

Great
Talent
Great
Business

EP9

Cheat Sheet

**Your Culture is Either by
Design – Or by Default**

Featuring Jack Daly

By Rob Levin, Creator of [Greattalentpodcast.com](https://greattalentpodcast.com)
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Just finished soaking up Jack Daly's rapid-fire wisdom on culture, strategy, and business discipline? This workbook is your space to slow it down, reflect, and actually apply what you just heard. Download this worksheet and let's turn insight into action.

Section 1 - Recognition = Retention

"People are starving for recognition."

How are you showing appreciation—beyond the paycheck?

☒ Brainstorm 3 simple, personal recognition ideas:

1.

2.

3.

Try this:

What's one thing you could implement this week?

Quick win:

Section 2: Proactive Communication Check

"Treat your team like family—with updates, not surprises."

Think about your team (especially remote/hybrid). How proactive is your communication?

Rate yourself:

- ☐ 1 - Reactive chaos
- ☐ 2 - Mostly ad hoc
- ☐ 3 - Consistent-ish
- ☐ 4 - Pretty solid
- ☐ 5 - Smooth and proactive

Add 2–3 ways you could improve or systematize communication (**think**: weekly video updates, internal newsletter, daily huddles):

Section 3: The Non-Sales Playbook

“Franchises win with playbooks. Why shouldn’t you?”

Pick a non-sales process (e.g., onboarding, client handoffs, reporting).

Current steps:

1.

2.

3.

Playbook upgrades:

What needs to happen every time?

Where do things usually break down?

Who owns it?

Draft your first step toward a playbook:

Section 4: Financial Planning Reality Check

“A plan without accountability is a wish.”

Do you have a financial plan with clear accountability?

Score yourself:

- ☐ 1 – Flying blind
- ☐ 2 – Some projections, no owners
- ☐ 3 – Budget with assigned owners
- ☐ 4 – Reviewed monthly
- ☐ 5 – Tight, proactive, and data-driven

What 2–3 areas need more financial discipline?

1.

2.

3.

Who could own each?

1.

2.

3.

Section 5: Focus = Growth

“Focus precedes success.”

List all your current offerings:

- Circle your top performers: highest margin or growth.
- Cross out anything that's stealing focus with low ROI.

What should you double down on?

What might you let go of?

Section 6: Better, Not More Customers

“Serve fewer clients—better.”

Your top 10–20% of customers:

1. Who are they?

2. What makes them great (revenue, ease, alignment)?

Common traits of your **“ideal client”**:

How can you attract more of them?

Section 7: Expense or Investment?

Think of a recent business expense you paused or rejected due to cost. Now reframe it:

Could it be a long-term investment in:

☒ Culture?

☒ Growth?

☒ Team retention?

 Reframed decision:

“I originally saw [X] as an expense, but I now see it as an investment in [Y].”

***“Culture by design means being proactive—schedule it,
commit to it, and watch your team thrive”***

For more information and resources, scan the following QR codes:



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