

Becoming a Thought Leader

with Denise Brosseau

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How to Use this Workbook

Getting started

This workbook is designed to supplement this LinkedIn Learning course and the book, *Ready to Be a Thought Leader?* (Wiley, 2014), by Denise Brosseau.

Section 1: Develop Your Strategy

Worksheet 1.1 – Identify Your Niche (page 2): You will use this worksheet to identify the one arena where your interests, expertise, credibility, and commitment align your Thought Leadership Intersection Point. This worksheet is designed to help you begin to narrow and select the one niche you will commit to for this class. It doesn't mean you can't change later, but if you can choose and commit to just one, you'll move more quickly through the exercises in the videos. Don't be discouraged if you have just begun. Instead, use the questions as a guide to show you the road ahead.

Worksheet 1.2 – Define Your *What If?* Future (page 3): Now, you will begin to define your *What If?* Future (WIF). A WIF is a single, simple, striking description or image of the future you want to see. An inspiring WIF can attract followers and galvanize them to take action. Defining your WIF is an iterative process. Your goal is to craft a compelling set of words or images that enrolls other people in the future you envision.

Worksheet 1.3 – Context Map (pages 4 and 5): Understanding the context you are operating in and aligning to the trends around you will allow you to both be more effective and gain followers more quickly. Use this worksheet to think through trends, what is happening in the overall landscape, and what the uncertainties are ahead. There is an example on the following page to help guide your efforts.

Worksheet 1.4 – Who Do You Stand With? (page 6): As thought leaders, we often stand for or work on behalf of others—our tribe. These could be groups of people (e.g., children or immigrants) or entities (our community or the planet). Use this worksheet to think through who you stand for and what their key issues are, as well as who else might be standing for and working for the same tribe.

Section 2: Build Your Ripples of Influence

Worksheet 2.1 – Test Your Ideas (page 7): In order to bring about your *What If?* Future, you'll need to decide what role you will play. Use this worksheet to identify the people who will help you narrow and hone your ideas in order to select the path you will take.

Worksheet 2.2 – Message Template (pages 8 and 9): Defining a message that clearly articulates your point of view and engages people to get on board is one of the most important activities of your thought-leadership journey. Use this template to think through what you want to say and how to address the questions others might ask. There is an example on the following page to help guide your efforts.

Worksheet 2.3 – Overcoming Objections (page 10): Most thought leaders are trying to change people's mind-sets and their behaviors. To do that, we have to overcome others' objections and bring them on board. In this worksheet, we explore four different approaches to bringing people to our side.

Section 3: Codify Your Ideas

Worksheet 3.1 – Develop a Visual Framework (page 11): The essential difference between leaders and thought leaders is often the latter's ability to distill their know-how into a replicable model so that others can be inspired and empowered to expand on what they have accomplished. You will use this worksheet to begin to distill your own framework, blueprint, or methodology.

Section 4: Amplify Your Ideas

Worksheet 4.1 – Define Your Audience(s) (page 12): Researching and defining your audience(s) is the most effective way to gear your thought leadership efforts to their needs and interests. Use this worksheet to begin to define the demographics and psychographics of your audience(s) as well as their goals and challenges.

Worksheet 4.2 – Define Your Avatar (page 13): As you begin to think about spreading your message, use this worksheet to define the specific type of person within your audience(s) that you are targeting. What are their key attributes and challenges, and how will you reach them? What information sources do they rely on?

Worksheet 4.3 – Find Your Thought Leadership Brand Voice (page 14): The best brand reputation for a thought leader is being transparent, discoverable, likeable, and trusted—being someone who provides value to others. This worksheet will help you evaluate how you are doing on these and other brand characteristics.

Worksheet 4.4 – Select the Right Channels to Stand Out (page 15): There are so many channels and venues for sharing your ideas and expertise. Selecting the right one is a combination of understanding where your audiences expect to find you and identifying those that are a fit with your strategy. Then, you'll need to hone your skills to be at your best—either in written form, on video, in the press, on the stage, or online. When you can establish yourself as the credible, trusted resource, then others will look to you as the go-to person in your field or niche.

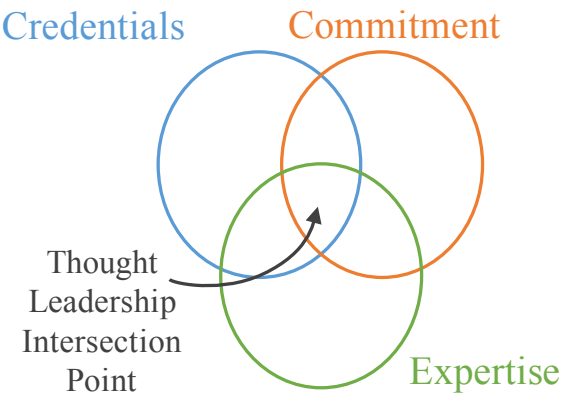
Section 5: Expand Your Influence and Impact

Worksheet 5.1 – Set Goals to Measure Your Progress (page 16): The journey from leader to well-respected thought leader does not happen overnight. We must simultaneously build our credibility, eminence, and followership. To stay motivated and on track, it's best to develop a few goal posts along the way. Use this worksheet to set your goals. Then determine how you'll know you are making headway, what support you'll need, and how you'll celebrate your progress.

Worksheet 1.1 – Identify Your Niche

Today's Date:

Use this worksheet to identify the one arena where your interests, expertise, credibility, and commitment align—your Thought Leadership Intersection Point. This worksheet is designed to help you begin to narrow and select the one niche you will commit to for this class. It doesn't mean you can't change later, but if you can choose and commit to just one, you'll move more quickly through the exercises in the videos. Don't be discouraged if you have just begun. Instead, use the questions as a guide to show you the road ahead.



| | |
|--|--|
| Credentials: What degrees or certifications have you earned? | Commitment: How have you devoted your time (e.g., hobbies, reading, serving on a committee, volunteer work, podcasts, learning trips)? |
| What brands and/or reputable companies have you worked for? | What can you speak at length about? What topic are you drawn to? |
| What industries have you worked in? What roles have you held? | Is there a real problem that you want to solve or a challenge you want to take on? |
| What classes are you taking? What are you studying? | Is there a group of people that you stand for and with? |

| | | |
|---|--|--|
| Expertise: What skills/talents do you have? | Have you built your expertise through your life circumstances or the "school of hard knocks"? That counts, too! Add details below. | Studies have shown that the hours we spend doing one thing make us the expert. Is there one thing you've done/studied for hundreds of hours? |
| Is there a topic/arena where you've become known? Do others call you to get your advice or counsel around one topic area? | | |

Worksheet 1.2 – Define Your *What If?* Future

Today's Date:

My *What If?* Future is:

Ignite:

All thought leaders need a *What If?* Future (WIF). A WIF is a single, simple, striking description or image of the future you want to see. An inspiring WIF can attract followers and galvanize them to take action.

For example:

Maria Montessori

Creator of Montessori education

How would the world change if we created classrooms where children are rewarded for independence of thinking and acting?

Robin Chase

Founder and former CEO of Zipcar, the world's largest car-sharing service, and Buzzcar, a peer-to-peer car rental company; author of *Peers Inc.*

What would the world look like if we replaced the industrial economy with a collaborative economy?

Michael Pollan

Author of *Omnivore's Dilemma: The Secrets Behind What You Eat* and *In Defense of Food*; activist; journalist

What if we thought sustainably about the food we grow and eat so that we care equally about people and planet?

What if...?

Defining your WIF is an iterative process. Your goal is to craft a compelling set of words or images that enrolls other people in the future you envision. Use the area below to test out different words or images that describe your *What If?* Future. Then test these ideas with others.

Use one or more of these questions to spark your imagination:

What future do I envision that others don't yet see?

What future am I committed to making happen?

If I could make one change in the world, it would be...

What will I work to fix or eradicate?

What legacy do I want to leave?

Worksheet 1.3 – Context Map

Today's Date:

Trends:

Aligning your efforts with emerging trends can inspire and inform your *What If?* Future (WIF). It can also help you overcome the natural resistance to change, whether in your audience, in the larger world, or in your own thinking. Which trends will you align to?

Trend:

Trend:

Trend:

Countertrends:

Being counterintuitive or the dissident voice will definitely help you stand out and get noticed. People won't necessarily agree with you, and that's fine too. Those who buck existing trends often make the most progress—they help people question the status quo and view things in a new light. Which trends will you work against?

Trend:

Trend:

Trend:

Landscape:

How is technology going to impact your efforts? At what speed will new technologies begin to have an impact? What advancements are needed to ensure your efforts will be successful?

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How does today's political landscape impact your efforts? What regulatory or legislative changes are under way?

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What economic factors are (or will) impact your efforts?

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What social trends at the local, regional, national, or global level might impact your efforts?

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Keep in mind that this is just a starting point. Regularly rethink how changing trends might impact the efforts you have underway.

What demographic trends are underway that might impact your efforts?

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-
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Uncertainty:

What uncertainty lies ahead? How might that impact your efforts?

Trends:

Aligning your efforts with emerging trends can inspire and inform your *What If?* Future (WIF). It can also help you overcome the natural resistance to change, whether in your audience, in the larger world, or in your own thinking. Which trends will you align to?

Trend: **Future of work/gig economy**

40% of workers will not be employed in a company by 2020. Thus, being discoverable is critical to being hired.

Trend: **Growth of tools/platforms/medium**

There are increasingly more tools and opportunities to create your own voice online and establish your expertise.

Trend: **Distrust of the media**

As established media voices lose credibility, there will be more chances for individuals to build their own following and establish trust online.

Countertrends:

Being counterintuitive or the dissident voice will definitely help you stand out and get noticed. People won't necessarily agree with you, and that's fine too. Those who buck existing trends often make the most progress—they help people question the status quo and view things in a new light. Which trends will you work against?

Trend: **Everyone can be a thought leader**

Disagree with this. Thought leaders are change agents who create a following to scale good ideas and bring about sustainable change.

Trend: **Thought leadership requires a social media presence**

Disagree with this—many ways to establish yourself as a thought leader without going online (e.g., speaking, writing, convening events).

Trend: **Organizations don't need to be thought leaders**

Now that trust in institutions is so low, organizations must use thought leadership to rebuild trust.

Landscape:

How is technology going to impact your efforts? At what speed will new technologies begin to have an impact? What advancements are needed to ensure your efforts will be successful?

- Growth and diversity of social media tools and platforms will be increasingly challenging for people to keep up with.
- Writing and distributing quality content and getting notice above the noise will get increasingly harder.
- As jobs get automated, standing out from the crowd will count.

How does today's political landscape impact your efforts? What regulatory or legislative changes are under way?

- Distrust of the media is getting worse. This is an opportunity and a challenge.
- As budgets for arts/science/education get cut, it will be increasingly important for these folks to build their own followers to gain \$\$.
- As established media voices lose credibility, there will be more chances for individuals to build their own following and establish trust online.

What economic factors are (or will) impact your efforts?

- If the economy goes into a tailspin, it is hard for people to focus on thought leadership efforts; yet increasingly important to do so.
- Funding for thought leadership in organizations may decrease with a bad economy. People get more focused on sales rather than having a point of view or a fresh perspective.
- In a bad economy, it would be harder for my clients to monetize their expertise through books, speaking, consulting.

What social trends at the local, regional, national, or global level might impact your efforts?

- Companies need to gain trust; thought leadership helps them do so.
- Building social/political/economic movements requires thought leadership skills.
- As more people get online, there will be an increase in understanding that having a voice and point of view helps you connect with new markets, new customers and also make change in the world.

Keep in mind that this is just a starting point. Regularly rethink how changing trends might impact the efforts you have underway.

What demographic trends are underway that might impact your efforts?

- Growth of millennials in the workplace will lead to more comfort with social media and more understanding of the value of having a public voice.
- As the leadership of companies includes more members of the digital generation, this may lead to more comfort with having an established voice and presence for organizations, too.

Uncertainty:

What uncertainty lies ahead? How might that impact your efforts?

The new administration's budget priorities, saber rattling, and general disdain for experts and the media creates an uncertain time for my clients, my ideas, and the work I care about.

Will companies be willing to spend money to develop their staff as thought leaders?

People may be concerned that taking a stand and positioning themselves with a distinct point of view is dangerous for themselves and their organization because of trolls and online backlash. Have to be able to prove otherwise.

Changes in Facebook, Huffington Post, Twitter are leading to less power and less prominence of new voices and fresh ideas. People are in their bubbles and it is harder to change people's minds. Thought leadership may become more needed than ever or less relevant.

Your tribe:

As thought leaders, we often stand for others, working on their behalf. This could be for a literal group of people (e.g., children, immigrants), or we could work on behalf of our community, city, state, country, or even the planet. Think about who or what you stand with and for.

Group/entity 1:

Group/entity 2:

Group/entity 3:

Issues/needs:

Often, the tribe we are representing or speaking for has a few key issues that matter most. What are the key issues for your tribe?

Issue/need:

Issue/need:

Issue/need:

Representatives of my tribe:

We can be far more effective when we are working for or on behalf of specific individuals rather than for an amorphous group/entity. Is there someone you know or could get to know that is a representative of the tribe you want to represent? [Note: This is not always possible, but do your best to select a representative of each group/entity on the left.]

Representative:

Representative:

Representative:

Followers

Those who might want to engage with us and become followers of our ideas may be members of our tribe, but they may also be representatives of a much broader group of people. What other groups might be attracted to your work?

Group/entity 1:

Group/entity 2:

Group/entity 3:

Others serving my tribe:

To bring about our *What If?* Future usually requires us to work with others, aligning our efforts in order to make a real impact. Who else might be working on behalf of your tribe? Think broadly—there could be people or organizations working in adjacent fields that you could align with as well as those who are working in your exact niche that you could collaborate with or learn from.

Individual:

Individual:

Group/organization:

Group/organization:

How might you align with the efforts they have underway?

Keep in mind that this is just a starting point. Regularly revisit this worksheet as you expand your knowledge and connections.

After you've selected your niche and crafted your What If? Future, now you have to decide what role you will play in bringing this future about. To do that, you'll engage with stakeholders who can help you identify and narrow your options until you find one that feels "just right". To use this worksheet, start on the right and draft three possible options. Then, below, think through who you can test your ideas with. Who might help you hone your ideas and message, and even help you get started?

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| Champions (Who might put their reputation on the line for you and your efforts?) | Inner circle (Who can you trust to help you craft your message and strategy?) | Allies (Who is ready and willing to roll up their sleeves and do the heavy lifting?) |
| Colleagues (Whose efforts are aligned with yours?) | | Adversaries (Who disagrees with you or is working against you?) |

What are three ways you might bring about your *What if* Future?

For example, are you building a new product, service, curriculum, company, nonprofit, event, or community? Are you adopting a framework from another industry? Replicating something someone else has already done? Identify three options to explore, test, and iterate with others and what questions you need to answer before you choose between them.

Option 1:

Option 2:

Option 3:

Worksheet 2.2 – Message Template

Today's Date:

| | | |
|---|---|--|
| <p>Issue</p> <p><i>Defining a message that clearly articulates your point of view and engages people to get on board is one of the most important activities of your thought-leadership journey. Use this template to think through what you want to say and how to address the questions others might ask. There is an example on the following page to help guide your efforts.</i></p> <p>What idea are you or your team trying to communicate?</p> | <p>Audiences</p> <p>Who are your audiences/constituencies?</p> <p>Why should your target audience(s) get involved?</p> <p>Why might your target audiences not get involved?</p> | <p>Spoken message</p> <p>What are the top three key messages that you or your team wants to convey? For each message, what are the proof points (research, data, past successes, user stories) that clarify and verify what you are saying?</p> <p>First message:</p> <p>Proof points:</p> <p>Second message:</p> <p>Proof points:</p> <p>Third message:</p> <p>Proof points:</p> |
| <p>Summary</p> <p>Summarize the idea in one sentence:</p> | <p>Influencers</p> <p>What stakeholders or constituencies influence your audiences?</p> <p>Who has to be on board for your stakeholders or constituents to believe in or begin to align with your efforts?</p> | <p>Frequently asked questions (FAQs)</p> <p>What questions are people likely to ask? What objections will they have to you or your team's ideas or point of view? What are the best responses to those questions?</p> |
| <p>Objective</p> <p>Why are you or your team trying to increase awareness of this idea? What do you want to occur as a result of raising awareness?</p> <p>Unspoken message</p> <p>What are you or your team trying to convey without saying it out loud? This is the hidden or underlying message to your communication that may not be as widely accepted if you put it in so many words.</p> | <p><i>Keep in mind that this is just a starting point. Regularly rethink your messaging and how changing circumstances might impact how it is received.</i></p> | |

Worksheet 2.2 – Message Template

Note: This was our template when the organization I started, the Forum for Women Entrepreneurs, co-hosted the first Springboard Venture Conference in Silicon Valley in 2000 for women entrepreneurs.

Today's Date:

| | | |
|---|---|---|
| <p>Issue</p> <p><i>Defining a message that clearly articulates your point of view and engages people to get on board is one of the most important activities of your thought-leadership journey. Use this template to think through what you want to say and how to address the questions others might ask. There is an example on the following page to help guide your efforts.</i></p> <p>What idea are you or your team trying to communicate?</p> <p>Women entrepreneurs receive less than 3 percent of the venture capital funding in the United States. This is primarily due to their lack of access to fundraising information, role models, and resource providers, as well as connections to funding sources. The Springboard Venture Conference will be the first venture conference exclusively for women entrepreneurs. It will provide a select group of twenty-five women running life science and technology companies with three months of coaching on their businesses, and then provide them access to the top angel and venture investors in the United States.</p> | <p>Audiences</p> <p>Who are your audiences/constituencies?</p> <p>Investors, bankers, lawyers, accountants, and others who are part of the ecosystem of entrepreneurial businesses, as well as women entrepreneurs who might apply to participate in the program.</p> <p>Why should your target audience(s) get involved?</p> <p>Investors will find companies to invest in. Bankers, lawyers, and accountants will find potential clients. Women entrepreneurs will find the resources and training they need to be successful, as well as media attention for their businesses. All of the participants will be a part of changing the road map for women entrepreneurs.</p> <p>Why might your target audiences not get involved?</p> <p>Women have not traditionally sought or received venture capital; it is hard to break into the "old boys' network" of venture capital; "this has never been done before" thinking.</p> | <p>Spoken message</p> <p>What are the top three key messages that you or your team wants to convey? For each message, what are the proof points (research, data, past successes, user stories) that clarify and verify what you are saying?</p> <p>First message:</p> <p>Sponsored by [a list of top sponsors], FWE, and the National Women's Business Council (NWBC), Springboard is the first venture conference for women entrepreneurs.</p> <p>Proof points: Data about the history and successes of FWE and NWBC.</p> <p>Second message:</p> <p>The time for this event has come; women are poised to grow large, successful businesses if provided the right capital and support.</p> <p>Proof points: Data and statistics about the growth and potential of women entrepreneurs.</p> <p>Third message:</p> <p>There are many great funding opportunities among the presenters; each one has been screened, vetted, and prepped to grow.</p> <p>Proof points: Showcase the stories and past successes of the 27 women selected for the conference; highlight the unique process of selection.</p> |
| <p>Summary</p> <p>Summarize the idea in one sentence:</p> <p>Springboard is the first venture conference for women entrepreneurs and will provide all of the resources needed to overcome women's barriers to raising venture capital for their businesses.</p> | <p>Influencers</p> <p>What stakeholders or constituencies influence your audiences?</p> <p>This would have included a list of all of our sponsors, advisory committee, and funders—all big brand names that everyone had heard of.</p> <p>Who has to be on board for your stakeholders or constituents to believe in or begin to align with your efforts?</p> <p>The key players in the ecosystem—the banks, law firms, accounting firms, and the top investment funds—must be involved for this event to be credible. It needs to be hosted at a well-known location, preferably at a prominent company's headquarters. Pre-event media coverage needs to be from top-name publications. Brand has to look fresh and high quality.</p> | <p>Frequently asked questions (FAQs)</p> <p>What questions are people likely to ask? What objections will they have to you or your team's ideas or point of view? What are the best responses to those questions?</p> <p>Here I would include the answers to questions like:</p> <p>Why should I support Springboard? Has a program like this been done before?</p> <p>Why aren't you doing a co-ed event?</p> <p>How did you select the women who are presenting?</p> <p>What investors are involved?</p> <p>What sponsors are involved?</p> <p>How much does it cost?</p> <p>Can I attend?</p> |
| <p>Objective</p> <p>Why are you or your team trying to increase awareness of this idea? What do you want to occur as a result of raising awareness?</p> <p>The mission of the Forum for Women Entrepreneurs (FWE) is to increase the success of women who start and lead venture-fundable businesses.</p> <p>The Springboard event will be cohosted by FWE and the National Women's Business Council and will raise awareness of our organization and the issues we care about, and improve the statistics of women raising venture funding.</p> <p>Unspoken message</p> <p>What are you or your team trying to convey without saying it out loud? This is the hidden or underlying message to your communication that may not be as widely accepted if you put it in so many words.</p> <p>No one believes women entrepreneurs are building, or are capable of building, venture-fundable businesses, and we are going to prove them wrong.</p> | <p>Keep in mind that this is just a starting point. Regularly rethink your messaging and how changing circumstances might impact how it is received.</p> | |

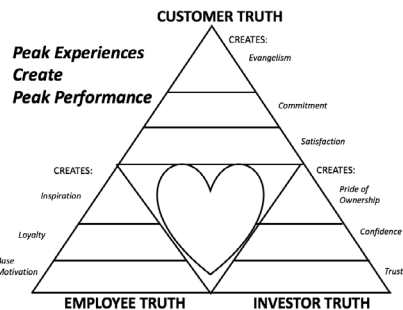
Worksheet 2.3 – Overcoming Objections

Today's Date:

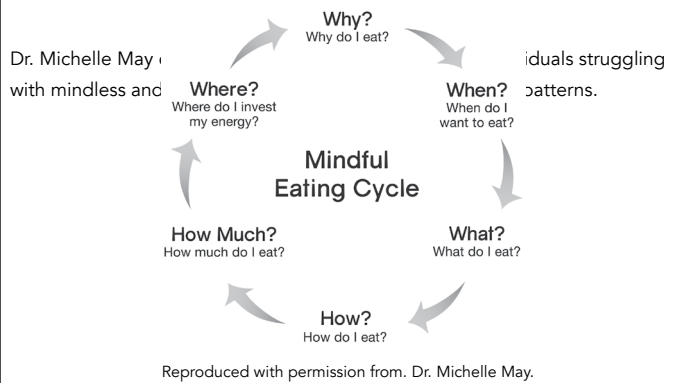
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| <p><i>Most thought leaders are trying to change people's mindsets and their behaviors. To do that, we have to overcome others' objections and bring them on board. Use this worksheet to begin to think through how you'll go about this in the weeks and months ahead.</i></p> | <p>Point of view:</p> <p>Your point of view is a combination of your attitude, perspective, beliefs, and feelings. Others who share your point of view will likely become your followers. Use the space below to outline your point of view and who might share your perspective and who might not.</p> | <p>What are the potential flaws in your argument? (To be sure...)</p> <p>When you acknowledge the potential flaws in your own argument or address any obvious counter-arguments up front, people know you can see both sides while still having a clear point of view. You'll also be less on the defensive when others begin to poke holes in your ideas. Below, jot down a few potential flaws or counter-arguments and how you will acknowledge and address them.</p> |
| <p>Why might people disagree with me?</p> <p>Research shows that if we don't honor and respect where people are today, we will never bring them over to our side. This starts with empathy and understanding rather than shame and ridicule. Take a moment to think about why people might disagree with you or be working against your goals.</p> | | |
| <p>Assess your language:</p> <p>Sometimes we can push people away with the language we use. When we choose to be inflammatory or focus on being right versus being effective, we can lose potential supporters. Think about what neutral language you could use to show that you respect people who disagree with you.</p> | <p>Topics to avoid:</p> <p>Another way we can push people away is by bringing up hot-button topics that are unrelated to our work. What hot-button topics will you avoid in order to assure the most followers for your work? (Examples: politics, religion, etc.)</p> | |

The essential difference between leaders and thought leaders is often the latter's ability to distill their know-how into a replicable model so that others can be inspired and empowered to expand on what they have accomplished. Not every framework, methodology, or set of best practices will lend itself to a graphic, pictorial, or visual representation, but if you can find a way to represent your ideas in a simple, visual way, you'll go a long way toward engaging followers and explaining your ideas. Most people are visual learners—they learn more quickly with their eyes than their ears. Think of yourself as a visual storyteller: you can show as well as tell others your ideas.

Chip Conley, founder and former CEO of Joie de Vivre Hotels, developed a detailed framework based on Maslow's Hierarchy of Needs, which guided his actions as he turned his hotel business around in the midst of a downturn. This is a simplified version of that framework.



Reproduced with permission. Chip Conley, PEAK: How Companies Get Their Mojo From MaGreat slow, Wiley.



List the steps:

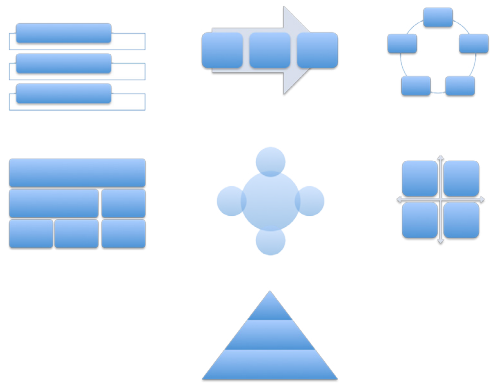
In the space below, list the steps or elements in the framework you would like to depict.

Test, test, test:

Use the space below and the back of this worksheet to draw out a few ideas and then test those images with different people—those who already know what you're talking about and those who don't. Which images do people respond to? This is an iterative process that takes tweaking. (Alternatively, hire a graphic artist you know or hire one through an online marketplace of freelance designers, such as Upwork).

Select an image:

Are the steps listed above best depicted as a list, process, or cycle? As a hierarchy, as items in relationship to one another, or in a matrix? Or would a pyramid be best? For inspiration, look at the SmartArt menu in PowerPoint which has a huge variety of options, or use your favorite search engine to look for existing images of frameworks or methodologies.



Name, document, and protect:

Once you're satisfied that you have the right framework, find a great name for it, create some documentation to explain it and how it might be used and then think about how you might protect it (e.g., copyright). Use this space to jot down next steps.

Worksheet 4.1 – Define Your Audience(s)

Today's Date:

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|---|--|---|
| <p><i>Researching and defining your audience(s) is the most effective way to gear your thought-leadership efforts to their needs and interests. You may have several different target audiences that have little overlap or there might be only subtle differences between the audiences you are targeting. Use these questions to guide your research; use multiple sheets as needed. Skip questions that don't apply.</i></p> | <p>Goals:</p> <p>What are their aspirations? What are they hoping to achieve?</p> | <p>Message that resonates:</p> <p>What messaging/language/story will best speak to their needs? How will you get them to take action?</p> |
| <p>Audience:</p> | | |
| <p>Key characteristics:</p> <p>What are the key identifiers of this audience? How do you differentiate this audience from other groups?</p> | <p>Challenges</p> <p>What stands in their way to achieving these goals? What keeps them up at night?</p> | <p>Objections:</p> <p>Identify the most likely objection this audience will have to your message or to getting involved with your organization or your efforts?</p> |
| <p>Background/demographics:</p> <p>What is their personal and/or professional background? What is their typical lifestyle, interests, hobbies, and education? What is their age range, gender, household income? Where does they live (e.g., urban/suburban/rural)?</p> | <p>How you help:</p> <p>In what ways do you help them overcome their challenges and/or achieve their goals? What's in it for them to be involved with your efforts?</p> | <p>Influencers:</p> <p>Who is in this person's ecosystem? Are they in a big organization or isolated? Are they leaders in their world, or not? And who do they look to for information? Who do they trust?</p> |

Worksheet 4.2 – Define Your Avatar(s)

Today's Date:

Once you have identified the audience(s) you'd like to target, think about a specific person (either someone you know or know about) that exemplifies this audience. Do you have an existing client, customer, colleague, champion, or stakeholder that is a good representative? Are they typical of others that you might want to attract, engage with, or serve? If so, then they would be a good example to use as an "avatar" to represent the whole group. If not, do some research, ask others for possible recommendations of possible candidates. Once you've identified someone to be your avatar, complete the description below. The more details you know or can find out about this person, the better. Use multiple sheets as needed. Skip questions that don't apply.

Add a descriptive name and image that brings them to mind.

Name:

Age/range:

Position/role:

Type of organization:

Describe them

What interest, behavior or habit makes them unique and memorable?

Key attributes

What key attributes define them? Why are they the representative you've selected to be your avatar?

Information sources

What do they read/watch/listen to?

What are their top three challenges?

How do you help?

Worksheet 4.3 – Find Your Thought Leadership Brand Voice

Today's Date: _____

Creating your own one-of-a-kind brand “personality” allows you to stand out from the crowd and be recognized and remembered. For example, if you position your brand as straight talk, people will come to rely on you to give them the real scoop. Think about your own brand profile and mark where you will position yourself along each continuum. Then, think about your key “competitors” and mark what position they have staked out. How does that inform your efforts moving forward?

| | | |
|--|---------|---------------------------------------|
| Informative/ educational | ←—————→ | Inspiring |
| Friendly/ approachable | ←—————→ | Professional/ clinical/scientific |
| Whimsical/funny | ←—————→ | Oh so serious |
| Share lessons learned/mistakes | ←—————→ | We have it all figured out |
| Storytelling/ case studies | ←—————→ | Nothing but the facts |
| Clarify/simplify define how to | ←—————→ | Lots of jargon/ for insiders only |
| Humble/share the credit | ←—————→ | Authoritarian/we own the truth |
| Cross-pollinate from other disciplines | ←—————→ | Narrowly focused in one discipline |
| Other: _____ | ←—————→ | Other: _____ |
| (Define your own) | | (Define your own) |

Additional questions to consider

The best brand reputation for a thought leader is being transparent, discoverable, likeable, and trusted—being someone who provides value to others.

How will you portray these characteristics?

What issues will you weigh in on that will reinforce your brand positioning?

What issues will you avoid commenting on in order to maintain your brand positioning?

Who are your “competitors”?

As you stake out your own brand positioning, you are often being compared or evaluated against others who are better known by your tribe. Who are the key “competitors” that play in your space?

There are multiple venues for sharing your ideas and expertise. Selecting the right one is a combination of understanding where your audiences expect to find you and identifying those that are a fit with your strategy. Then, you'll need to hone your skills to be at your best—either in written form, on video, in the press, on the stage, or online. When you can establish yourself as the credible, trusted resource then others will look to you as the go-to person in your field or niche.

Set your strategy

What is your plan of action that will help you achieve your overall aim? Select from the options below or write your own.

Validate: Regularly test and validate my ideas.

Replicate: Train and encourage people to carry my ideas to others.

Change minds: Provide information and stories that will engage others to adopt new perspectives.

Build followership: Increase the number of people who follow me.

Learning community: Build a community of followers that learns from each other and shares ideas regularly.

Expand reach: Connect to a broader audience in my organization, community or within the general public.

Gather stories: Create connections with my tribe in order to gather their stories or testimonials.

Build trust: Showcase my expertise and add value in ways that build my credibility and increase trust.

Find advocates: Connect with the most well-known and respected thought leaders in my industry or niche.

Stay top of mind: Regularly reconnect with people who might need my expertise or can refer me to others.

Add our own: _____

Select your communication channels

Strategy #1: _____

Select one strategy and think about which channels/venues (e.g., Facebook, YouTube, personal blog) might best allow you to achieve this.

-
-

Which one or two of these channels/mediums do you feel most comfortable in (e.g., speaking, videos, social media)?

-
-

What skills will you need to develop or hone in order to be most effective in this channel or venue?

-
-

What resources/tools/consultants might you use to help?

-
-

How will you get started? What's one small step you can take today?

-
-

Strategy #2: _____

Select a second strategy and think about which channels/venues (e.g., Facebook, YouTube, personal blog) might best allow you to achieve this.

-
-

Which one or two of these channels/mediums do you feel most comfortable in (e.g., speaking, videos, social media)?

-
-

What skills will you need to develop or hone in order to be most effective in this channel or venue?

-
-

What resources/tools/consultants might you use to help?

-
-

How will you get started? What's one small step you can take today?

-
-

Learn from your "competitors"

Sometimes the best way to devise a winning strategy is to see what others are doing and work to imitate them.

Where do your "competitors" tend to be found online?

-
-
-

What actions do they take that get them the most engagement?

-
-
-

Where do your "competitors" tend to engage with their communities?

-
-
-

What conferences/events do your "competitors" attend or keynote?

-
-
-

Worksheet 5.1 – Set Goals to Measure Your Progress

Today's Date:

| | | |
|--|--|---|
| <p>Setting goals</p> <p>The journey from leader to well-respected thought leader does not happen overnight. We must simultaneously build our credibility, eminence, and followership. To stay motivated and on track, it's best to develop a few goal posts along the way. Select up to three goals from the list below that you will track moving forward. Then determine how you'll know you are making headway, what support you'll need, and how you'll celebrate your progress.</p> <p>Email list: Grow the number of people on my email list.</p> <p>Followership: Grow the number of people following me online.</p> <p>Attendees: Grow the number of people attending my talks or events.</p> <p>Audiences: Increase the number of speaking engagements, types venues and types of audiences I speak with.</p> <p>Amplify others: Amplify the efforts of others in my niche by sharing their ideas and content.</p> <p>Being amplified: Others are commenting on, quoting, and sharing my content online and off.</p> | <p>Goal #1:</p> <p>Select your first goal from those on the left (or write your own) and describe how you will know you are making progress.</p> <ul style="list-style-type: none"> • • • <p>What support might you need?</p> <ul style="list-style-type: none"> • • • <p>How will you celebrate your progress?</p> <ul style="list-style-type: none"> • • • | <p>Goal #2:</p> <p>Select your first goal from those on the left (or write your own) and describe how you will know you are making progress.</p> <ul style="list-style-type: none"> • • • <p>What support might you need?</p> <ul style="list-style-type: none"> • • • <p>How will you celebrate your progress?</p> <ul style="list-style-type: none"> • • • |
| <p>Stories: I have well-honed success stories and testimonials that serve as proof points.</p> <p>Advocates: I have well-placed advocates who speak on my behalf.</p> <p>Personal board: I have a network or personal board of directors that supports me.</p> <p>Press coverage: I am quoted or mentioned in the press.</p> <p>Adoption: My framework or ideas are being quoted, cited, and adopted by others.</p> <p>Engagement: My followers are engaged and expanding the community through their efforts.</p> <p>Referrals: People I know refer others to me regularly.</p> <p>Money: I am making money with my ideas and expertise.</p> <p>Add your own:</p> | <p>Goal #3:</p> <p>Select your first goal from those on the left (or write your own) and describe how you will know you are making progress.</p> <ul style="list-style-type: none"> • • • <p>What support might you need?</p> <ul style="list-style-type: none"> • • • <p>How will you celebrate your progress?</p> <ul style="list-style-type: none"> • • • | <p>Tools:</p> <p>There are a lot of tools for measuring your progress and tracking activity in your niche. Here are a few you might explore:</p> <p>Google Alerts: Track mentions of any word or phrase, including your name, niche, key phrases, etc.</p> <p>Google keywords: Use to identify and track keywords that are popular in your niche.</p> <p>Epictions: Find out who is talking in your niche and what topics are getting shared.</p> <p>Klout: See how you rank among the experts in your field and identify experts to follow.</p> <p>LinkedIn Social Selling Index: See how LinkedIn ranks your brand, network, and engagement.</p> <p>Hootsuite: Track social mentions of your name or your Twitter or other social handles.</p> |