

Creating Trust, Loyalty, & Shared Values with your Clients

The logo for TruGrowth Consulting features a large, semi-transparent olive-green circle on the left side. The text "TruGrowth" is written in a large, light-colored, sans-serif font across the top of the circle. Below it, the word "Consulting" is written in a smaller, similar font. At the bottom of the circle, the tagline "Creating INFINITE Advisory Firms" is written in an even smaller font, with "INFINITE" in all caps.

TruGrowth
Consulting
Creating INFINITE Advisory Firms

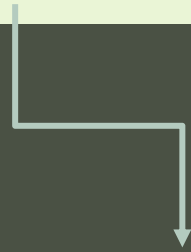
Leadership | Advice Delivery | People

Trust

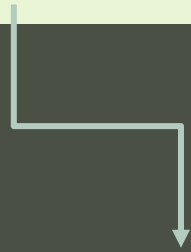


Loyalty

Shared Values



- Unwavering Credibility
- Risk Reduction
- Solid Relationships
- Open Communication
- Brand Advocacy
- Resilience to Challenges
- Differentiation



- Repeat Business
- Client Lifetime Value
- Stability during Volatility
- Cross-Selling and Upselling
- Referrals & Recommendations
- Less Price Sensitivity
- Emotional Connection



- Unbreakable Connection
- Cohesive Brand Identity
- Infinitely Committed
- Community Building
- Positive Reputation
- Ethical Conduct
- Sustainability

It Matters to Your Clients, People, & Growth

64%

of consumers say shared values help create a stronger connection with companies

91%

of consumers are likely to switch to a brand that supports a cause they believe in

72%

of consumers recommend brands that demonstrate a purpose beyond profit



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64%

of consumers say shared values help create a stronger connection with companies

65%

Increase in employee productivity if clear mission statement

91%

of consumers are likely to switch to a brand that supports a cause they believe in

81%

of employees are more motivated to work for a company with a clear mission

92%

of executives believe that a well-defined mission statement leads to better decision-making

72%

of consumers recommend brands that demonstrate a purpose beyond profit

58%

of employees are willing to take a pay cut to work for a company with a mission they believe in

30%

Higher employee retention rates of Companies with a strong mission



It Matters to Your Clients, People, & Growth

64%

of consumers say shared values help create a stronger connection with companies

65%

Increase in employee productivity if clear mission statement

79%

of CEOs believe that having a strong purpose improves financial performance

91%

of consumers are likely to switch to a brand that supports a cause they believe in

2.3x

higher growth rate of Companies with a clear mission statement

81%

of employees are more motivated to work for a company with a clear mission

92%

of executives believe that a well-defined mission statement leads to better decision-making

10:1

Performance of Businesses with a strong mission vs their competitors

82%

of Investors are more likely to invest in companies with a strong mission statement

72%

of consumers recommend brands that demonstrate a purpose beyond profit

58%

of employees are willing to take a pay cut to work for a company with a mission they believe in

8x

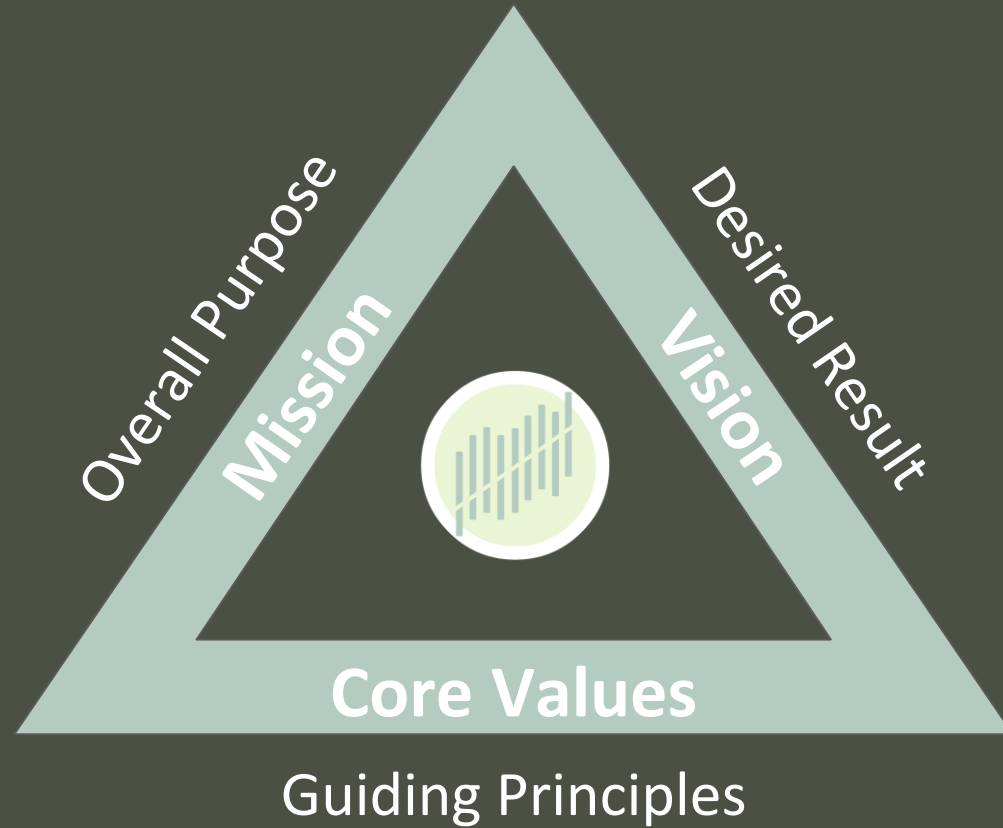
Outperformance of Companies with a compelling mission against the S&P 500 over a 20-year period

30%

Higher employee retention rates of Companies with a strong mission



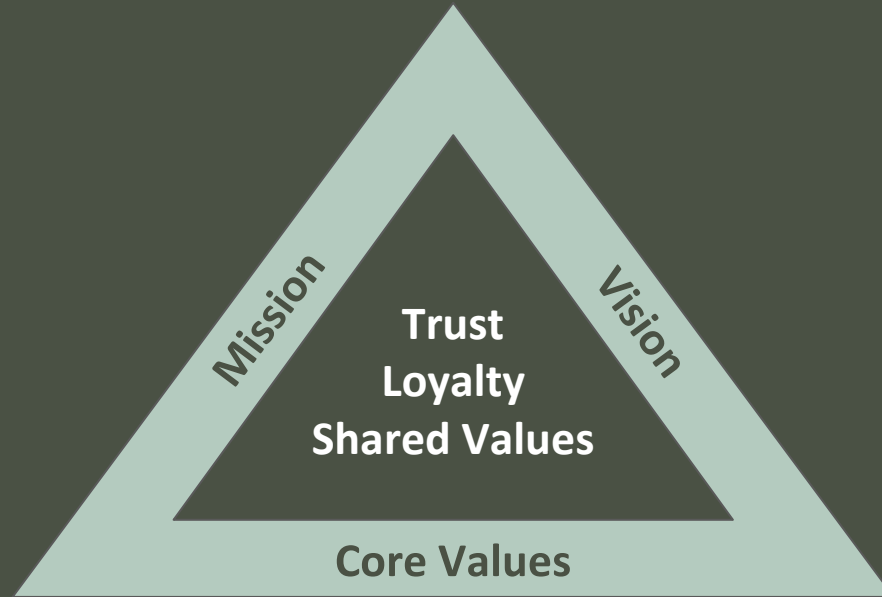
The Foundational Triangle



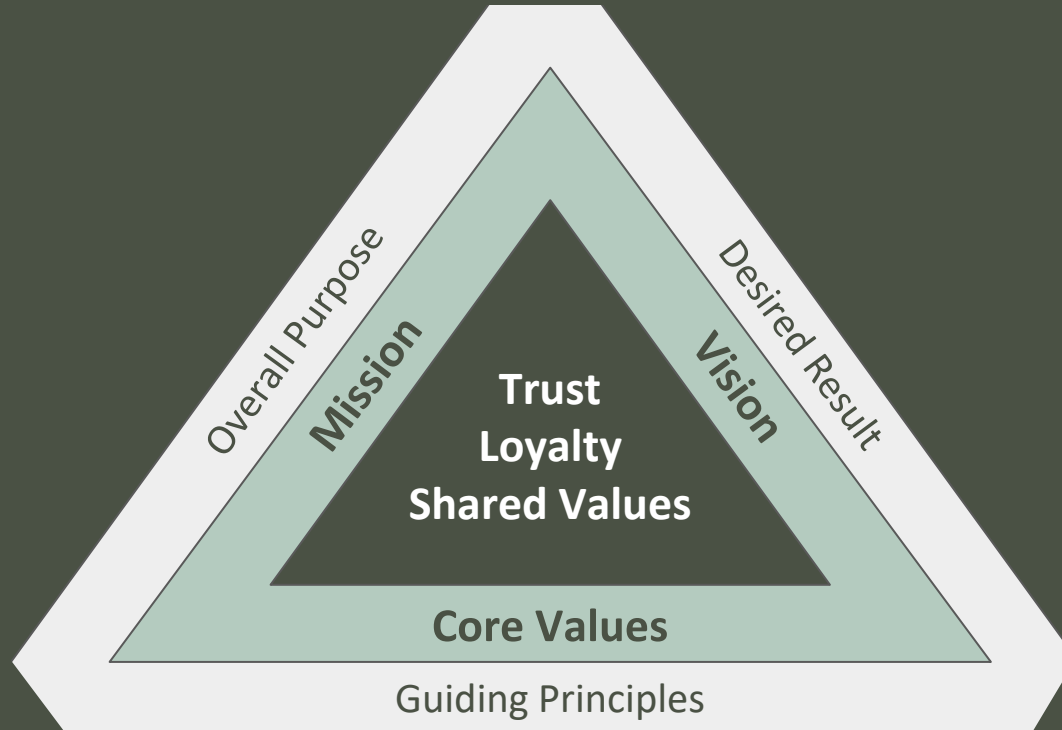
The Foundational Triangle

Trust
Loyalty
Shared Values

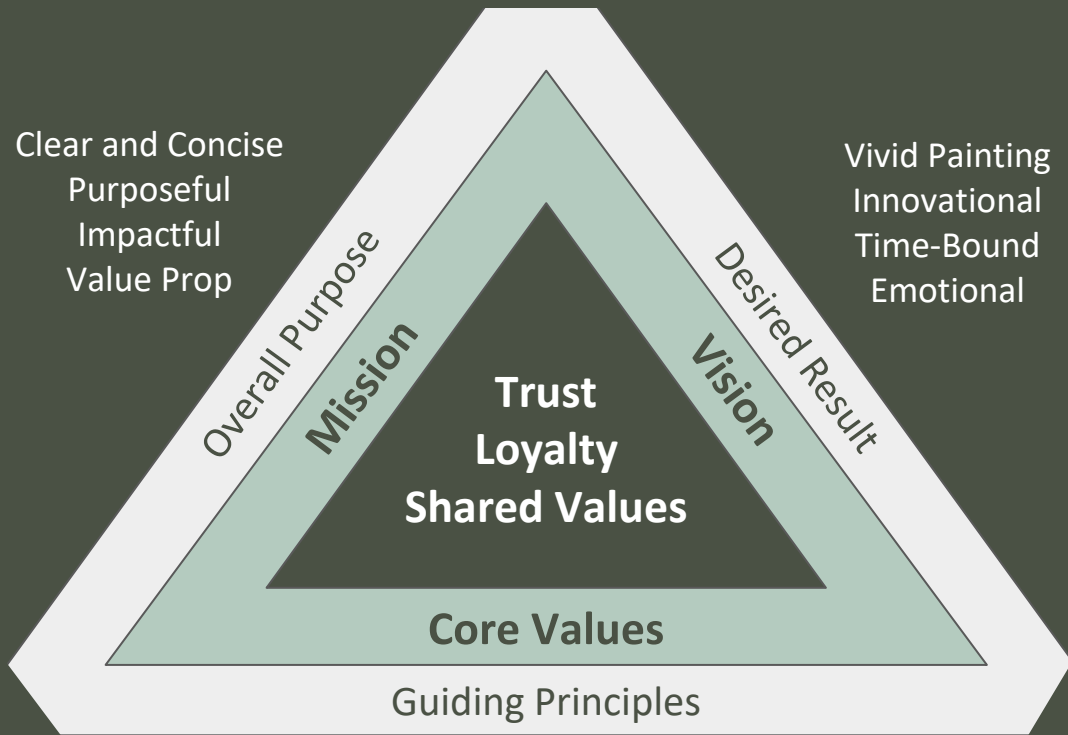
The Foundational Triangle



The Foundational Triangle



The Foundational Triangle



The Foundational Triangle

How to Fail!

Overpromise
Buzzword Laden
Built Around Fads
Vague & Generic
Unrealistic

Static
Complicated
Overcrowded
Contradicts
Compromises

The Foundational Triangle

How to Fail!

Overpromise	Static
Buzzword Laden	Complicated
Built Around Fads	Overcrowded
Vague & Generic	Contradicts
Unrealistic	Compromises

Avoid These

- To be the best company...
- To make money selling...
- To be industry leading...
- Provide Top-Notch...
- To be the biggest...
- To make a positive impact...
- To exceed customer expectations

Foundational Steps to Success

Step 1

Draft Core Values:

Assignment: 10-15 Values with one line definition

Tips:

1. Think Guardrails!
2. Think non-negotiable
3. Idea trumps reality
4. Concept over words
5. Test competition

Step 2

Draft Mission Statement:

Assignment: 3 paragraphs of who we are, what we do, who we do it for, why it matters

Tips:

1. Think Broad!
2. Nail the purpose
3. Focus on purpose
4. Dowse with Values

Step 3

Draft Vision Statement:

Assignment: 1 paragraph that paints the future of your firm

Tips:

1. Think Big!
2. Nail the impact
3. Focus on authenticity
4. Dowse with emotion

Step 4

Finalize the Foundation

1. Core Values (4-7)
2. Mission (3-4 lines)
3. Vision (1-2 lines)
4. Repeat often

Tips:

1. Be Specific
2. Like looking in a mirror
3. Rules out competition
4. Inspires everyone

Step 5

Integrate into Firm

1. Website/Marketing
2. Physical office
3. Ideal Client Personas
4. Sales/onboarding
5. Process/Procedures
6. Culture
7. Service Model
8. Performance reviews
9. Decision-making
10. Training/Develop

What it looks like when you are doing it right!

Mission

Clear and Concise
Purposeful
Impactful
Yells the Value Prop

Vision

Vivid Painting
Eye on Innovation
Time-Bound
Engage Emotions

Core Values

Authentic
Actionable
Relevant
Memorable

How to Fail!

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Static
Complicated
Overcrowded
Contradicts Actions
Allows Compromises



Foundational Steps to Success

Books to Get You Started

Built to Last: Successful Habits of Visionary Companies

by Jim Collins and Jerry I. Porras

Factors that contribute to long-term business success. Visionary companies have a strong sense of purpose and core values, and they maintain those values even as they change and grow.

Good to Great: Why Some Companies Make the Leap... and Others Don't

by Jim Collins

Characteristics of companies that make the leap from good to great. These companies have a clear and compelling mission, and they get and keep the right people on the bus.

Start with Why: How Great Leaders Inspire Everyone to Take Action

by Simon Sinek

Importance of communicating your company's purpose to inspire people. People are motivated to buy from and work for companies they believe in, and you communicate your company's purpose starting with why.

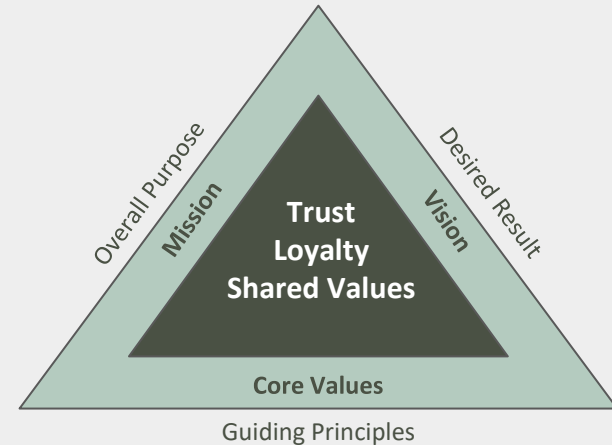
The Culture Code: The Secrets of Highly Successful Groups

by Daniel Coyle

Secrets of highly successful groups. They have a strong sense of purpose, communicate and collaborate effectively, and learn and adapt to change quickly.

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Thank you for your attention!

Download the Tools



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