

PICK YOUR ENGINE 1 QUICK BET

Use the strategy levers below to find one small, quick bet that needs capital or funds.

Today: Circle or Check ONE strategy total - the small, quick bet you want capital / funds for. *After today, you can revisit this sheet to circle more and discuss with your team.*

BUSINESS: current customers + current business lines

CUSTOMERS

- ☐ **Reach More Similar Customers:** via marketing or sales, reach more of your customer base.
- ☐ **Improve Customer Retention:** Strengthen account management, service quality, communication, responsiveness, and renewal processes.

PRODUCTS / SERVICES

- ☐ **Upsell or Bundle Current Offerings:** Package existing services differently, add premium service tiers, or bundle complementary services already within the current business line.
- ☐ **Product / Services Variations:** For example, a cafe adding seasonal drinks, a cleaning enterprise adding deep-clean options, or a landscaping enterprise adding seasonal maintenance packages. Think of an addition does not require a major change to core operations.
- ☐ **Improve Quality of Product / Services:** Tweak your products or services to better meet the needs and desires of your customers (e.g., faster delivery or a more luxury feeling).

OPERATIONS

- ☐ **Increase Operational Capacity:** Add shifts, crews, supervisors, equipment, production hours, delivery routes, or workstations to serve more demand. Or, address bottlenecks in your processes.
- ☐ **Improve Pricing / Contract Terms:** Add minimum order sizes, retainer contracts, escalation clauses, rush fees, tiered pricing, or better payment terms.

Engine 1 = refine, repeat, improve current business, programs, and services.

EMPLOYEE SUCCESS: current participants + current pathways

INTAKE & RETENTION

- ☐ **Make Intake Process More Efficient:** Better assess readiness, interests, barriers, and fit for the existing business line or training pathway.
- ☐ **Increase Participant Retention and Attendance:** Strengthen coaching, expectation-setting, attendance supports, scheduling practices, and early-warning systems.
- ☐ **Implement Trauma-Informed Care / Design:** Train supervisors in trauma-informed management, coaching, feedback, conflict resolution, and balancing production with participant development.

EMPLOYEE SUCCESS

- ☐ **Standardize Employee Supports:** Create clear skill maps, training checklists, competency milestones, and supervisor tools for current roles.
- ☐ **Add or Strengthen Economic Power Practices:** Improve transportation supports, benefits navigation, childcare referrals, legal aid referrals, food supports, uniforms, tools, emergency assistance, etc...
- ☐ **Alumni Engagement & Supports:** Provide retention coaching, reemployment help, advancement check-ins, and alumni community for participants leaving the current program.

CAREER PATHWAYS

- ☐ **Add Credentials:** Offer certifications that directly improve success in the existing work pathway, such as OSHA, ServSafe, forklift, flagger, customer service, food handler, or digital skills.
- ☐ **Add or Improve Career Pathways + Transitions:** Build steps from trainee to crew member, lead worker, trainer, assistant supervisor, or permanent employee.
- ☐ **Job Placement & Employer Partnerships:** Strengthen employer partnerships, mock interviews, job matching, reference processes, and warm handoffs to employers already connected to the enterprise.

CONTINUOUS IMPROVEMENT



- ☐ **Empower Participant Employee Voices:** Use surveys, listening sessions, exit interviews, and participant advisory groups to refine the current model.
- ☐ **Strengthen Employee Success Data:** Track enrollment, retention, skill gains, wages, placement, job retention, advancement, and participant satisfaction to refine the current program.

WRITE YOUR BET

I need capital / funds for my Engine 1 to _____

Selected strategy: _____