

— Where **Shift** Happens! —

Transforming the way small businesses **think**, **plan**, and **grow**.

STRATEGY SHIFT

— THE SMALL BUSINESS OWNER'S —
GUIDE TO **DESIGNING A BETTER BUSINESS**



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REAL STRATEGIES



REAL CONVERSATIONS



REAL RESULTS

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Introduction

Your Business Didn't End Up Here by Accident

"Successful businesses don't happen by accident. They're intentionally designed."

Adam Levin

Co-host, Strategy Shift Podcast

When you started your business, you probably weren't dreaming about payroll, software subscriptions, hiring challenges, marketing plans, or cash flow projections.

You were thinking about the opportunity.

Maybe you had a skill people were willing to pay for. Maybe you saw a gap in the market. Maybe you believed you could serve customers better.

So you took the leap and built a business.

At first, the formula seemed simple: find customers, do great work, get paid, repeat.

Then the business grew.

Growth brought customers, employees, technology, expenses, and responsibilities. Somewhere along the way, you stopped simply delivering a service and started leading an organization.

That's often when things get complicated.

The days become busier without becoming more productive. Decisions pile up. Small problems become constant interruptions. Vacations become difficult because the business still depends on you to keep everything moving.

The freedom you hoped entrepreneurship would create can suddenly feel further away than ever.

Over the past several years, we've interviewed entrepreneurs, CEOs, financial experts, leadership coaches, marketers, technology consultants, and business advisors on the Strategy Shift podcast.

Their areas of expertise varied, but one idea surfaced again and again:

Great businesses are intentional.

Successful businesses aren't built by simply hiring good people, adopting the right technology, or working harder. They're built through deliberate decisions about how the business operates, who it serves, what it prioritizes, and what kind of organization it is becoming.

In other words, businesses are designed.

Sometimes intentionally. Sometimes by default.

This book grew from that realization.

It isn't a collection of podcast transcripts or a guide to chasing the latest business trends. It's a collection of patterns we've identified through dozens of conversations with experienced business leaders.

Each chapter brings together lessons from multiple guests with our own observations as hosts to explore questions every business owner eventually faces:

Why does growth sometimes make business harder instead of easier?

How do I build a team that thrives?

How do I create systems that give me freedom instead of making the business more dependent on me?

How do I know whether my business is truly healthy?

How do I create an experience customers remember?

And ultimately, how do I build a business that serves my life instead of consuming it?

At the end of each chapter, we'll return to three simple questions:

Know. Feel. Do.

What do you need to understand?

How should your thinking change?

What action can you take?

Because businesses don't improve through information alone. They improve when owners make better, more intentional decisions.

Our hope is that you'll recognize your own business in these pages and see familiar frustrations differently. Many of the challenges you've accepted as "just part of owning a business" may actually be opportunities to redesign how your business works.

Every business can evolve.

Every system can improve.

And every business owner has the opportunity to make a Strategy Shift.

Let's begin.

Chapter 1: Design Before Growth

"As the business owner, it's your job to define and visualize what your future state is going to look like before you make an investment."

Christina Wrobel-Holt

Strategy Shift Podcast

If you've been in business for any length of time, you've probably heard someone say, "We just need to grow."

When sales slow, growth feels like the answer. When profits tighten, more customers seem like the solution. When workloads increase, the instinct is to hire or buy another piece of software.

But growth is rarely the place to start.

Successful business owners ask a more fundamental question:

"What are we trying to build?"

That question shifts the focus from activity to intention. Customers, employees, technology, and services stop being goals themselves and become tools for building the business you actually want.

Many organizations reverse that process. They grow first and think strategically later.

Complexity follows one decision at a time. A service is added because a customer requests it. New software solves an immediate problem. An employee takes on responsibilities that were never clearly defined.

Each decision makes sense individually. Together, they can create a business that is busy, complicated, and dependent on its owner.

Start With the Destination

Christina Wrobel-Holt often sees this problem through technology.

Businesses start searching for a new CRM, AI platform, or software solution before defining what success looks like. They expect technology to solve problems that aren't actually technical.

Christina encourages leaders to first define their **Current State** and **Future State**.

Where is the business today?

Where do you want it to be?

What stands between those two points?

The principle applies far beyond technology.

Before hiring, define the role that person will play in the future organization.

Before launching a marketing campaign, define the customer you want to attract.

Before adding a service, determine whether it strengthens the business or simply adds more work.

Define the destination before choosing the tool.

Communication strategist Steven Vito reinforced the same idea from another perspective.

Effective communication doesn't begin with writing an email, posting on social media, or publishing a newsletter. It begins by asking:

Who needs to know?

How do you want them to feel?

What action should they take?

Only then should you decide what to say and where to say it.

Different discipline. Same principle.

Start with the outcome.

Clarity Comes Before Scale

That pattern continued throughout our conversations.

Financial strategist Calvin Wilder encouraged owners to treat financial reports as decision-making tools rather than documents for accountants. Numbers don't improve a business by themselves. They reveal what's happening so leaders can make better decisions.

Leadership coach Brett Knopf emphasized clarity within teams. Employees can't consistently make good decisions if they don't understand their responsibilities or how success is measured. Strong leadership creates enough clarity for people to make good decisions without the owner.

Technology. Communication. Finance. Leadership.

Each points toward the same lesson:

Clarity precedes growth.

The businesses that scale successfully aren't necessarily the ones that move fastest. They're the ones that understand what they're building before investing in the people, technology, and processes needed to get there.

Too often, owners believe they have a growth problem when they actually have a design problem.

Growth simply reveals it.

Consider two businesses that double in size.

One has clear responsibilities, documented processes, useful financial reporting, and consistent communication. Growth creates opportunity because the foundation can support it.

The other depends on the owner to answer every question and solve every problem. Employees have their own ways of working. Financial reports are reviewed only when something feels wrong. Technology has accumulated without a clear strategy.

That business can grow too.

But more customers create more interruptions. More employees require more supervision. More revenue brings more complexity.

The difference isn't growth.

The difference is design.

Build Tomorrow's Business Today

Strategy isn't something you create once a year at an offsite meeting.

It's the discipline of making today's decisions in a way that supports tomorrow's business.

Every hire, investment, process, customer, and opportunity either strengthens the business you're building or pulls you away from it.

Intentional design doesn't require starting over. It starts with better questions:

What kind of business do you want to own five years from now?

What role do you want to play in it?

What do you want customers to say about working with you?

What decisions today will move you closer to that future?

Those questions may not generate revenue tomorrow.

But they help ensure the revenue you generate is building the business you actually want.

Know

Growth is not a strategy. It's the result of hundreds of intentional decisions. Before investing in people, technology, marketing, or expansion, define the business you're trying to build.

Feel

Confidence comes from clarity. When you understand where you're going, it becomes much easier to decide what deserves your time, attention, and investment.

Do

- Describe your ideal business three to five years from today.
 - Review one recent business decision and ask whether it supported your long-term vision or simply solved an immediate problem.
 - Identify one area where greater clarity would improve future decisions.
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Questions to Shift Your Strategy

- What are you building, beyond simply growing revenue?
 - If your business doubled tomorrow, what weakness would become most obvious?
 - Where have you added complexity instead of creating clarity?
 - What's one decision you've been avoiding because the destination isn't fully defined?
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Referenced Strategy Shift Episodes

- **Christina Wrobel-Holt, S01 E07:** *Vision First: Building Smarter Tech Strategies with Christina Holt*
 - **Steven Vito, S01 E08:** *If You Fail to Communicate, You Fail: Strategic Messaging and Market Influence with Steven Vito*
 - **Calvin Wilder, S01 E11:** *From Bookkeeping to Business Growth: Financial Clarity with Calvin Wilder*
 - **Brett Knopf, S01 E12:** *Elite Performance Without the Unicorns: Building High-Performing Sales Teams with Brett Knopf*
 - **Adam Levin and Tom Freedman, S02 E01:** *Top 5 Business Lessons from Strategy Shift Season One (2025)*
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Chapter 2: Design Your Business Around People

"If you have people, you have people problems."

Jim Camic

Strategy Shift Podcast

At first glance, Jim Camic's observation can sound discouraging. Every business owner has experienced the frustrations that come with leading people. Employees leave unexpectedly. Communication breaks down. Expectations are misunderstood. Performance varies. Conflict arises. It would be easy to interpret Jim's statement as confirmation that managing people is simply the cost of doing business.

That wasn't his point at all.

In fact, his message was far more encouraging.

People problems are inevitable because businesses are built by people. The real question isn't whether challenges will arise. It's whether your business is designed to address those challenges effectively or simply react to them as they appear.

Many business owners believe their biggest challenge is finding better employees. After listening to our guests over the years, we've come to a different conclusion.

Most businesses don't have a people problem.

They have a leadership and systems problem.

That's an important distinction because systems can be improved.

One of the recurring themes throughout the *Strategy Shift* podcast is that successful organizations create environments where people are positioned to succeed. They don't assume employees will simply "figure it out." They define expectations, establish accountability, provide the right tools, and communicate consistently.

Jim Camic described leadership as creating clarity rather than controlling every outcome. The stronger the systems become, the less often leaders find themselves solving the same problems repeatedly.

Leadership coach Brett Knopf reinforced that idea from another perspective. Great leaders don't simply direct people. They develop them.

Employees perform with greater confidence when they understand what success looks like, why their work matters, and how their contributions support the larger mission of the organization. Clarity creates confidence, and confidence creates ownership.

When those elements are missing, leaders often compensate by becoming more involved in every decision. Ironically, that approach usually produces the opposite of the intended result. Employees become increasingly dependent on the owner, while the owner becomes overwhelmed trying to keep every project moving.

Many founders unknowingly become the bottleneck in their own business.

Not because they lack capable people.

Because they haven't built a system that allows capable people to succeed independently.

That realization surfaced in a different way during our conversations about hiring.

Finding talented employees has never been easy, but hiring becomes even more difficult when organizations aren't clear about what they're truly looking for. Too often, job descriptions become lists of responsibilities instead of descriptions of the outcomes the organization expects that role to achieve.

Successful hiring begins long before the interview.

It begins with understanding the business you're building and the culture you're trying to create.

Every hire either strengthens that culture or weakens it.

Culture itself is frequently misunderstood. Many organizations describe culture as perks, benefits, or office traditions. Those things can certainly contribute to a positive workplace, but they don't define culture.

Culture is reflected in the behaviors an organization consistently encourages, rewards, and tolerates.

It is experienced in the way leaders communicate.

It is demonstrated in how problems are addressed.

It becomes visible in how employees treat one another and how customers are served.

In many ways, culture is simply the personality of the business made visible through everyday decisions.

Michelle Armato approached this idea from the customer's perspective. Her experience showed that a consistent customer experience depends on repeatable systems, clear communication, and employees who understand how the work should be done.

Employees who understand the mission, feel supported, and have the authority to solve problems naturally create better customer interactions.

The opposite is equally true.

Confused employees create confused customers.

Disconnected teams create inconsistent experiences.

No marketing campaign can consistently overcome a poor internal culture.

That doesn't mean leaders should strive for perfection. Every organization experiences conflict, miscommunication, and difficult conversations. The goal isn't eliminating every challenge.

The goal is building a business that addresses challenges consistently instead of emotionally.

That's where leadership becomes less about personalities and more about design.

The strongest organizations don't depend on extraordinary individuals to rescue them from ordinary problems. They establish hiring practices, onboarding processes, communication rhythms, performance expectations, and accountability systems that allow ordinary people to accomplish extraordinary things together.

As Adam often observed throughout our conversations, businesses frequently spend more time fixing individual problems than improving the systems creating those problems.

A missed deadline becomes an employee issue.

A dissatisfied customer becomes a service issue.

High turnover becomes a recruiting issue.

Sometimes those assumptions are correct.

More often, they're symptoms of something deeper.

Tom frequently encouraged guests to examine the process behind the problem. If the same issue appears repeatedly, it's worth asking whether the organization has unintentionally designed that outcome. Looking beyond the immediate frustration often reveals opportunities for meaningful improvement.

The businesses we admire most don't avoid people problems.

They become better at solving them.

They hire intentionally.

They communicate consistently.

They develop leaders at every level.

Most importantly, they recognize that people perform best inside organizations designed to help them succeed.

Building that kind of organization doesn't happen overnight.

It happens one intentional decision at a time.

Know

Strong businesses aren't built by finding perfect employees. They're built by creating systems, expectations, and cultures that allow good people to do their best work.

Feel

People challenges are a normal part of leadership. Rather than becoming discouraged, view them as opportunities to strengthen the systems supporting your team.

Do

- Review one recurring "people problem" in your business. Is it truly a people issue, or is it exposing a weakness in your process or communication?
- Evaluate your onboarding process. Does every new employee clearly understand expectations, responsibilities, and how success is measured?
- Identify one way you can improve communication with your team this month through greater clarity rather than more meetings.

Questions to Shift Your Strategy

- If you asked your employees to describe your culture in one sentence, what would they say?
 - Where are your people waiting for leadership when better systems could empower them to act?
 - Which recurring employee issue is really pointing to a process that needs improvement?
 - How would your customers describe the experience your team delivers every day?
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Referenced Strategy Shift Episodes

- **Jim Camic, S02 E06:** *People Problems Are Really System Problems: How Better HR Creates Stronger Culture, Performance, and Growth*
- **Brett Knopf, S01 E12:** *Elite Performance Without the Unicorns: Building High-Performing Sales Teams with Brett Knopf*
- **Michelle Armato, S02 E03:** *Why Customer Experience Wins: How Pink Zebra Moving Scales with Service, Systems, and Relationships*
- **Robyn Grable and Tobey Wyatt, S01 E02:** *Building a Winning Team: Small Business Recruitment Strategies*
- **Adam Levin and Tom Freedman, S02 E01:** *Top 5 Business Lessons from Strategy Shift Season One (2025)*

Chapter 3: Build Systems That Create Freedom

"If they ever decide to sell their business, someone is not going to buy you. They're going to buy your business."

Sevana Stone

Strategy Shift Podcast

For many entrepreneurs, success arrives with an unexpected consequence.

The business grows. Revenue increases. Customers keep coming back. New employees join the team.

Yet instead of feeling more freedom, the owner feels more responsibility.

Every important decision still lands on their desk.

Every customer issue eventually finds its way to their phone.

Every vacation requires checking email.

Every day feels like a race to keep up.

It's one of the great paradoxes of entrepreneurship. Many owners start a business to gain more control over their lives, only to discover they've created a job that's more demanding than the one they left behind.

The problem isn't success.

The problem is dependence.

A business that depends entirely on its owner can only grow as far as that owner can personally carry it.

That's why systems matter.

When people hear the word "systems," they often think about software or automation. While technology certainly plays an important role, systems are much broader than that. A system is simply a repeatable way of accomplishing work. It ensures that important tasks are completed consistently regardless of who performs them.

The best businesses don't rely on memory.

They rely on systems.

Christina Wrobel-Holt emphasized that technology should support well-designed processes rather than replace them. Organizations often invest in new platforms expecting software to solve operational problems, only to discover they've automated confusion instead of improving it.

Technology can make a good process faster.

It cannot make a poor process better.

Before implementing a new tool, leaders should first ask whether the process itself is clear, repeatable, and aligned with the organization's goals. Otherwise, technology simply allows the business to make the same mistakes more efficiently.

Tom frequently returned to this idea throughout our conversations. Every recurring problem deserves a closer look, not simply another quick fix. If customer onboarding feels inconsistent, document the process. If projects regularly fall behind schedule, examine how work is planned

and assigned. If employees continually ask the same questions, consider whether expectations have ever been written down.

Every repeated question is often a system waiting to be built.

Documentation is another area where growing businesses frequently struggle. Many owners keep critical knowledge in their heads because that's how the business has always operated. It works when the company consists of two or three people. As the team grows, however, that knowledge becomes increasingly difficult to transfer.

Processes shouldn't exist only in the owner's memory.

They should exist where everyone can access, understand, and improve them.

That doesn't require creating lengthy manuals for every task. Often, a simple checklist, workflow, or standard operating procedure is enough to provide consistency while still allowing employees to exercise good judgment.

Sevana Stone approached systems from a different perspective: business value.

One of the questions she often asks business owners is whether their company could operate without them. If the answer is no, the business may be successful, but it is also highly dependent on a single individual.

A business that relies entirely on its owner is difficult to scale, difficult to sell, and difficult to step away from.

Every system you build reduces that dependence.

Every documented process creates consistency.

Every delegated responsibility increases capacity.

Systems don't remove the human element from a business.

They free people to focus on the work that matters most.

This is especially true for leadership.

As organizations grow, leaders shouldn't spend more time answering routine questions. They should spend more time improving the systems that eliminate those questions altogether.

That shift doesn't happen overnight.

It happens one process at a time.

One documented workflow.

One delegated responsibility.

One improved meeting.

One clarified expectation.

Over time, those small improvements create a business that becomes more resilient, more valuable, and far less dependent on any one individual.

The goal isn't to build a business that can operate without people.

It's to build a business that doesn't stop operating when one person steps away.

That's what systems create.

Not bureaucracy.

Freedom.

Know

Systems create consistency. Technology, documentation, and delegation are most effective when they support well-designed processes rather than compensate for poorly designed ones.

Feel

Building systems isn't about adding unnecessary complexity. It's about creating the freedom to focus on leadership, innovation, and growth instead of solving the same problems every day.

Do

- Identify one recurring task that depends entirely on you. Document the process so someone else could perform it.
 - Review one technology platform you use. Is it supporting a clear process or replacing one that doesn't exist?
 - Ask your team which process creates the most frustration. Make improving that system your next leadership priority.
-

Questions to Shift Your Strategy

- What work in your business exists only in your head?
 - If you were unavailable for two weeks, what would stop functioning?
 - Which recurring problem could be eliminated by documenting a better process?
 - Are your systems helping your people succeed, or forcing them to reinvent the work every time?
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Referenced Strategy Shift Episodes

- **Christina Wrobel-Holt, S01 E07:** *Vision First: Building Smarter Tech Strategies with Christina Holt*
 - **Sevana Stone, S02 E05:** *Did You Build a Business or Just Create Yourself a Job? Why Small Business Owners Must Start with the End in Mind*
 - **Adam Levin and Tom Freedman, S01 E01:** *Mastering Business Growth*
 - **Calvin Wilder, S01 E11:** *From Bookkeeping to Business Growth: Financial Clarity with Calvin Wilder*
 - **Adam Levin and Tom Freedman, S02 E01:** *Top 5 Business Lessons from Strategy Shift Season One (2025)*
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Chapter 4: Know Your Numbers, Know Your Business

"You want to understand what's really driving your financial performance."

Calvin Wilder

Strategy Shift Podcast

For many small business owners, financial reports are something to review after the work is finished. Payroll has been processed, invoices have been sent, bills have been paid, and eventually the accountant delivers a stack of reports explaining what happened over the last month or quarter.

That's certainly one way to use financial information.

It's also one of the least valuable.

The strongest businesses don't use financial reports as a historical record. They use them as a management tool. Good financial information doesn't simply explain the past. It helps leaders make better decisions about the future.

Calvin Wilder challenged business owners to think differently about their numbers. Financial statements aren't created for accountants. They're created for owners. Every balance sheet, profit and loss statement, and cash flow report tells a story about how the business is performing. The question isn't whether the story exists. The question is whether the owner knows how to read it.

That's an important distinction because many businesses mistake revenue for success.

Revenue is exciting. It's easy to celebrate sales milestones and growth targets. Yet revenue alone tells only part of the story. A company can experience record sales while struggling with profitability, cash flow, or operational efficiency. Growth without financial discipline often creates more pressure instead of more opportunity.

Understanding your numbers allows you to move beyond assumptions.

Instead of wondering whether a service is profitable, you know.

Instead of guessing whether it's time to hire, you have data to support the decision.

Instead of reacting to financial surprises, you begin anticipating them.

That level of confidence changes how leaders manage their business.

Sevana Stone expanded on this idea by encouraging owners to think beyond today's income and consider the long-term value of their company. Whether you plan to sell your business, pass it on to family, or simply create greater freedom for yourself, value doesn't happen by accident.

Valuable businesses are financially healthy businesses.

They understand their margins.

They manage cash responsibly.

They document processes.

They reduce unnecessary dependence on the owner.

In other words, they are intentionally designed.

One of the most revealing questions Sevana asks business owners is simple:

One of the most revealing questions raised by Sevana's perspective is whether the business could operate successfully without its owner.

If the answer is no, that's not necessarily a criticism. It's an opportunity.

Businesses become more valuable as they become more transferable. Buyers invest in organizations with repeatable systems, predictable financial performance, and leadership teams capable of operating without constant owner involvement. Even if selling your business isn't part of your long-term plan, designing with that mindset often creates a stronger organization today.

Financial clarity also influences nearly every strategic decision a business owner makes.

Should you expand into a new market?

Can you afford another employee?

Is a new technology investment justified?

Should you continue offering a service that generates revenue but produces very little profit?

Those aren't emotional decisions.

They're business decisions.

And good business decisions require reliable information.

Throughout the *Strategy Shift* podcast, one idea surfaced repeatedly across multiple conversations. Leaders make better decisions when they replace assumptions with evidence.

Technology provides data.

Communication provides feedback.

Leadership provides perspective.

Financials provide measurement.

Together, they create a much clearer picture of organizational health.

Too often, owners wait until something feels wrong before looking at their numbers. By then, valuable time has already been lost. The strongest organizations establish a regular rhythm of reviewing performance, discussing results, and making small adjustments before small issues become significant ones.

Knowing your numbers isn't about becoming an accountant.

It's about becoming a better leader.

Because every strategic decision eventually shows up somewhere in the financial statements.

Learning to read that story is one of the most valuable leadership skills a business owner can develop.

Know

Financial reports are more than historical documents. They are decision-making tools that help leaders understand profitability, manage cash flow, evaluate opportunities, and build long-term business value.

Feel

You don't have to become a financial expert to become financially confident. Consistently reviewing the right information allows you to make decisions with greater clarity and less uncertainty.

Do

- Schedule a monthly financial review focused on understanding trends, not just reviewing numbers.
- Identify your three most important financial metrics and begin tracking them consistently.
- Ask yourself whether each major business decision is supported by financial evidence or driven by assumptions.

Questions to Shift Your Strategy

- Do you truly understand what drives profitability in your business?
- Which financial report do you review most often, and which one have you been ignoring?
- If someone asked you today what your healthiest and least profitable services are, could you answer confidently?
- What story are your numbers telling that you may have overlooked?

Referenced Strategy Shift Episodes

- **Calvin Wilder, S01 E11:** *From Bookkeeping to Business Growth: Financial Clarity with Calvin Wilder*
- **Sevana Stone, S02 E05:** *Did You Build a Business or Just Create Yourself a Job? Why Small Business Owners Must Start with the End in Mind*

- **Christina Wrobel-Holt, S01 E07:** *Vision First: Building Smarter Tech Strategies with Christina Holt*
 - **LaMichelle Hecht, CPA, MBA, S01 E09:** *Maximizing Profit and Cutting Waste: From Razor-Thin Returns to a Thriving Model*
 - **Adam Levin and Tom Freedman, S02 E01:** *Top 5 Business Lessons from Strategy Shift Season One (2025)*
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Chapter 5: Design Experiences People Remember

"You're not creating the problem. You're solving it."

Michelle Armato

Strategy Shift Podcast

Every business has competitors.

Some compete on price.

Others compete on convenience, speed, or location.

The businesses that endure, however, compete on something much harder to copy.

They create experiences people remember.

Small business owners often assume customer experience begins the moment someone walks through the door, visits a website, or picks up the phone. In reality, it begins much earlier. It starts with the promises your business makes, the expectations you set, and the consistency with which you deliver on them.

Customers don't simply buy products or services.

They buy confidence.

They want to believe they've chosen the right company to solve an important problem.

Michelle Armato reminded us that businesses sometimes become so focused on what they're selling that they forget why customers came to them in the first place.

As she put it, *"You're not creating the problem. You're solving it."*

That subtle shift changes how organizations think about nearly every customer interaction.

Customers rarely wake up hoping to hire an accountant, redesign a website, replace an HVAC system, or meet with an attorney. They reach out because they have a challenge they can't solve alone. They are looking for expertise, reassurance, and confidence that someone understands their situation.

The businesses that earn long-term loyalty recognize that they're not selling services.

They're providing solutions.

That mindset influences everything from marketing and sales to onboarding and customer support.

Steven Vito approached the same challenge through communication. Every message an organization shares should answer three simple questions: What does the audience need to know? How should they feel? What do we want them to do next?

Those questions align naturally with the **Know, Feel, Do** framework.

Customers need clarity before they can make confident decisions.

They need to feel they are working with people they trust.

And they need a clear next step.

When businesses communicate consistently, they reduce uncertainty. They remove friction from the buying process and make it easier for customers to say yes.

Communication also extends beyond marketing.

Every email.

Every proposal.

Every invoice.

Every meeting.

Every follow-up call.

Each interaction either strengthens or weakens the customer's confidence.

The experience isn't defined by one memorable moment.

It's defined by the accumulation of many small moments.

That's why culture matters so much.

Earlier in this book, we discussed how employee experience influences customer experience. Customers can feel the difference between an organization with clear systems and consistent communication and one where employees are left to improvise the experience.

Businesses don't accidentally deliver exceptional service.

They intentionally create environments where employees have the tools, authority, and confidence to serve customers well.

That consistency builds trust.

Trust builds relationships.

Relationships build referrals.

For many small businesses, referrals are among the most valuable sources of new business. They don't happen because customers were merely satisfied. They happen because customers had an experience worth talking about.

That experience doesn't require extravagant gestures.

It requires consistency.

Returning phone calls when you say you will.

Meeting deadlines.

Communicating proactively.

Owning mistakes when they happen.

Making customers feel heard.

These actions rarely generate headlines, but they build reputations that last for years.

Throughout the *Strategy Shift* podcast, Adam often reminded listeners that branding isn't simply a logo or a color palette. A brand is the promise customers believe your business will consistently deliver.

Every customer interaction either reinforces that promise or weakens it.

That's why designing a remarkable customer experience isn't the responsibility of one department.

It's the responsibility of the entire organization.

When leadership is clear, communication is intentional, and employees understand the mission, customers notice the difference.

Not because the business is perfect.

Because it's consistent.

And in today's marketplace, consistency may be one of the greatest competitive advantages a small business can have.

Know

Customers remember experiences more than transactions. Every interaction, from your first marketing message to your final follow-up, shapes how people perceive your business and whether they'll recommend it to others.

Feel

Exceptional customer experiences don't require perfection. They require consistency, empathy, and a genuine commitment to solving problems instead of simply delivering services.

Do

- Walk through your customer journey from the first point of contact to the completion of the project. Where does confusion or frustration exist?
 - Ask three recent customers what they remember most about working with your business. Their answers may surprise you.
 - Identify one small improvement that would make every customer interaction more consistent.
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Questions to Shift Your Strategy

- What promise does your brand make to every customer?
 - Does your customer experience consistently deliver on that promise?
 - Where do customers experience unnecessary friction in working with your business?
 - If your best customer described your business to a friend, what would you hope they would say?
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Referenced Strategy Shift Episodes

- **Michelle Armato, S02 E03:** *Why Customer Experience Wins: How Pink Zebra Moving Scales with Service, Systems, and Relationships*
 - **Steven Vito, S01 E08:** *If You Fail to Communicate, You Fail: Strategic Messaging and Market Influence with Steven Vito*
 - **Weston Lyon, S02 E04:** *Stop Selling, Start Positioning with a Book: How Entrepreneurs Use Books to Build Authority and Drive Revenue*
 - **Forrest Dombrow, S01 E06:** *Beyond Cold Emails: Scaling B2B Services with the PBD Growth Machine*
 - **Adam Levin and Tom Freedman, S02 E02:** *Stop Chasing Leads: Build a Referral System That Feeds Itself*
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Chapter 6: Lead the Business You Want to Own

"I really look to help these people lead themselves first and foremost so that they can lead others to their highest levels."

Brett Knopf

Strategy Shift Podcast

Every business reflects the priorities of its leadership.

Not the priorities written in a mission statement or displayed on a website, but the priorities demonstrated every day through decisions, behaviors, and expectations.

As we've explored throughout this book, businesses don't become successful because they happen to hire the right people, implement the right technology, or discover the perfect marketing strategy. Those things certainly matter, but they are outcomes of something deeper.

Leadership.

The most effective business owners recognize that they are no longer just managing customers or employees. They are designing an organization capable of thriving beyond today's challenges.

That requires a shift in perspective.

Early in a business's life, the owner often serves as the chief salesperson, technician, customer service representative, and problem solver. Those roles are necessary in the beginning. As the business grows, however, continuing to wear every hat becomes one of the greatest obstacles to future success.

The business doesn't need a hero.

It needs a leader.

Brett Knopf spoke about leadership as an inside-out process. Before leaders can inspire confidence in others, they must first demonstrate clarity, consistency, and self-discipline themselves. Teams rarely outperform the standards their leaders establish.

People pay attention to what leaders do far more than what leaders say.

If accountability matters, leaders must model accountability.

If communication matters, leaders must communicate consistently.

If continuous improvement matters, leaders must be willing to learn, adapt, and grow.

Culture begins at the top.

Throughout our conversations, another theme surfaced repeatedly. The best leaders ask better questions.

Instead of asking, *"Why isn't my team performing?"* they ask, *"Have I created an environment where success is clearly defined?"*

Instead of asking, *"Why am I so busy?"* they ask, *"What systems still depend on me?"*

Instead of asking, *"How do I grow faster?"* they ask, *"What kind of business am I trying to build?"*

Those questions shift the focus from reacting to designing.

That is the essence of leadership.

Leadership also requires the courage to let go.

Many business owners built their companies through hard work, personal sacrifice, and an unwavering commitment to quality. Letting others make decisions can feel uncomfortable because no one will ever care about the business exactly as much as the owner.

Yet refusing to delegate has consequences.

It limits growth.

It slows decision-making.

It prevents future leaders from developing.

Most importantly, it keeps the owner trapped in the day-to-day operation of the business.

The strongest leaders don't try to control everything.

They create clarity, build trust, and develop people who are capable of making good decisions on behalf of the organization.

That doesn't happen overnight.

It happens through coaching instead of rescuing.

Teaching instead of telling.

Empowering instead of controlling.

Over time, leadership becomes less about solving every problem personally and more about creating an organization that solves problems well.

That is the business every owner hopes to build.

A business where customers are well served.

Where employees understand the mission.

Where financial decisions are informed rather than reactive.

Where systems create consistency.

Where growth creates opportunity instead of chaos.

Most importantly, it's a business that supports the owner's life instead of consuming it.

That doesn't mean challenges disappear.

Owning a business will always involve difficult decisions, unexpected setbacks, and moments of uncertainty.

The difference is that intentional businesses are better prepared to navigate them.

They've invested in leadership.

They've designed systems.

They've built strong teams.

They've created a foundation that allows the organization to adapt as circumstances change.

If there's one lesson we've learned from every conversation on the *Strategy Shift* podcast, it's this:

Successful businesses don't happen by accident.

They're intentionally designed.

That design isn't completed in a weekend retreat or an annual planning meeting.

It's shaped every day through the decisions leaders make, the culture they create, the systems they improve, and the people they develop.

Every choice moves the business in one direction or another.

The question is whether those choices are intentional.

The good news is that tomorrow offers another opportunity to make a different decision.

To improve one process.

Clarify one expectation.

Develop one leader.

Strengthen one customer relationship.

Small improvements, made consistently, have an extraordinary way of transforming organizations over time.

That's the real Strategy Shift.

It's not one dramatic change.

It's the ongoing decision to build your business with purpose.

Know

Leadership shapes every part of a business. The decisions you make, the culture you create, and the systems you build ultimately determine whether your business depends on you or is strengthened by you.

Feel

You don't have to transform your business overnight. Meaningful change happens through consistent, intentional leadership and a commitment to continuous improvement.

Do

- Identify one responsibility you should begin developing someone else to own.
 - Schedule time each month to work *on* your business, not just *in* it.
 - Ask your leadership team, or yourself, one simple question: "*What kind of business are we intentionally building?*"
-

Questions to Shift Your Strategy

- If you stepped away from your business for a month, what would happen?
 - Where are you leading through habit instead of intention?
 - What leadership behavior do you need to model more consistently?
 - What is one decision you can make this week that moves your business closer to the future you envision?
-

Referenced Strategy Shift Episodes

- **Brett Knopf, S01 E12:** *Elite Performance Without the Unicorns: Building High-Performing Sales Teams with Brett Knopf*
 - **Jim Camic, S02 E06:** *People Problems Are Really System Problems: How Better HR Creates Stronger Culture, Performance, and Growth*
 - **Sevana Stone, S02 E05:** *Did You Build a Business or Just Create Yourself a Job? Why Small Business Owners Must Start with the End in Mind*
 - **Adam Levin and Tom Freedman, S01 E01:** *Mastering Business Growth*
 - **Adam Levin and Tom Freedman, S02 E01:** *Top 5 Business Lessons from Strategy Shift Season One (2025)*
-

Conclusion: Your Strategy Shift Starts Today

"You've got to be able to communicate and put processes and systems in place that can work without you."

Tom Freedman

Strategy Shift Podcast, Episode 1

Every business owner reaches a moment when they realize the next stage of growth isn't about working harder.

It's about thinking differently.

Maybe you've experienced that moment already. Perhaps it came after hiring your first employee, taking your first vacation, or realizing you had become the answer to every question in your business. Maybe it happened when you looked around one evening and wondered how something you loved building had become something that depended entirely on you.

Those moments can be discouraging.

They can also be transformational.

Throughout this book, we've explored six ideas that surfaced repeatedly in our conversations with business owners, consultants, financial experts, leadership coaches, technology strategists, and communication professionals. While every guest brought a different perspective, they consistently pointed toward the same conclusion.

Successful businesses don't happen by chance.

They are built through intentional decisions made consistently over time.

Design comes before growth.

People thrive when leaders create clarity.

Systems create freedom.

Financials tell the story of the business.

Customer experiences are intentionally designed.

Leadership sets the direction for everything else.

Individually, none of those ideas will transform a business.

Together, they become a different way of thinking.

That is the Strategy Shift.

It's the shift from reacting to planning.

From solving today's problem to building systems that prevent tomorrow's.

From measuring success by how busy you are to measuring success by how well your business operates.

From believing the business depends on you to intentionally building a business that can thrive because of the foundation you've created.

One of the greatest lessons we've learned from producing the *Strategy Shift* podcast is that every business owner faces remarkably similar challenges.

They worry about finding the right people.

They struggle with communication.

They wrestle with cash flow.

They wonder whether they're making the right investments in technology.

They question whether they're spending their time on the things that matter most.

Those challenges aren't signs of failure.

They're signs that your business is growing and evolving.

The question isn't whether you'll face them.

The question is how you'll respond.

You can continue solving the same problems over and over again.

Or you can begin improving the systems that created them.

That decision belongs to every business owner.

The encouraging news is that meaningful change rarely begins with a massive transformation.

It usually begins with one better decision.

One clearer expectation.

One documented process.

One leadership conversation.

One financial review.

One customer interaction.

One system that works just a little better than it did yesterday.

Those improvements may seem insignificant in the moment.

Given enough time, they become the difference between a business that constantly reacts and one that intentionally leads.

As we've worked through these chapters, we hope you've seen your own business in these pages. Maybe you've recognized a challenge you've been struggling with. Maybe you've discovered an idea you'll put into practice this week. Or perhaps you've simply realized that the frustrations you've accepted as "part of owning a business" are actually opportunities to improve the way your business is designed.

That's the opportunity every entrepreneur has.

Not to build a perfect business.

But to build a better one.

One decision at a time.

One improvement at a time.

One Strategy Shift at a time.

Thank You

This book was inspired by the conversations we've had with remarkable leaders on the *Strategy Shift* podcast. Every guest generously shared lessons learned through years of experience, and while we couldn't include every story or every insight in these pages, every conversation influenced the way we think about leadership and business.

To our guests, thank you for your willingness to teach, challenge, and encourage fellow business owners.

To our listeners, thank you for joining us each episode and continuing these conversations in your own businesses and communities.

And to you, the reader, thank you for investing your time in becoming a better business owner and leader.

We hope this book doesn't end the conversation.

We hope it starts one.

Continue the Conversation

The conversations that inspired this book continue every month on the **Strategy Shift Podcast**.

Join us as we explore leadership, communication, marketing, technology, finance, customer experience, organizational culture, and the practical strategies that help small businesses become stronger, healthier, and more intentional.

Because every business owner eventually reaches a point where what got them here won't get them where they want to go.

When that moment comes, don't just work harder.

Don't simply add another tool.

Don't assume growth alone will solve the problem.

Pause.

Step back.

Design intentionally.

Then move forward with confidence.

Your next chapter begins with your next decision.

Make it your next **Strategy Shift**.

Acknowledgments

Every great conversation has the power to change the way we think.

Over the past two seasons of the **Strategy Shift Podcast**, we've had the privilege of sitting down with business owners, executives, consultants, financial experts, leadership coaches, marketers, and innovators who generously shared their experience and expertise. While each conversation explored a different topic, they all had one thing in common: a genuine desire to help business owners build stronger, healthier, and more successful organizations.

This book is the result of those conversations.

Rather than simply capturing individual interviews, we've brought together the recurring themes, practical lessons, and timeless business principles that surfaced again and again. We are deeply grateful to every guest who invested their time, shared their stories, challenged our thinking, and contributed to the ideas found throughout these pages.

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Your willingness to share your knowledge has made a lasting impact on our audience and helped create a valuable resource for small business owners everywhere.

To Our Listeners

Thank you for tuning in, sharing episodes, asking thoughtful questions, and being part of this growing community. Your curiosity, feedback, and commitment to becoming better business leaders continue to inspire every conversation we have.

To the Small Business Owner

Finally, thank you.

Whether you're leading a team of two or two hundred, building a business requires courage, perseverance, and a willingness to keep learning. We hope the ideas in this book encourage you to think differently, lead intentionally, and continue building a business that serves your customers, your employees, your family, and your community.

Thank you for allowing us to be part of your journey.

Adam Levin & Tom Freedman
Co-Hosts, Strategy Shift Podcast

<https://strategyshiftpodcast.com/>

<https://defiantenterprises.com/>

<https://informationexperts.com/>

TOM & ADAM