



WELCOME TO THE ALTERNATIVE BOARD

New Member Kit



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TAB Vision



At The Alternative Board® (TAB), we empower business owners and their leadership teams to achieve transformational success by improving their businesses in ways that change their lives. By fostering a global network of collaboration, innovation, and accountability, we are the most impactful business advisory organization in the world. Our everyday actions inspire growth, lasting change, and excellence, ensuring that everyone in our community thrives in our shared journey toward success.

Congratulations on your decision to join The Alternative Board®! You've chosen to engage in a community that will improve your business, refine your focus, and help you to become the very best leader you can be. Our mission is to support each TAB Member in achieving their personal vision of success. Each TAB Board is comprised of highly qualified business owners, CEOs, and Managing Directors like yourself.

Designed to introduce you to TAB, this kit describes the TAB Good Member Charter, how to prepare for TAB Board® Meetings and Private Coaching Sessions, membership subscriptions, and an explanation of TAB's international organization. Your Member Kit is a key to your initial success and sustained participation as a Member of a forward-thinking group of successful business leaders.

This kit introduces our process of peer advice, Leadership Coaching, tools, and other resources that combine to deliver a powerful competitive advantage to your business.

Of course, just joining something doesn't produce results. How much you get from TAB is entirely up to you. To start, we recommend engaging fully for at least the first three months by:

- **Completing a Business Diagnostic**
- **Working with your TAB Facilitator/Coach to develop your Personal Vision**
- **Attending your monthly TAB Board Meetings and participating in the discussions**
- **Engaging with your TAB Facilitator/Coach in coaching sessions to set goals and measure results**

When you truly commit to focusing on your business, you'll be astonished by how much your perspective and business can change in just a few months. We look forward to working with you, and welcome to TAB!

Business Builder's Advantage

You've already built something meaningful. But building a business is not a one-time milestone—it's an ongoing challenge of decisions, leadership, and growth. That's why TAB exists. As a Member, you now have access to Business Builder's Advantage: a complete system designed to help you think more strategically, make better decisions, and continue building the business you originally set out to create.

Rather than relying on scattered advice or one-off tools, Business Builder's Advantage brings together the structure, guidance, and peer perspective you need to keep moving forward with clarity and confidence.

This document is designed to give you a comprehensive overview of your TAB membership. While much of the content focuses on board meetings, you'll also find detailed information on Leadership Coaching, Blueprint, HI-MAP, StratPro, and other services available to you through Business Builder's Advantage.

Five Proven Solutions. All Working Together.

Each element of Business Builder's Advantage delivers value independently, allowing you to choose only what fits your needs. And when you use them together, the impact is transformative.

Peer Advisory Boards

Success thrives in good company. Join a curated group of business owners who offer objective, real-world insight and hold each other accountable.



Leadership Coaching

Seeing your vision clearly is the first step to achieving it confidently. Work 1-on-1 with a seasoned business coach who helps you stay focused, make smarter decisions, and lead with intention.



StratPro

Finally unlock your leadership team's potential by aligning your top performers around a shared vision, clear priorities, and disciplined execution.



HI-MAP

Build strong leaders with structured, focused, real-world training that strengthens skills, confidence, communication, and leadership capacity.



Blueprint

Take back control and lead with intention. Develop a strategic blueprint for focused execution, hosted on our exclusive platform to track strategy with structure and flexibility as your business evolves.



Understanding You and Your Business

Together with your TAB Facilitator/Coach, you will take a deep dive into your vision for your life and your business, where you are today, and who you are as a leader.

DISC® Assessment

Knowing your strengths, your communication style, and how others perceive you is an important stepping stone in your growth as a business leader. It also helps your TAB Facilitator/Coach and fellow TAB Board Members know how to effectively communicate with you so you get the most from every coaching session and TAB Board Meeting. For more information, refer to page 29.



Business Diagnostic

Often there are many conflicting priorities in business, from operations to sales and marketing. This assessment will show you where you have been focusing your time and energy on your business and display gaps in your priorities versus business performance. The results will provide a roadmap for future coaching sessions and TAB Board Meetings. For more information, refer to page 42.

Personal Vision

If you don't know where you are going, any road will get you there. Your business should serve as a vehicle to achieve your vision of personal success. Whether it is to leave a lasting legacy or to afford a lifestyle of your dreams – it is important that both you and your TAB Facilitator/Coach explore not only WHAT you want to achieve, but WHY it is important to you. Equipped with this understanding, future goals and activities in your business will be weighed against whether they get you closer to your personal vision or further away from it. For more information, refer to page 33.



Company Vision

Articulating your vision is important for many reasons. A vision motivates and empowers existing and future employees. It provides a guiding principle to help prioritize goals and plans. It brings meaning to peoples' work, mobilizes them to action, and helps them decide what to do and what not to do in the course of their work. Even if you already have an existing business vision for your company, your TAB Facilitator/Coach will examine whether you and your team are truly aligned and committed to the vision and have a roadmap to get there. For more information, refer to page 35.

Being Prepared

Now that you know where you want to go and why you want to go there, your TAB Facilitator/Coach will help you with preparation for your first and future TAB Board Meetings.



Your Member Bio



Preparing your introduction to your board



Getting to know your fellow board Members



Boardroom etiquette and behavior



Preparing a topic to bring to your board



Contributing ideas and suggestions

Paving the Way

With a clear vision of what personal and business success looks like, your Facilitator/Coach and fellow Board Members can help you focus your attention on the areas in your business and life which will help get you there faster, with less stress. Your path will combine **short-term** goal setting and **longer-term** Strategic Business Planning—always with your Personal and Business Visions top of your mind.



90-Day Goals

Together with your TAB Facilitator/Coach, you will be working on a goal you will achieve every quarter in your business. Your TAB Facilitator/Coach will meet with you every month to discuss progress and the next steps.



Board Meetings

Each month you will meet with your TAB Board and review the current status of your business. You will present an issue or opportunity to your TAB Board for feedback. Leveraging the power of years of local business knowledge from fellow owners who have often been there before you, the expertise you have access to will help you make better decisions in your business.



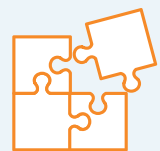
Key Performance Indicators (KPIs)

It has been said, “you cannot change what you do not measure.” You and your TAB Facilitator/Coach will decide on some simple metrics to measure in your business for lasting positive change.



SWOT Analysis

Knowing your company’s Strengths, Weaknesses, Opportunities, and Threats is an important exercise so you are not “flying blind” in your business. It also helps you understand and focus your attention on the right areas of your business so you can make better decisions now and in the future.



Critical Success Factors

Before you can do any long-range planning for your business, you need to understand the Critical Success Factors that determine successful outcomes. You and your TAB Facilitator/Coach will delve deeper into what components contribute most to the success of your business so that you focus on the outcomes in your business that truly matter.

Moving The Needle

Now that you have laid the right foundation, you can make better decisions in your business and drive it forward. Like you and your business, your priorities, goals, and strategies are constantly evolving. You will continue to work on these areas of your business with your Facilitator/Coach and Board Members for as long as you are a Member of TAB.

- Search (just masters) sit + working
- read v unread
- Peer Boards Masters
- attend, communicate, follow the process

Goals

Strategies

Actions

Tactics

The TAB Way™

The TAB Way™: Our Culture

As we know from working with our Members, all businesses have cultures. Each culture theoretically reflects the stated values of the organization, but what a business' culture really boils down to is “how we do things around here.” The TAB Way™ embodies TAB's culture of how TAB Business Owners (TBOs), Master Partners, and the Home Office team interact as a community.

TAB's Culture Statement

At TAB we support and celebrate our community Members' personal and business visions, journeys, and achievements through measured accountability, collective wisdom, lifelong learning, innovation, and leveraging global best practices and tools. We are a giving and receiving community, where we treat each other as we would like to be treated and pursue trusted advisor relationships.

The TAB Way™ Standards

Over the years, the TAB system has permitted significant flexibility. Some of that flexibility is good — it reflects the particular styles and capabilities of local Board Members and Facilitators. At the same time, establishing a certain level of consistency ensures that our TBO community is better served, no matter where in the world we go.

To that end, TAB has developed a set of cultural standards remembered through the acronym **CALIBER**, which is explained in the following pages. While you have your own values for your business, you should expect to see these values reflected in your interactions with your TAB Facilitator/Coach, as well as in all communications and interactions with TAB services, forums, and team members.



The TAB Way™ Culture Standards



Community

I am a willing participant in community events such as conferences, peer board meetings, webinars, and group calls. I provide my opinions, advice, and feedback on TAB's facilitator hotline and surveys to help grow our system and brand. I proactively seek out opportunities to positively interact with my TAB colleagues, so that others can benefit from my experience, and myself from theirs. I recognize and give kudos to others who have a positive impact on me and my business.

I am accountable for my outcomes and I regularly set goals for myself and my business. I strive to always meet my commitments to myself and others. When I fall short of my goal, I do not use blame or excuses, but rather look to how my actions, skills, or mindset could have played a part in the end result. I am on a path of constant and never-ending improvement and I make sure to celebrate my achievements along the way. I also welcome and give permission to my TAB colleagues to provide constructive feedback whenever I am out of alignment with The TAB Way.



Accountability



Lifelong Learning

I am open minded to new ways of thinking. I attend TAB webinars, group calls, peer board meetings, and conferences. I read the TAB newsletter, blog, and social media feeds. I am curious about business, management, leadership, and personal development. I like to stay in touch with what is happening in my local community and the greater business arena, so I regularly read and listen to books, videos, podcasts, and find other ways to constantly "sharpen my saw." I regularly seek feedback and best practices from others within the TAB community, and willingly share my perspectives and life lessons with others in return.

I am growth-minded and innovative. I know change is the only constant, and in order to grow I must adapt and be open to new ways of thinking, as well as learn new TAB processes and tools. I am always searching for new and better ways to add value to existing TAB systems, processes, and tools, and provide constructive feedback during all phases of roll-out, adaptation, and adoption.



Innovation

The TAB Way™ Culture Standards

B

Belief

I am passionate about TAB and the impact it has on businesses, communities, and lives. I truly believe businesses, and their owners, will always be more successful when they join TAB. I always speak positively about TAB, its people, and Members. I seek out ways to introduce business owners to experience TAB, and share success stories online and in person. I follow and engage with TAB on social media profiles so that TAB's story and benefits are amplified so that others can benefit from TAB Membership.

I am accountable for my outcomes and I regularly set goals for myself and my business. I strive to always meet my commitments to myself and others. When I fall short of my goal, I do not use blame or excuses, but rather look to how my actions, skills, or mindset could have played a part in the end result. I am on a path of constant and never-ending improvement and I make sure to celebrate my achievements along the way. I also welcome and give permission to my TAB colleagues to provide constructive feedback whenever I am out of alignment with The TAB Way.

E

Excellence

R

Respect

I treat everyone with respect, listening attentively and communicating appropriately. I respect the differences in others, and when I have a problem with a colleague, I always speak to them directly so that we can find common ground or understanding and move on.

Good Member Charter

To be a good TAB Member, you must commit to the following:

- The Board Meeting belongs to you.
- You are in the Board Meeting for help and to help rather than to impress others.
- The success of the Board Meeting rests partly with you.
- Enter into discussion enthusiastically.
- Give freely of your experience.
- Confine your discussion to the topics on the agenda.
- Say what you think.
- Make your remarks impersonal and free from prejudice.
- Listen alertly to the discussion.
- Be patient with other Members.
- Appreciate other Members' points of view.
- Avoid monopolizing the discussion.
- Assist in reaching conclusions.
- Be a good sport when the discussion goes against you.
- Be prompt and attend regularly.
- Be prepared with what you want to discuss during the allocated time period.

“

“TAB has helped me realize that I can be as effective without working 60 hours a week.”

ANTHONY SCOVAZZO

AJS Consulting Engineers, Member Since 2009



Attendance

As a TAB Board Member, you are expected to attend all meetings except in the case of a significant conflict. **You should be able to attend at least 75% (9 out of 12) of the meetings annually.**

There are two types of absences: **With Notice** and **Without Notice**. If a Member provides notice by the Friday before their scheduled meeting, the absence is considered With Notice. Any notice given after that time is considered Without Notice.

Providing advance notice helps the Board plan effectively and ensures that meeting time is used productively for everyone. Consistent participation and timely communication support the accountability and trust that make the Board valuable for all Members.

The integrity of each TAB Board is based, in part, on the knowledge that every Member at the table comes with a similar level of commitment. TAB does not permit observers, employees, or substitutes to attend the meeting in the place of an active Member.

Etiquette

Experience has taught us that few Members are strong in all areas of business. Therefore, there is no such thing as a “stupid” question or something that a person “should” have known. In fact, we attempt to strike the word “should” from all discussions. **There is no room whatsoever on a TAB Board for cynicism or arrogance.** Because we want everyone to feel free to discuss any issue, it is important we set the boundaries of what is and is not acceptable in a Board Meeting.

TAB does not condone foul language, and it is not appropriate in this setting. If you are offended by questionable language or gestures, please bring it to the attention of the Facilitator/Coach immediately, and they will deal with it privately.

Each Board will also create their own TABenos Code, much like a Code of Conduct, which will identify what is allowed and not allowed as acceptable behavior in the meetings. It’s the responsibility of all Members of the Board to ensure this code is adhered to. Further details about TABenos can be found in the Board Meeting section of this kit.

Critical, negative, or offensive comments regarding race, religion, sexuality, or prejudices towards any minority or group will not be tolerated, regardless of intent. Should they occur, they will be brought to the offending Member’s attention immediately by the Facilitator/Coach. All complaints should be directed to the Facilitator/Coach. If the Facilitator/Coach is the offender, direct complaints to TAB World Headquarters by emailing _MemberServices@TheAlternativeBoard.com.

Dress Code

Members come from all types of industries, so attire will differ significantly and as a result, **there is no dress code.**

Dues and Billing

Dues are billed in advance for the upcoming month by TAB World Headquarters in Westminster, CO, on a monthly, quarterly, or annual basis—per your membership application. Billing occurs on the 10th of the month for payments made by check, and on the 20th for payments made via ACH or credit card. If either date falls on a weekend or holiday, billing will be processed on the preceding business day.

TAB facilitators and coaches reserve the right to restrict access for Members with outstanding balances. From time to time, membership dues may be adjusted, with Members receiving ample advance notice of any changes.

If you have inquiries regarding invoicing, feel free to contact us at accounting@thealternativeboard.com.

Resignations and Terminations

It is not easy to replace a quality Member. TAB requires fees to be paid regularly (or as agreed in your membership application) and at least 30 days' notice to be given to resign. However, in consideration of the entire TAB Board, we would hope that a TAB Board Member will “resign in good standing” and **give at least three months' notice while also attending the last three meetings.** The Member will also explain to the TAB Board why they are resigning. This is only fair to the rest of the Members who rely on each other. If a Member resigns in good standing—giving three months' notice—they may return at any time to a TAB Board without paying the initiation fee.

A Member may be terminated by their TAB Facilitator/Coach and/or upon recommendation from their TAB Facilitator/Coach or a Member followed by a consensus of the TAB Board Members. If a Member is terminated from a TAB Board, they forfeit any fees already paid to TAB.

Spread the Word

If you are experiencing great value from your TAB Board, why not share that value with other business owners? Referrals help build stronger TAB Boards and a stronger global membership base that benefits all TAB Members.

Provide names of referrals to your Facilitator/Coach, and be sure to include a comment about why you think this individual would be an asset to a TAB Board (whether yours or another TAB Board). TAB Boards operate in over 1,000 cities worldwide, so you may refer Members from anywhere.

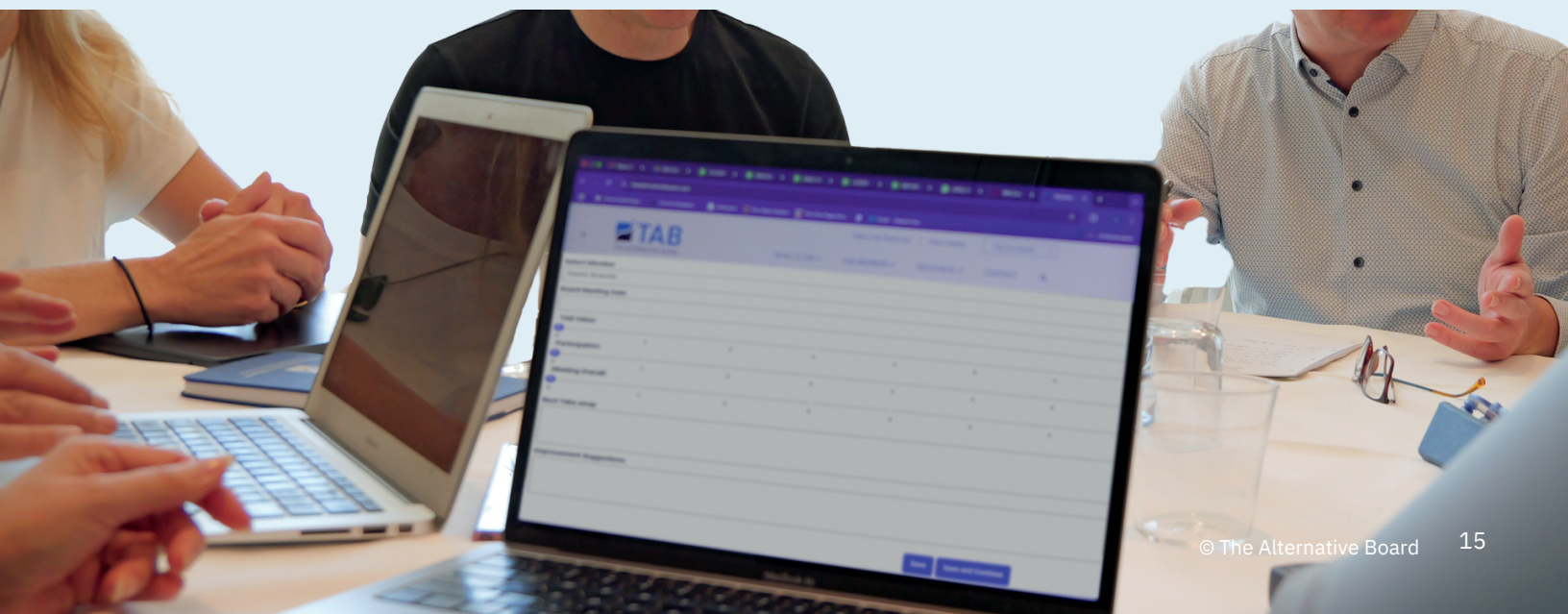
We would appreciate you speaking to your referral about why you're recommending TAB prior to us contacting them.

The TAB Facilitator/Coach will determine the most appropriate TAB Board for a referred prospective Member. If your referral is local and you do not want them on your Board, notify your Facilitator/Coach. As your referrals join a TAB Board, we'll keep you informed.

Along with referring others to a TAB Board, you can also share your experience by giving your testimonials and case studies to your TAB Facilitator/Coach, leaving an online review, speaking with colleagues and business associates, and participating on TAB's social media.

Feedback

Throughout your time as a TAB Member, your Facilitator/Coach will invite you to give feedback on your Member experience. During these sessions, you will be asked to complete an evaluation form which helps us to ensure that all our Members are enjoying their TAB experience and are receiving full value from their board. We will also ask for brief feedback at the end of every board meeting.



Networking

Although the purpose of belonging to a TAB Board is not primarily to obtain business from your fellow Members, it does occur on occasion. When engaging in business, **it is recommended and asked that Members document their proposed agreement or transaction with fellow Members.** Remember, the more you can have in writing with respect to these types of transactions, the less likely a problem will arise and interfere with the monthly TAB Board Meeting.

If you engage another Member's services, it should be because you are confident they supply the best product or service—not because you believe you should get a discount or out of a sense of obligation. You do not have to offer special discounts to other Members.

Social Media

When you become a TAB Member, you are given access to the Blueprint™, our Leadership Exchange podcast, and Business Resources.

Along with your local TAB Board, you also gain access to a worldwide network of TAB Members. **We encourage you to follow and engage with The Alternative Board's social media groups on Facebook, LinkedIn, and Instagram to share your experience and promote your business** to thousands of people all over the world.



TAB Connect

Accessed through the Blueprint, TAB Connect enables you to showcase your company and connect with other TAB Members and Facilitator/Coaches worldwide. You can upload a company and personal description, search for other companies, and make 1-on-1 connections to enhance your TAB experience. TAB Connect provides a TAB Member Hotline where you can post topics for feedback and engage with posts from forward-thinking TAB Members like yourself.

This is not a selling platform – it’s a collaboration and connection system. As well as meeting and exchanging ideas with other people in the TAB Community, you can also use TAB Connect to store information and notes about your TAB journey, including board meetings and coaching sessions. There is also a TAB Connect App! Download it on your mobile device and stay connected on the go.

The Leadership Exchange Podcast

The Leadership Exchange is TAB’s podcast where experienced business leaders chat about the real challenges of leadership, strategy, and building resilient companies.

Hosted by the President and CEO of TAB, Jason Zickerman, who brings decades of his own leadership experience to the table, each episode features practical insights, bold perspectives, and honest dialogue designed to help you lead more confidently and make smarter decisions for your business. Check out the most recent conversations [here](#), or you can [subscribe to TAB’s Youtube Channel](#) so you never miss an episode.



Make the Most of Your Private Coaching Sessions



Your private coaching sessions are dedicated time for you to **focus on what matters most**—whether it’s business challenges, personal matters, or long-term planning. Think of your coach as your **thinking partner**, someone who helps you gain clarity, challenge assumptions, and arrive at **better solutions than you would on your own**.

To maximize the value of each session, **preparation is key**. Before each coaching session, take time to reflect on **what’s most important in your business and life right now**. The clearer you are on your priorities, the more effectively your coach can help you think through them.

Common ways TAB Members use their coaching sessions:



**Review
Priorities +
Focus**



**Brainstorm
New Ideas**



**Talk
Through an
Issue**



**Learn a
Leadership
Topic**



**Discuss
Personal
Matters**



**Plan the
for
Future**



**Prepare for Your
TAB Board
Meeting**

Make the Most of Your Private Coaching Sessions

It's important to understand your coach's role. **TAB coaches are not consultants**—they won't tell you what to do. Instead, **they ask great questions, provide fresh perspectives, and help you gain deeper insights**. Your coach is an expert listener, focused solely on helping you work through challenges, seize opportunities, and achieve what you want from your business and life.

Beyond your immediate priorities, your coach will also help you **run your business more strategically using Blueprint™**—our proven methodology developed over three decades working with tens of thousands of businesses worldwide. When time allows, sessions will include Blueprint exercises such as defining your Personal Vision Statement, identifying your Strategic Advantage, or setting your Key Performance Indicators (KPIs) which we refer to as the vital signs for your business. If you're unfamiliar with these tools, no worries—your coach will guide you every step of the way to help you get the most out of this strategic platform.

To make the most of your coaching experience, we ask that you **respect your coach's time as they do yours**. If you need to reschedule, please provide at least **24 hours' notice**, as last-minute cancellations may not be rescheduled that month.

Lastly, your **one-on-one sessions are fully confidential**. Anything discussed will only be shared in your board meetings **if you choose to bring it forward**.



A coach is someone who tells you what you don't want to hear, who has you see what you don't want to see, so you can be who you've always known you could be.

Note Taking

Most Facilitator/Coaches and Members take notes during their private coaching sessions, especially related to any follow-up actions that have been agreed upon. Your Facilitator/Coach will not provide written minutes of coaching sessions or Board Meetings. All Members are encouraged to take notes for their own purposes. Note Taking should be done in TAB Connect.

“

I've found a new energy and clarity since I've joined TAB: the mix of group and one-to-one meetings gives me a safe space to work on my business rather than in it, and that has been transformative. The necessity of preparing my issue for the board each month in itself helps me think more clearly. I'd recommend it without hesitation.”

Alison Jones, Alison Jones Business Services Ltd, Basingstoke

“

The insight of the others and their frank, open and honest advice is refreshing. It enables me to see things more clearly and use the wisdom in the room to help our business progress. As someone who was unsure, to begin with, the depth of trust and the strength of the relationships that I have with my fellow TAB Members is something I didn't foresee. I would recommend joining TAB to any business owner who is looking to grow their business and maturing their role within that business.”

Steve Coburn, Project Five Ltd, Guildford & Woking



Private Coaching Session Notes

Today's Date:

Things I've Learned:



Actions I'm Going to Take:



Additional Notes:



Preparing For Your First Board Meeting

Your first board meeting will differ slightly from the usual format. Rather than the Member Check-In, you will have the opportunity to introduce yourself to the other Board Members and learn more about them and their businesses. The Members' understanding of your business will contribute greatly to the quality of discussion and feedback during future Board Meetings.

Remember, TAB meetings are completely confidential. Members frequently share sales and profit figures and discuss concerns they can't raise in their own companies. You do not have to reveal anything that makes you feel uncomfortable.

In order to prepare for your introduction, Members typically answer some of the following questions:

- Please **describe your business** products, services, and customers.
- What is your company's current number of **employees and annual revenue**?
- **How long have you owned** or been employed by the business?
- **What do you hope to get** from being a TAB Board Member?
- What is your current thinking with regard to **your future exit strategy** from your business?
- What is **your Personal Vision** of what you'd like to see in your long-term future and what you'd like to see for the long-term future for your company?



Preparing a Topic for Your TAB Board

TAB Board meetings are more effective if you invest quality time in preparing for them. We encourage you to consider an issue or opportunity in your business prior to each meeting—one you will offer to the board for insight and advice. Preparing your topic in advance helps make the best use of your time slot by enabling you to describe your topic to the rest of the board accurately, making the best use of your Board Members' valuable time. Topics can be anything you want to discuss which would generate useful advice from other business owners and leaders. Topics typically fall into one of the following categories:

TIME

MONEY

PEOPLE

VISION

STRATEGY

EXIT

Your Facilitator/Coach will help you to prepare your topic and update during your Private Coaching Session. Things to include when preparing your topic:

- **The topic:** Be concise. In one or two sentences, get to the heart of the problem. Is it a concern, challenge, opportunity, or recurring problem that is becoming more troublesome? (See the example on the next page.)
- **It is significant because:** What is at stake? How does it affect money, income, people, products, services, customers, timing, the future, or other relevant factors? What are the potential consequences if this issue is not properly resolved?
- **My ideal desired result is:** What specific results or outcomes do I want?
- **Relevant background information:** Summarize with bulleted points: How, when, why, and where did this issue start? Who are the key players? Which forces are at work? What is the current status of the issue?
- **Action(s) to date:** What have I/we done so far? What options am I considering?
- **The help I want is:** What result do I want from the group? For example, alternative solutions, confidence regarding the right decision, identification of consequences of actions/no action, where to find more information, critique of the current plan, etc.?





Example Topic

Most TAB Members face challenges in finding and retaining good employees. A broad question such as “How do I keep key employees?” would require other Members to spend considerable time asking background questions, so presenting your scenario in such a way that others can easily understand it is of great benefit to everyone. A more precise way of presenting this challenge could be:

“

I employ several technicians who must be trained and certified in their specialty. My company pays for the certification program. Once certified, they receive a salary increase and our usual benefits, which are fairly typical in the industry.

In the last six months, three of my technicians have left for jobs with my customers at a higher salary within a few weeks of getting their certification. My ideal outcome is to continue to pay for their courses and retain my employees long term. How can I discourage my customers from taking my employees or gain a higher degree of loyalty from the trained technicians?”

One of the most valuable benefits of TAB Board membership is accountability. Therefore, each time you bring a challenge or opportunity before the Board and receive feedback from the other Members, you must make a commitment to the TAB Board about what specifically you will do to make progress on the challenge or opportunity in the next 30 days. At the next TAB Board Meeting, you’ll be asked to present whether or not you completed your commitment, and what the outcome was.

Your Board Meeting Update

At the start of every TAB Board Meeting, Members do a check-in. For your first meeting, you'll introduce yourself and your business to your fellow board Members. In future meetings, you'll provide an update on both your business and personal life.



Your Board Meeting Update Includes:

- **Personal Outlook:** On a scale of 0 to 10, how are you doing personally? What is your outlook like? If you are in a good personal space, rate this high. If your outlook isn't that good at the moment, let your fellow board Members know. They want to support you.
- **Business Outlook:** The same goes for your business. What is your outlook for your business?
- **How Full is Your Tank:** Just like your car, do you feel like your tank is full – where it can get you where you need to go – or are you running on empty, where you just don't have the energy or are not in the best mindset to be your best self?
- **3 Wins Since Last Meeting:** Your fellow board Members love hearing about your wins. These can be both business wins and personal wins. Sharing wins at the beginning of a board meeting is a great way for members to celebrate all the positive things going on with each other and approach the meeting from a positive, success-oriented perspective.
- **Emerging Threats:** Have any new threats emerged since the last Board Meeting? Or, have any known threats become more concerning? Your fellow Board Members may help identify some ideas to prepare for new threats.
- **Emerging Opportunities:** Have any new opportunities presented themselves recently? Board Meetings are a great place to discuss opportunities and to solicit advice from other Members to help you capture these opportunities.
- **Freedom Achievement:** This part of the update refers to something that you've done outside of your business. One of the results that many TAB Members achieve by joining TAB is greater balance between business and life. Board Members love hearing about what each Member is doing beyond their work in the business.
- **Additional Notes:** Is there anything else that you would like to share with your fellow Board Members?

In addition to these updates, you'll also report back on the commitment you made to your board in the last meeting. Accountability is a core value of TAB, and following through on your commitments helps ensure steady progress toward your goals.

Board Feedback Form

Member Name:

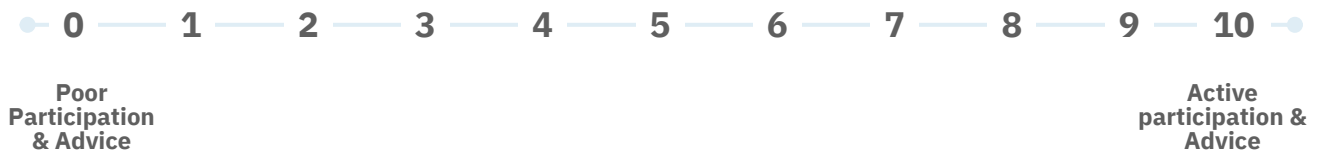
Board Meeting Date:

Please evaluate today's meeting in the following two areas:

Meeting Overall



Member Participation



Overall TAB Value to my Business / Life



What was your best take-away?

What could be improved?

Would you like to refer another business owner to TAB?

May we use your name as the referrer?

Name:

Company:

Phone:

Email:

TABenos - Your Board's Code of Conduct

A powerful proprietary technique called TABenos can quickly help you create open and trusting two-way communication in your TAB Board. The word TABenos is derived from the Greek word “temenos,” which means sanctuary.

TABenos creates a sanctuary—a safe place—for two-way communication. It does so through a series of interactions that effectively lower the natural defenses people raise in response to perceived attacks from others. Once each party starts lowering their defenses, communication can and does improve. Each TAB Board creates its own TABenos Charter. Your Facilitator/Coach will facilitate this process.

Question #1 - What does armor look like for you?

We all use armor from time to time to defend ourselves. When a person uses armor in this way, it usually causes the other person to defend themselves, and communications break down. The better you are at recognizing armor in yourself and others, the easier it becomes to disarm the other person. Examples of answers might include: “withdraw, silence,” “diversion,” or “counterattack.”

Question #2 - What behaviors cause you to don your armor?

These behaviors are the ‘below the line’ behaviors that we do not want to present in our meetings. Examples include using condescending or exclusive language, lack of clarity in communication, hidden agendas, criticism that is personal and not constructive, or lack of appreciation.

Question #3 - What characteristics have to be present for you to feel totally safe?

These characteristics are the ‘above the line’ characteristics that allow you to feel so safe that you can be completely honest and open with those around you. Examples include respectful and inclusive language, encouragement, psychological safety, honest feedback, eye contact, and positive body language.



Board Notes

This can also be done in TAB Connect

Today's Date:

Things I've Learned:



Board Meeting Commitment:



Additional Notes:



DISC® Assessments

What is DISC®?

DISC® is a renowned behavioral assessment tool used by successful businesses worldwide. It unveils the unique behavioral styles of individuals, helping you understand how different team Members communicate, make decisions, and contribute to the overall success of your organization.

At The Alternative Board we offer comprehensive DISC® assessments that reveal four primary personality styles: **Dominance, Influence, Steadiness, and Conscientiousness**. By understanding your dominant style and how it interacts with others, you can enhance your relationships, adapt your communication approach, and achieve greater success. Understanding yourself better is the first step to becoming more effective with others.

Benefits for Your Business

- **Improved Communication:** Gain insights into your team Members' communication preferences, enabling them to interact more effectively, avoid misunderstandings, strengthen collaboration, and foster a positive work environment.
- **Enhanced Team Dynamics:** Identify the diverse strengths and contributions of each team Member, allowing you to create balanced and cohesive teams, leverage the unique skills of your employees, and unlock their full potential.
- **Effective Leadership:** Understand your own leadership style and learn how to adapt it to meet the needs of your team Members in order to lead with greater influence, motivate your employees, and drive results.



The DISC workshop has significantly improved the working dynamics and relationships of our main board. It allows participants to better understand their own personality traits, those of the people around them, and how interactions with different colleagues can be more harmonious and effective. It really has made a positive impact on our business...I would thoroughly recommend it.”

MARK ROBSON, RED MIST LEISURE LTD.

Blueprint®

Blueprint™ is a core tool within TAB’s **Business Builder’s Advantage**, designed specifically for privately held businesses that want to lead and grow more strategically. The platform helps you clarify your vision, track priorities, and align your leadership team around the actions that move your business forward.

You’ll use Blueprint alongside Board Meetings and Private Coaching Sessions, giving you and your fellow Members a shared framework for discussing challenges, measuring progress, and maintaining accountability. Your TAB Facilitator will guide you in using Blueprint effectively so it becomes an active tool for driving strategic execution. Access the Blueprint online at: <https://blueprint.tabboards.com>.

Personal + Company Vision

Having a Personal Vision forms purpose into action, making order out of chaos, and driving us to fulfill a desired future. Aligning a Company Vision with your Personal Vision will lead to greater success.



Business Diagnostic

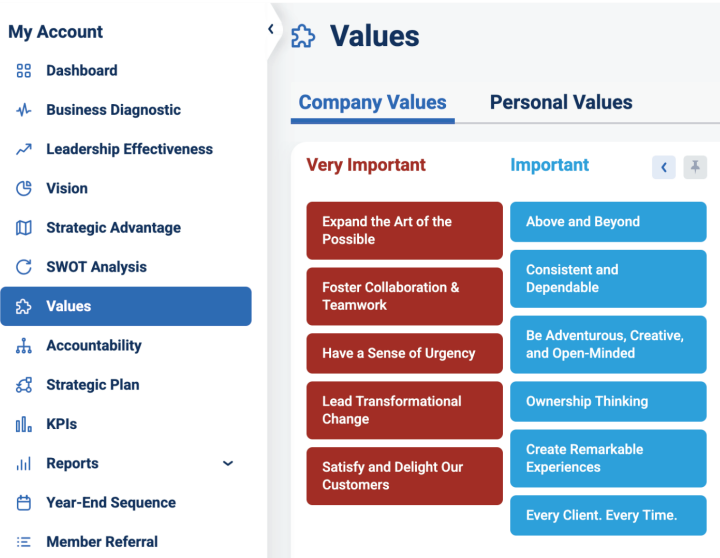
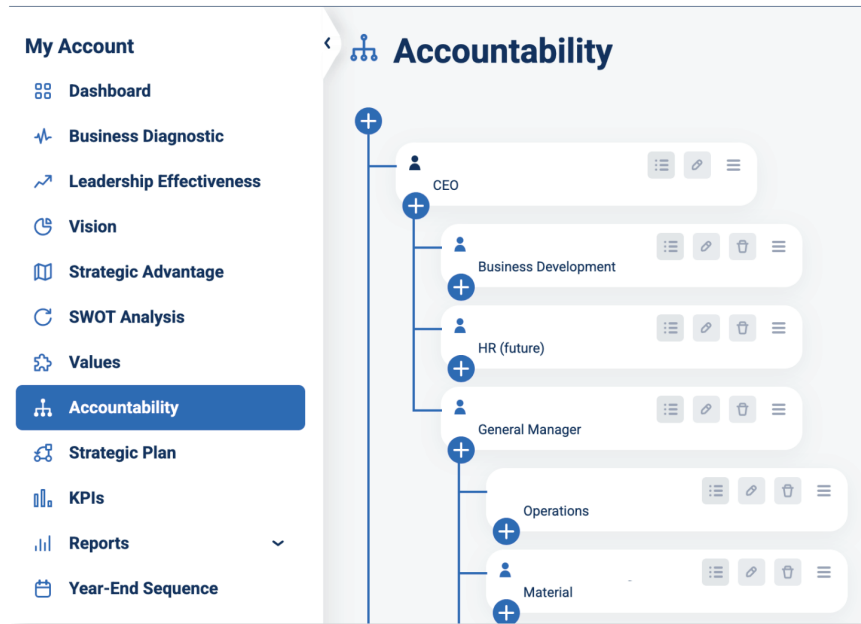
An ‘MRI’ for your business that thoroughly assesses the strengths, weaknesses, and gaps across all areas of your business.



Blueprint®

Accountability Chart

Greater accountability and delegation allow for a better work/life balance and improve the value of your business.



Values & Culture

Uncovers shared company values and establishes a culture that attracts and retains like-minded team Members.

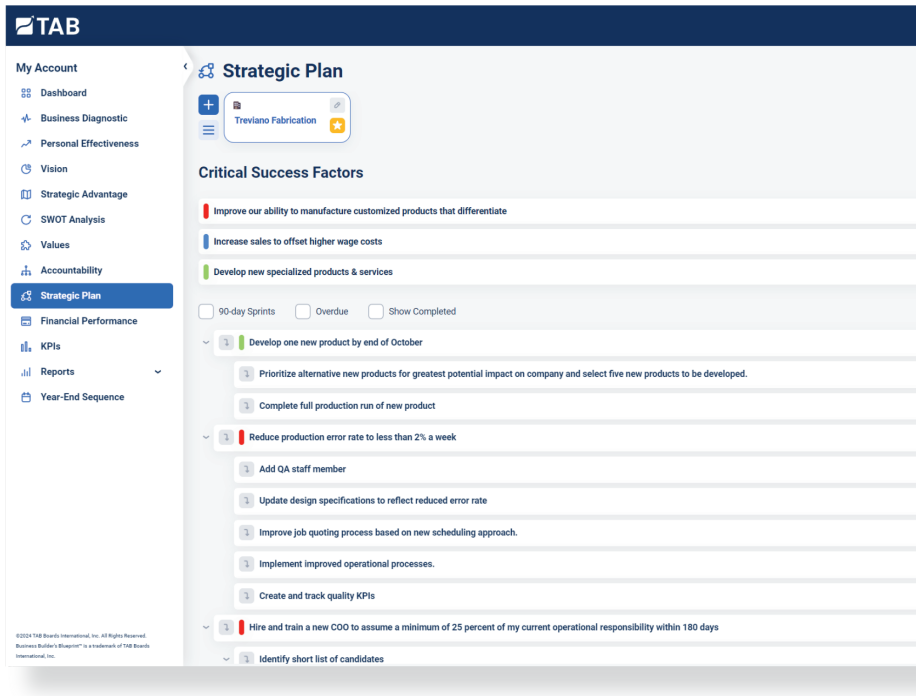
Employee Experience & Customer Experience

Values are what we believe. Culture is how we behave. Blueprint’s Values exercise allows you to specify how your values will be experienced by both employees and customers. The alignment of EX and CX is a strategic advantage for companies.

Blueprint®

Strategic Plan

The strategic planning tool helps develop the right-sized plan for your organization, leading to clarity, simplicity, and accountability.



Strategic Advantage

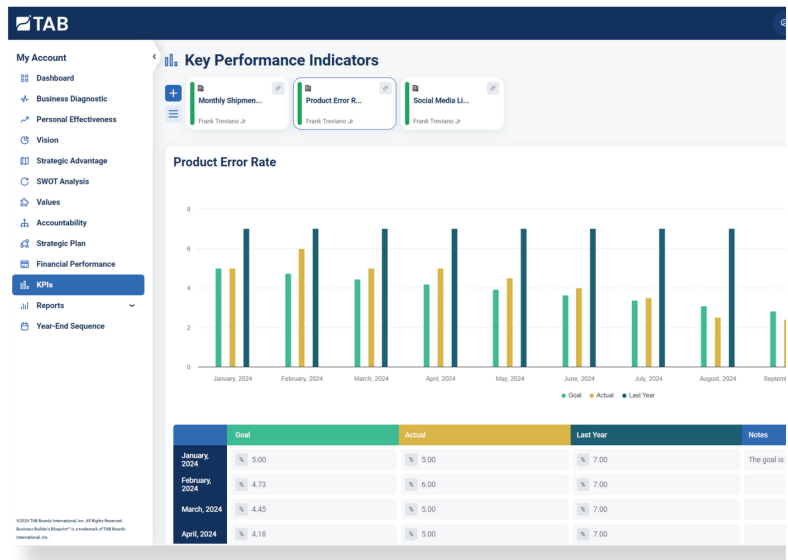
Identify what your customers value, how your offering is differentiated, and how to communicate this powerfully to your market.

Critical Success Factors

Blueprint helps TAB Members focus on what is most important to achieve their success. Part of this is identifying your Critical Success Factors, which is a small number of the most important factors that are critical to your success.

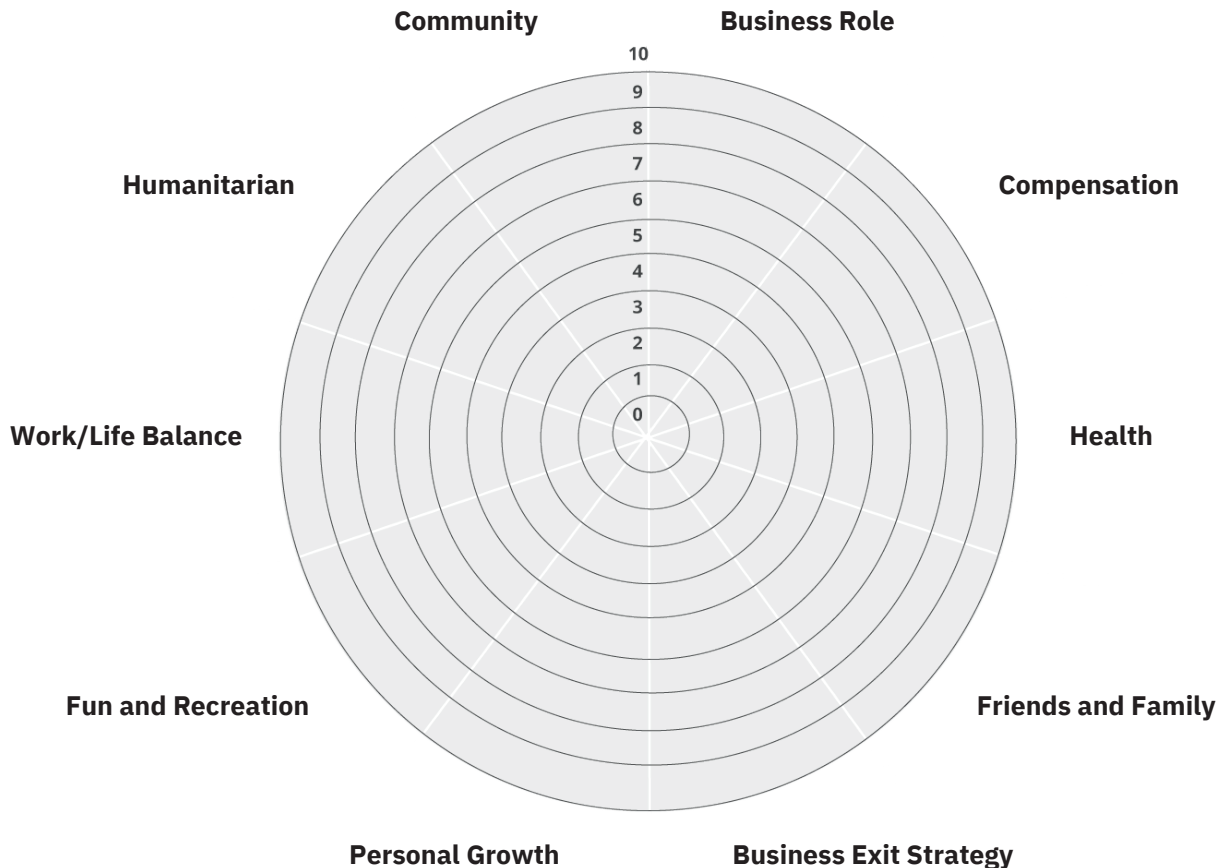
Key Performance Indicators

Set and track the 'vital signs for your business' to guide informed decision-making.



Personal Vision

Directions: The ten sections in the 'Personal Balance Wheel' represent a self-assessment snapshot of your satisfaction with key areas of your personal life. Regard the center of the wheel as 0 (very dissatisfied) and the outer edge as 10 (very satisfied); rank your level of satisfaction in each segment.

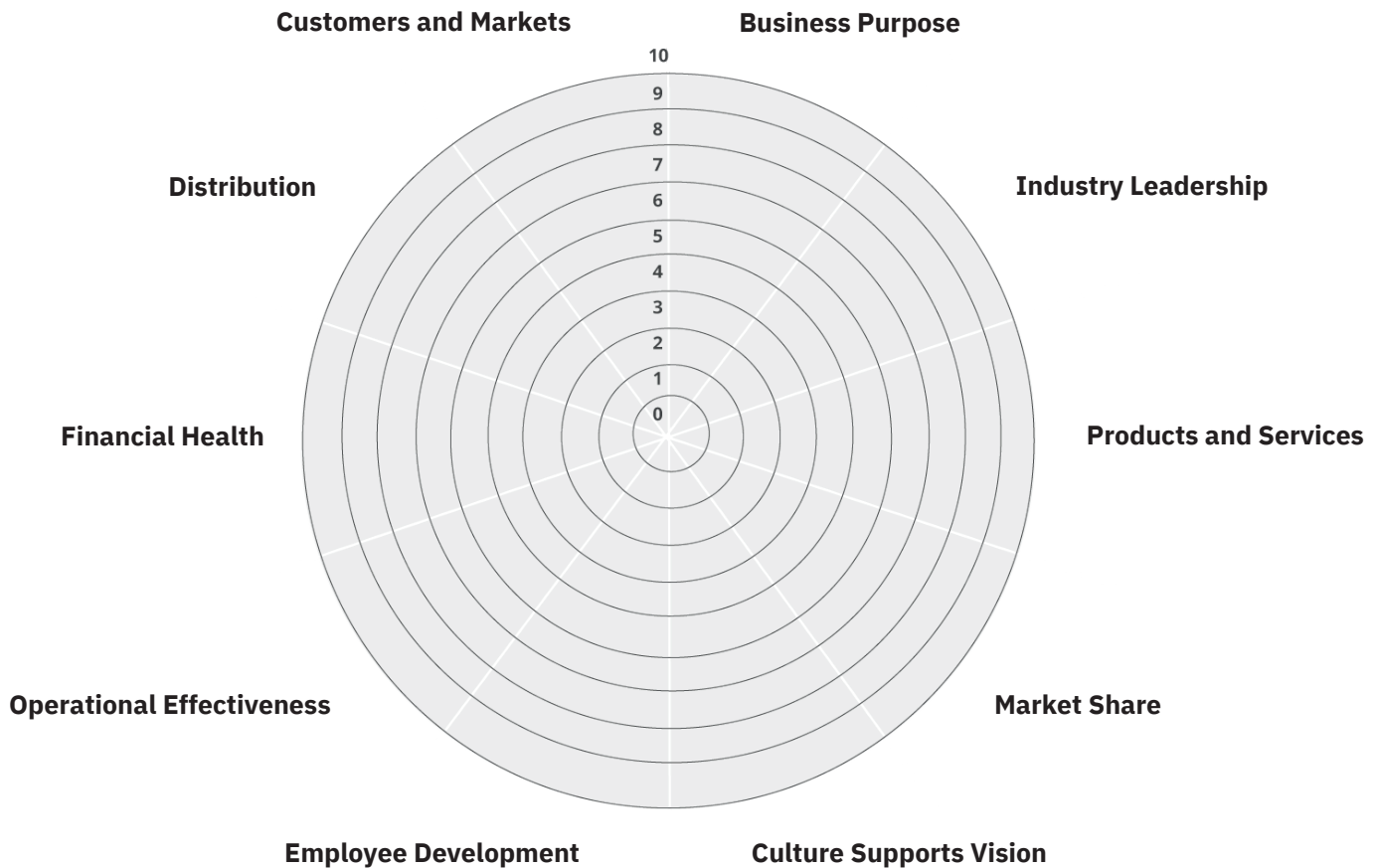


Personal Balance Wheel Questions:

- Are you involved in company activities that you enjoy doing and have the greatest potential impact?
- How satisfied are you with the compensation and rewards you receive from your business?
- How satisfied are you with your current level of health?
- How satisfied are you with the amount of time you spend with friends and family?
- How satisfied are you with your business exit strategy?
- How satisfied are you with your personal growth and achievements?
- How satisfied are you with the amount of time you spend on fun and recreation?
- How satisfied are you with the number of hours you work per week?
- How satisfied are you with your involvement and impact in humanitarian interests?
- How satisfied are you with your impact on your local community and/or your business community?

Company Vision

Directions: The ten sections in the 'Company Balance Wheel' represent a self-assessment snapshot of the effectiveness of your company in key areas. Regard the center of the wheel as 0 (very dissatisfied) and the outer edge as 10 (very satisfied); rank your business's level of effectiveness in each segment.



Company Balance Wheel Questions:

- How clearly do you define and communicate the purpose of your business beyond profitability?
- How satisfied are you with your perceived status and leadership position in your industry?
- How satisfied are you with the mix, quality, and differentiation of your products and services?
- How satisfied are you with your market share compared to the competition?
- How satisfied are you with the culture of your business?
- How satisfied are you with the current programs to find, develop, and retain your employees?
- How satisfied are you with the strength of your current business operations and technology?
- How satisfied are you with the financial health of your company?
- How satisfied are you with your geographical footprint and your distribution channels?
- How satisfied are you with your penetration into potential markets, industries, and customers?

SWOT Analysis

Strengths and Weaknesses Exercise

Directions: The sections in the ‘Strengths and Weaknesses Balance Wheel’ represent a self-assessment snapshot of the effectiveness of your company in key areas. Regard the center of the wheel as 0 (very dissatisfied) and the outer edge as 10 (very satisfied); rank your business’s level of effectiveness in each area.



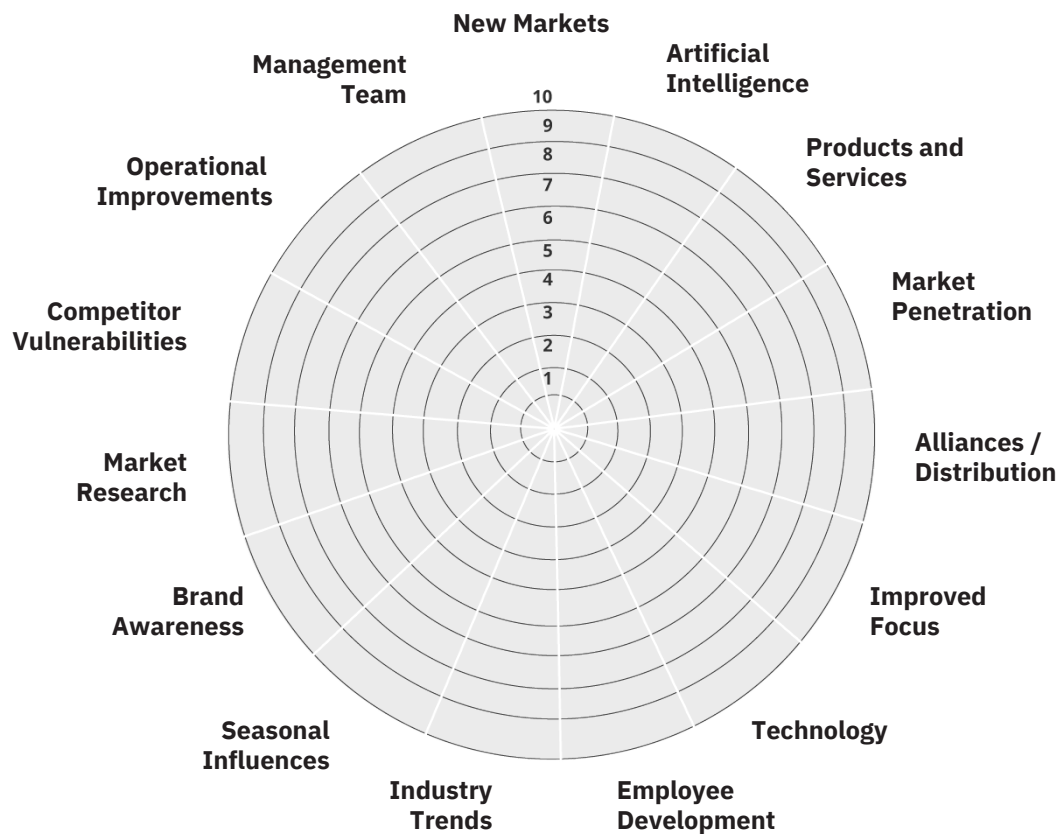
Strengths and Weaknesses Balance Wheel Exercise

- How satisfied are you with your impact on the company without it depending on you?
- How would you rate the strength and resilience of your management team?
- How would you rate your operational strength, scalability, and efficiency?
- How do you rate against your competitors in the marketplace?
- To what degree is your company culture where you want it to be?
- To what extent is your brand a strength or weakness in your business?
- How differentiated and defensible are your products and services from your competitors?
- To what extent do you leverage relationships strategically to the benefit of your business?
- How effectively have you planned and achieved the strategic objectives of the business?
- To what extent does your business deliver the financial results you expect?
- To what extent are your company’s location, geography, intellectual property, business processes, and other resources or assets a strength or weakness?

SWOT Analysis

Opportunities Assessment

Directions: The sections in the ‘Opportunities Balance Wheel’ represent a self-assessment snapshot of the opportunities of your company in key areas. Regard the center of the wheel as 0 (little opportunity) and the outer edge as 10 (significant opportunity); rank your business’s opportunities in each segment.



Opportunities Balance Wheel Exercise

- How significant is the opportunity to expand into new markets?
- Have you explored the opportunities that AI presents to your business such as operational efficiency, customer service, and ideation?
- What impact would offering new products, services, and recurring revenues provide to your business?
- What opportunity is there to better penetrate existing markets and customers?
- What opportunities exist to develop new alliances and distribution channels?
- How might better governance, accountability, and performance management improve your business?
- What impact would utilizing new technology provide to your business?
- To what extent can the skills and capability of your staff be matched to future business needs?
- What opportunities exist to take advantage of emerging trends and future customer needs in your industry?
- How significant are the opportunities to take advantage of seasonal, capacity, and market variations?
- What opportunities exist to improve the awareness and demand for your brand?
- What business or market intelligence could you gather to create an advantage?
- How significant are the opportunities to capitalize on competitor vulnerabilities?
- What impact would operational improvements provide to your business?
- What opportunities exist to improve the effectiveness and alignment of your team?

SWOT Analysis

Threats Assessment

Directions: The sections in the ‘Threats Balance Wheel’ represent a self-assessment snapshot of the threats to your company in key areas. Regard the center of the wheel as 0 (little threat) and the outer edge as 10 (significant threat); rank your business’s threats in each segment.



Threats Balance Wheel Exercise

- Do you have health, time, or other availability issues that are a threat to your business?
- How significant is the threat of losing key managers or employees?
- Are there emerging changes in your culture that could threaten your business?
- Have any of your key competitors implemented changes that threaten your business?
- How significant is the threat of new competitors or substitutes?
- Are there pricing trends in your industry that are a threat to your business?
- How significant is the threat of economic factors to your business?
- How significant is the threat of legislative or regulatory changes to your business?
- How dependent is your business on a small number of customers?
- Are there significant changes to the demographics of your market that could threaten your business?
- Have you explored the threats that AI presents to your business such as new competition, automation, and pricing pressure?
- Are there emerging advancements in technology that could threaten your business?
- How significant is the threat of weather or environmental risks to your business?
- Are your assets and data at risk due to poor internal controls or lack of insurance?

SWOT Analysis

Strengths and Weaknesses tend to be internal to a business and Opportunities and Threats are external. When identifying the Strengths, Weaknesses, Opportunities, and Threats for your business, the best practice is to identify a small number of the most important factors in each area. The Business Diagnostic is a good exercise to identify SWOT factors.

	POSITIVE	NEGATIVE
INTERNAL	Strengths	Weaknesses
EXTERNAL	Opportunities	Threats

KPIs: Measuring What Matters

Key Performance Indicators (KPIs) are measurable indicators that reflect success factors. The KPIs selected must reflect the organization's goals, be essential to its success, and be measurable in a predictable way. KPI's are usually long-term considerations for an organization. You may measure your KPIs monthly or quarterly. You may chart your KPIs against last year's figures, budgets, percentages of sales, hours, units, etc.

As Peter Drucker famously said, "What gets measured gets managed." Many business owners make decisions based on experience or gut feel rather than real metrics. KPIs allow you to identify a small number of predictable factors that influence the success of your business. The following are some common KPIs.

Financial

1. Return on Investment
2. Return on Capital
3. Return on Equity
4. Profits
5. Gross or Net Profit Margins
6. Inventory Days
7. Accounts Receivable Days
8. Accounts Payable Days
9. Payroll to Sales
10. Cash Flow



Internal Business Processes

1. Number of Activities
2. Accident Ratios
3. Equipment Effectiveness
4. Returns
5. Quality
6. Cost of Goods Sold



Customers

1. New Customers Acquired
2. Customers Lost
3. Net New Customers
4. Outstanding Balances by Customer
5. Complaints



Sales

1. Number of Suspects
2. Number of Prospects
3. Number of Leads
4. Number of Proposals
5. Number of Closes
6. Number of Repeat Orders



Business Diagnostic

With the Business Diagnostic, you gain a competitive advantage by assessing your company from a comprehensive, analytical perspective and developing appropriate plans to address what you discover from the process. Be sure to dedicate sufficient time to complete the assessment to gain a realistic perspective of the strengths and weaknesses of your company. It can be taken section by section or a few sections at a time over several months. The assessment can also be taken by other key executives or employees in your organization to compare your interpretation of the organization with theirs.

Getting Started

When you begin the Business Diagnostic, you will be presented with a list of business categories and will be asked to place each one into a column based on its importance to your business:

Extremely Important, Very Important, Moderately Important, Slightly Important, Insignificant, or Not Applicable.

Simply drag and drop each category into the column that best reflects its current importance. Within each column, you can also rearrange the categories so that the most important item appears at the top. Once you have prioritized the categories, the diagnostic will present them to you in priority order, allowing you to focus first on the areas that matter most to your business.

The following are short descriptions of some of the most commonly diagnosed categories.

- **Planning:** Is your company holding strategic planning sessions? Do you have a company vision?
- **Employee Development:** Is your company motivating its employees to achieve goals?
- **Marketing:** Is your company marketing on a consistent basis? Do you have a marketing process?
- **Sales:** Is your company training its salespeople? Do you have a selling process?
- **Internal Communications:** Are all employees of your organization updated on the performance and future of the business?
- **Customer Service:** Is your company maintaining contact with all its customers and evaluating its service from their perspective?
- **Operations:** Is your company following defined operational procedures to operate the business?
- **Information Technology:** Is your company using the vast capabilities of information technology?
- **Corporate Finances:** Is your company using financial statements and capital resources properly?
- **Human Resources Procedures:** Is your company following required procedures to insure against legal actions from employees?

Why the Diagnostic Matters

The Diagnostic is one of the most valuable tools available to Members because it helps you “know what you don’t know.” It can reveal hidden weaknesses that need to be addressed, strengths that should be accentuated, and opportunities you may not have considered.

Unlike other diagnostic tools, this is not a subjective assessment. It asks you to compare your business's performance across many areas against specific best practices found in successful private businesses. Most importantly, it helps you identify what better performance in key areas could look like — giving you a clear path forward.

⚡ Prioritization
 Please review and prioritize the following categories to proceed.
 ▲ The section and placement matter.
 Start with "Extremely Important," placing your highest priority at the top. The tiers show importance, while your order within each tier adds context and creates a clear structure.

Extremely Important	Very Important	Moderately Important	Slightly Important	Insignificant	Not Applicable
Artificial Intelligence *	Sales	Internal Communications	Human Resources	Exit Planning	Distribution
Customer Service *	Employee Development	Team Alignment	Information Technology	International Markets	Family Businesses
Planning *	Leadership	Operations *	Time Management	Companies That Bid for Work	Non-Profits
Marketing *			Financial Management		Retail
					Manufacturing

Performance

The next section(s) will ask you a series of questions to gauge your performance in each of the business/special interest categories. Your Facilitator/Coach will review the report with you in your private coaching sessions and help you use the findings to make key improvements in your business.



Strategic Planning

Once you've established your vision, for your life and your business, and analyzed where you are now, through the Business Diagnostic and SWOT Analysis, the other key part of Blueprint is creating a strategic plan for how you're going to get there.

Critical Success Factors

Critical Success Factors (CSFs) are those factors in which your company must excel for it to succeed and ultimately attain your Company Vision. CSFs are conceptual in nature and don't contain measurements, timescales, or financial measurements. It is necessary to review your Company Vision Statement and Company SWOT Statement in order to determine the CSFs for your company.

Goals

The next step is to define at least one 'SMART' (Specific, Measurable, Achievable, Realistic, Timely) goal for each CSF. This will be the way you measure success in that critical area of the business.

Strategies

Once you know where you need to focus and how you will measure success, strategies are the ways that you can achieve your goals. Most goals will have a number of different strategies that could individually or collectively contribute to success in that area. These are conceptual in nature and give you options for achieving success.

Actions + Tactics

Now is the time when you must identify the actions needed to implement each of your Strategies. Your Actions need to involve specific steps and state deadlines and time frames. In addition, you need to determine how you will measure the results or impact and who will be responsible for the action. Tactics enable you to break those Actions down even further into bite-sized chunks.

CSF EXAMPLES:

- Increase sales to offset higher salary costs.
- Develop new specialized products.
- Implement ISO with our manufactured products.

GOAL EXAMPLES:

- Increase sales by 10% by December 31st.
- Reduce production errors to less than 2% per week by January 1st.
- Maintain gross margins at a minimum of 23% after first year.

STRATEGY EXAMPLES:

- Create internal production capabilities.
- Generate a new product development plan.
- Create a new product marketing sales plan.

ACTION/TACTIC EXAMPLES:

- Manufacturing is to begin by December 17th.
- Finalize the plan in a follow-up committee meeting on June 29th.
- First new product off the line by December 18th.

StratPro®

Leading Alone is Leading the Hard Way.

As a business owner, you're carrying the weight. The vision, the strategy, the day-to-day work. StratPro facilitated workshops help you scale with more certainty by empowering your teams so everyone can achieve more together. Designed for busy leaders and their teams, StratPro combines strategy and productivity to deliver lasting results. This transformational program fuses proven strategic tools, expertly facilitated leadership workshops, and structured follow-up sessions to define your strategic goals and then ensure execution and accountability.

StratPro Process Overview

Align: Align the leadership team

Vision: Establish vision, values, and culture

Diagnose: Identify gaps and opportunities

Plan: Chart the roadmap to achieve your vision

Execute: Adopt processes to get things done

Optimize: Continually improve performance

Business owners who participate in the StratPro strategic business transformation process can expect to:



Grow their business



Earn Greater Profits



Increase Business Value



Key Outcomes:

- **A compelling vision** for the future of your organization.
- **More freedom** for the business owner to work **ON** the business rather than **IN** the business.
- **Alignment within the organization**, everyone working towards a common vision and a common set of goals.
- **A thriving culture** where employees are more satisfied and productive.
- **The tools to successfully execute** your vision of success.

HI-MAP

Unlock stronger leadership with focused skill development.

Successful leaders know that next-level growth requires high-performing teams. Yet you also know this: the growth phase is tough. HI-MAP is one of the leadership development tools within TAB's **Business Builder's Advantage**, equipping executives and managers with the concrete and soft skills they need to lead confidently and build stronger teams.

No Fluff. Just Real-World Training and Impact.

What sets HI-MAP apart is its built-in accountability. Each session focuses on a specific training topic, and at the end, participants make concrete commitments to apply what they've learned. Between sessions, they receive individual coaching to stay on track. At the next session, they report back on their progress — creating a powerful cycle of learning, action, and accountability. HI-MAP implementors are leadership experts with boots-on-the-ground experience.

The impact? HI-MAP clients' results include:

- ✓ Increased productivity and profits
- ✓ Better retention
- ✓ Improved company value
- ✓ High-quality candidates during recruitment
- ✓ Engaged employees taking initiative
- ✓ Higher satisfaction rates
- ✓ Innovative thinking
- ✓ Risk mitigation

The HI-MAP Formula - Four Skills Development Paths

Improvement Path

Boost productivity, communication, and coaching. In this path, managers sharpen effective communication, time management, mentoring, and our exclusive PAVE Your Way to a Competitive Edge framework.

Influence Path

Lead with Clarity, Confidence, and Purpose - Participants practice and improve facilitating meetings, negotiating power, inspiring leadership, and creating a high-performing culture.

Talent Path

Find and Grow the Right People - Help your “people people” attract and retain the best talent. The Talent Path covers recruiting and hiring, retention methods, developing teams, and dealing with difficult people.

Team Action Path

Execute Strategy with Discipline and Focus - This path covers strategic leadership, success factors and goals, action planning, and KPIs.