Mobilize Strategy Worksheet

Background on your business and programs

What is your company's mission?

_____
_____
_____
_____

Why are you building your professional network?

_____
_____
_____
_____

What are the business goals that inspired you to create your network?

Our company objectives for the year include:

- _____
- _____
- _____
- _____
- _____

What are one or a few top-level business metrics (eg. churn, conversions) that you are already measuring, which you want to look back on over the course of your network's growth?

- _____
- _____
- _____

Now, track these metrics over time:

_____

Metric #1: _____
- March:_____
- June: _____
- September:_____
- End of Year: _____

Who are your members?

Who are your network members? Define the types of companies and/or individuals that will be in your network. Notice the types of roles, values, and demographic data that your customers will represent.

Tip: Think about the different motivations of your members. Consider things like career experience level, life goals, etc.

Individuals' roles:	Individuals' values:
Demographic data:	Types of companies:
[fill in the blank]:	[fill in the blank]:

What's in it for the members?

What value do members get from being in this network and why will they return? Put yourself in your members' shoes and define these pieces of value one by one.

Tip: Remember, sometimes what matters to the organization differs from what matters to members. Prioritize what your members value as you build your strategy.

What's in it for the members?

- _____
- _____
- _____
- _____
- _____

Now, define what's in it for the members as a statement of short term and long term value. Your members will come to your community for something in the short term, and they'll stay in your community for something in the long term:

Come for the_____
Stay for the _____

Network goal statement

What is the goal of your network? In other words, the network's purpose, your raison d'etre?

Tip: Ensure your network's goal clearly connects to your organization's goal. Create a goal that is simple, direct, and gets to the point.

_____
_____
_____
_____

This network is

Clarify the purpose that your network serves. Define what your network is here to do and the types of discussions you expect members to have.

Tip: Avoid committing to too many purposes and don't bite off more than you can chew.

This network is:
This network is a place where:
This network is a place to discuss:

This network is not

Clearly spell out what you do not want this network to be. Acknowledge the goals you are not going after at this stage.

Tip: This list will help you communicate with your colleagues and your members about the direction of your program. Remember,

you can still add additional goals to your long term vision (up next).

This network is <u>not</u>:
This network is <u>not</u> a place where:
This network is <u>not</u> a place to discuss:

Vision

While your network's goal statement indicates your primary purpose, your vision statement paints a picture of your future. Create a vision that will serve as the north star for your network. Consider the ways that your network and its purpose will expand over time.

Specifically, imagine your community in one year and three years.

Tip: Your vision for years one and three is meant to act as a guiding light. We expect that strategies will change over time, but it is important to have a north star that you can revisit to help you gut-check what you're doing and why.
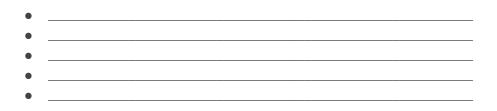
One year

_____
_____
_____
_____

Three years

_____
_____
_____
_____

Intended business outcomes

Now that you have a clear vision for your community, it's time to get clear on your business outcomes.

Tip: This is your opportunity to clearly connect program success to business results. Example outcomes may include, building customer loyalty, converting prospects to customers, and more.

What are you hoping to achieve for your business by building this network?

- _____
- _____
- _____
- _____
- _____

Success metrics for [end of year]

Connect your success metrics to the top-level business metrics that you'll be monitoring as your community grows over time (from the background section above).

Tip: It can be helpful to select metrics that push you to challenge yourself. That said, it takes six months to one year for a network to establish itself, so set metrics goals that account for your network's growth stage.

What quantitative metrics will you use to measure your success?

- _____
- _____
- _____
- _____
- _____