to see if you are adhering to them as well.

Here are some ways you can ensure you are Leading by Example:

Be a Team Player: You should be willing to do anything you ask your team members to do. Yes, there are times when you must simply be the boss. But when things get busy, employees respect a leader who will jump in and help out on the front lines. Let your team see you out on the floor when they really need you, and you'll be a leader they want to follow.

Stay Positive in Front of Your Team: A leader who rolls her eyes and complains to her team, "Oh this is just another silly initiative the corporate office wants us to do" is setting the stage for failure. If you have concerns about something your home office team wants you to do,

ROAD-MAP TO RED-CARPET SERVICE

take it up with them in using the proper channels. In front of your team, however, you are their representative and should be showing nothing but support and 100% enthusiasm.

Back to Basics: When you come in every morning, smile and share pleasantries with your team. Ask about their evening. Show an interest. Know their names and use them. Keep the promises you make and thank them regularly. It's unfortunately not unusual for a Red-Carpet Master Trainer to hear a team member say, "Why should I smile? My boss walks right by me every day and doesn't bother to smile at me." A red-carpet leader will be more aware of showing some hospitality to the team on a daily basis.

Just a note: It's been our experience that many leaders think they are showing hospitality to their team members more than they actually are. It might be implement a 360° survey to have employees rate their bosses for measurable baseline feedback. (RCLS can help you with this). Either way, you could make a commitment to be more conscious of being more outwardly caring from this point forward. It may feel phony or uncomfortable at first, but soon it will become second nature and your employees will take notice.

Questions for Discussion:

1. As a leadership team, how well are we leading by example?
2. How willing are we to get vulnerable and acknowledge our imperfections?
3. How willing are we to change some of our own behaviors in this process?
4. What behaviors should we keep?
5. What behaviors should we change or improve on?
6. What are 5 specific ways we commit to Lead by Example from this point forward?

Next ACTION Steps:

- ☐ Talk to your Red-Carpet Master Trainer about implementing 360° feedback surveys for leadership.
- ☐ Decide on 5 specific ways you will commit to Lead by Example. Sign a commitment pledge and check-in regularly to see how this is going.
- ☐ Get real honest with yourself and complete the following self-survey.



Leadership Self-Survey: Are You Leading By Example?

Carefully and honestly answer each question, rating yourself on a scale of 1 to 5.

	1 Never	2 When I feel like it	3 Yes, but inconsistently	4 Most of the time	5 Always, without fail!
I proactively smile and greet team members when I see them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I proactively smile and greet customers when I see them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I know and use the names of all my team members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I proactively discover the names of customers and use them regularly.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I give my team members 100% of my attention when they come to me with questions and concerns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have an "all hands on deck" philosophy and jump in wherever I'm needed. I can often be seen on the floor helping my team.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I keep 100% of the promises I make.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am always on time and intentional with performance reviews.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I only speak in positive terms about the company when I am in front of my team.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I carefully consider how to communicate company decisions to my team members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I strive to find truthful, positive comments I can make about each of my team members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	1 Never	2 When I feel like it	3 Yes, but inconsistently	4 Most of the time	5 Always, without fail!
I keep kindness as a priority whenever communicating with team members and customers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I always communicate the reasons behind changes or requests.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When I make a mistake, I admit it and take responsibility.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I intentionally strive to turn disgruntled customers into happy customers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I actively work to ensure my team and I provide flawless service.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I regularly praise the efforts of my team members and work to personalize the recognition.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There are several examples others' could tell of how I have WOW'd a customer.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I share stories of how my team members have WOW'd customers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My team members regularly get praised by customers and other leaders.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Now you should have a good idea of where you need to grow as a leader. Take a look at places where you rated yourself lower than a five. Which of these behaviors would your team members most notice and appreciate if you changed it? Start with that one of these areas and work on it until it becomes a regular part of your routine. Then, move on to another. You're on your way to growing as a LEADER!