

Frontline Insight Program Worksheet

Phase 1: Initial Consultation & Discovery (1–2 Weeks)

1. Business Review Questions:

- **What are the current pain points in the business?**
 - (List any operational, financial, cultural, or customer experience challenges)
- **What are your current business goals?**
 - (Write down the short-term and long-term goals for the business)
- **What are your key performance indicators (KPIs) right now?**
 - (Include sales, customer satisfaction, employee productivity, etc.)

2. Preliminary Data Review:

- **Sales Data Review:**
 - (Provide insights into current sales performance, including trends, top-selling products, and weak spots)
- **Customer Feedback:**
 - (Share recent feedback from customers, reviews, surveys, or social media)
- **Financial Snapshot:**
 - (Provide the last quarter's financial performance and identify any areas of concern)

Phase 2: Frontline Immersion & Shadowing (3–5 Months)

3. Departmental Mapping and Immersion Preparation:

- **List departments or areas for immersion:**
 - (Specify the key departments that will be observed or shadowed – Sales, Marketing, Customer Service, etc.)
- **Goals for Frontline Immersion:**
 - (What do you want to achieve from this phase? Better customer interaction, identifying inefficiencies, improving communication, etc.)
- **Key Observations:**
 - (Note down what areas should be prioritized during the shadowing process, and any operational concerns to look for)

Phase 3: Analysis & Reporting (2-3 Weeks)

4. Key Areas of Focus:

- **Operational Inefficiencies:**
 - (List current challenges such as slow workflows, outdated systems, etc.)
- **Customer Experience Challenges:**
 - (Identify areas where the customer experience could be improved)
- **Employee & Leadership Feedback:**
 - (Capture feedback or concerns from team members or managers)

5. Initial Recommendations:

- Based on observations so far, write down any **quick wins** or **immediate actions** that can be implemented to improve efficiency or culture.

Phase 4: Implementation Support (Optional Add-On)

6. Post-Report Action Plan:

- **Implementation Timeline:**
 - (Write out a timeline for when changes will be made. Include short-term improvements and long-term adjustments.)
- **Project Management Checklist:**
 - (List key actions that need to be managed, such as process changes, team training, or new system implementation.)

7. Employee Training & Coaching:

- **Employee Training Needs:**
 - (Note down which departments or roles require training, and what kind of coaching is needed.)
- **Leadership Training Goals:**
 - (Outline the leadership goals based on the feedback and insights from frontline immersion.)

Ongoing Consultation / Monthly Check-Ins (Post-Implementation Support)

8. Monthly Review:

- **Progress Tracking:**
 - (Track the progress of changes and their impact on KPIs or other performance metrics.)
- **Employee & Leadership Engagement:**
 - (How are employees reacting to the changes? Is there any new feedback from leadership on progress?)
- **Adjustments:**

- (Have any issues emerged since implementation? What can be adjusted?)

Program Reflection

9. After Completion:

- **What immediate results have you seen from the program?**
 - (Record any noticeable improvements in operations, employee engagement, or customer satisfaction.)
- **What long-term goals have you set for the business post-program?**
 - (Discuss any new goals or strategic directions that have emerged.)
- **Next Steps:**
 - (If applicable, write out any ongoing actions or programs you plan to implement with or without the consultant.)

Customizing the Program for Your Business

Based on the size of your business, industry, and specific challenges, please fill out the following:

10. Business Size:

- (Number of employees, business locations, revenue range)

11. Areas of Concern or Focus:

- (Specify which areas of your business need the most attention: Operations, Customer Experience, Leadership, etc.)

12. Desired Outcomes from the Program:

- (What are your primary objectives for the program? Recovery, scaling, culture change, etc.)

13. Optional Add-Ons (For Consideration):

- **Exit Strategy Coaching:** (Yes/No)
- **Brand Refresh Package:** (Yes/No)
- **Ongoing Mentorship:** (Yes/No)