

The WHY Stack

Use this worksheet to define the frustrations and “pain points” your customers have as related to your product/service, then define what they really want — typically the exact opposite of their frustration. Finish by stating consequences when no action is taken, and desired outcomes when done right.

Frustration 1

Want 1

Frustration 2

Want 2

Frustration 3

Want 3

Consequences of no action taken

Outcomes when done right

Key Initiatives (WHAT)

Use this worksheet to clearly state in broad terms WHAT needs to happen to get desired outcomes. Initiatives are not specific tasks but longer term projects that will lead the business to the desired outcomes. Revise every 90 days or as needed.

Key Initiative 1

Key Initiative 2

Key Initiative 3

Action Plan (HOW)

For each key initiative list 3-5 action items that need to occur

State each action clearly and list the person responsible as well as a target completion date

Action Steps for Key Initiative 1

Target date

- 1.
- 2.
- 3.
- 4.
- 5.

Action Steps for Key Initiative 2

Target date

- 1.
- 2.
- 3.
- 4.
- 5.

Action Steps for Key Initiative 3

Target date

- 1.
- 2.
- 3.
- 4.
- 5.