

# KNOW FIRST

## *Step Zero*

### More or Different? — Your life.

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Before you begin — a check-in.

This form asks real questions. Not business-plan questions. Not “where do you see yourself in five years” questions. Questions about what’s actually true right now — about your direction, your foundations, your capacity for change, and the honesty that makes the work land.

So before you start: Are you open to being honest — even if it’s uncomfortable? Are you willing to write what’s real, not what sounds good? Are you receptive to discovering something you didn’t expect? If yes — write what is true. The messy version is the useful one. If not yet — that’s honest too. Come back when you’re ready.

*If you are honest, open, and complete about where you are, we can meet you there. If you perform, we will both waste time.*

The questions below are designed to surface what is actually happening. There are no right answers. There are only honest ones — and those are the ones that make the difference.

Complete what you can. If a question stops you, write what comes to mind and move on. We will use your answers to shape the work, not to judge them. The quality of your answers here is the first indicator of the quality of the results that follow.

Take your time. Most people finish in fifteen to twenty minutes. Some take longer. Both are fine.

*Your answers are held in confidence and shared only with your assigned advisory team. We do not store or share your information beyond the scope of this engagement. This form is not a contract — it is an intake document. No commitments are created by filling it out.*

Step Zero v3.0 | Individual | February 2026

## 1. Direction & Identity

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### What are the top 3 questions you most want answered right now?

*Not topics. Questions. The ones that sit behind your eyes at 2am. The ones you haven't said out loud yet.*

1.

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2.

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3.

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### Do you want more of what you have — or something different?

*This is the first fork. More means the life is right but the volume is wrong. Different means something fundamental needs to shift. Be honest about which one it is.*

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### In one sentence: what is the change you are seeking?

*Not the background. Not the context. The change itself. If you can't name it yet, describe what you want to feel different when you wake up on a Monday.*

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### How do you want to be known — by the people who matter most?

*Not your LinkedIn headline. The sentence your closest friend would use to describe what you do and why it matters. The one that makes you feel seen.*

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### Why does this change matter — not to your career, not to your organisation, to you personally?

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*The version you would tell someone who has known you for twenty years, over a glass of something honest, with no audience.*

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**What's the version of your work you haven't started yet?**

*The thing you keep circling back to. The version that lives in the margins of your notebook. The one that isn't constrained by someone else's brief or your own fear of what it would mean to actually begin.*

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*The next section asks about foundations — the things that are true regardless of what happens next. These questions ask more of you. Take your time.*

## 2. Bedrock & Purpose

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Before we talk about where you are going, we need to name where you stand. Bedrock is the irreducible foundation — the work, the result, the proof that cannot be taken away regardless of what happens next.

### What can you always rebuild from?

*The thing at the bottom of everything. The skill, the knowledge, the lived experience that would still be yours if the title disappeared, the company closed, and the industry changed. If your best friend had to describe what makes you, you — what would they say without hesitating?*

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### What are you here to serve?

*Not the polished version. Not the one on the website. The honest answer to ‘what would the world lose if you stopped?’ It might be a person, a cause, a standard, or a feeling you create in a room. Name the thing you’d be doing even if nobody paid you.*

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### What proof exists that you’re good at what you do?

*Not credentials. Evidence. The project that worked when it shouldn’t have. The client who came back three times. The thing someone said about your work that you carry quietly. The results that are true whether or not anyone is watching.*

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### What would your life look like if you could change anything about how the world works?

*No constraints. No logic. No ‘but that’s not realistic.’ What would actually be different — in your morning, in your work, in the way people treat each other? This connects to purpose, not planning. Let it breathe.*

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### 3. What Success Looks Like

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#### What would make this year a 10 out of 10 — for your life?

*Not a fantasy. Not a moonshot. An honest 10. The version that starts from here, with what you actually have, and ends with you looking back thinking ‘that was the year it changed.’ What specifically would need to be true?*

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#### What is the cost of not changing — in twelve months, in five years?

*Name it specifically. Not ‘things will get worse.’ What does worse look like on a Tuesday afternoon? What does it cost your health, your relationships, your sense of yourself? Vague costs produce vague urgency.*

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#### What return would you need to make change worthwhile?

*Financial, professional, personal — all of the above. What would you need to see, feel, or have in your hands to know the investment of time and honesty paid off? Name what worthwhile actually means to you, not what it’s supposed to mean.*

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#### What are the 3 non-money things that define worthwhile for you?

*Freedom, respect, health, time with your kids, creative expression, the feeling of being good at something that matters — what are yours?*

1.

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2.

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3.

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**What does success look like for this process?**

*What will you see, feel, or have in your hands that tells you this was worth your time? Be specific enough that you'd recognise it if it showed up.*

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## 4. Your Change Budget

Change requires more than financial investment. It requires time, energy, attention, and the capacity to recover from setbacks. Most people overstate their budget at the start — not because they are dishonest, but because they have never been asked to measure it.

Score each dimension honestly. Your total shapes where we start — not whether we start.

DIMENSION	WHAT WE ARE ASKING	SCORE
<b>TIME</b>	How much time can you genuinely give to this work? 1 = no time at all. 10 = wide open.	/10
<b>ENERGY</b>	What is your current energy level? 1 = running on empty. 10 = fully resourced.	/10
<b>ATTENTION</b>	How fractured is your focus right now? 1 = pulled in every direction. 10 = clear and undivided.	/10
<b>RECOVERY</b>	When setbacks happen, how quickly do you regroup? 1 = setbacks derail me. 10 = I adjust and keep moving.	/10
	<b>TOTAL</b>	<b>/40</b>

### Time — in real numbers

*How many hours per week — or per fortnight — can you realistically commit? Not aspirationally. Based on your life as it is right now. Include the unit (e.g. '30 minutes a fortnight' or '3 hours a week').*

### Energy — tell us more

*What is currently draining your energy? What restores it? Are you getting enough of the second one?*

### Attention — tell us more

*List the things competing for your focus right now. Be exhaustive. Hidden commitments become hidden constraints.*

## Recovery — tell us more

*Change involves setbacks. What does your recovery pattern look like? Do you regroup and adjust, or do you stall? What support do you have around you?*

SCORE	ZONE	WHAT IT MEANS FOR WHERE WE START
<b>30–40</b>	<b>GREEN</b>	Full change capacity. Can pursue ambitious change initiatives across multiple streams.
<b>20–29</b>	<b>AMBER</b>	Moderate capacity. Choose one stream of change and protect it. Stabilise before adding.
<b>10–19</b>	<b>RED</b>	Limited capacity. Stability path only. Stabilise what you have before building anything new.
<b>Below 10</b>	<b>STOP</b>	Recovery needed before any change work begins. We will tell you this honestly.

*This is not a gate that excludes you. It is a compass that determines where we start. A Red score means we start with stabilisation. A Green score means we can move faster. Both are valid starting points.*

## 5. Constraints & Context

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### What things about your life must stay the same as you go through this change?

*Non-negotiables. The relationships, the commitments, the values, the geography that cannot move — even if everything else can. These aren't obstacles. They're the edges of the field you're playing on.*

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### What are you tolerating that you've stopped noticing?

*The compromise you made three years ago that was supposed to be temporary. The thing that drifted and stayed drifted. The thing your partner can see but you've stopped mentioning.*

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### What have you already tried in relation to this change?

*This isn't about what failed. It's about what you learned. The course you took, the coach you hired, the conversation you had, the thing you started and stopped. Be specific — what happened, and what did it teach you?*

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### What have you already invested — time, energy, attention, money — or all of the above — in trying to solve this?

*Not to qualify you financially. To understand what this change has already cost you — and what it means that you're still looking.*

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### What has prevented you from achieving this change so far?

*If the answer is 'nothing has worked' — go one level deeper. Was it timing? Resources? The wrong people? The wrong version of the question? Or something you haven't named yet?*

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### Who else is affected by this change — and do they know you are seeking support?

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*Partner, children, business partners, team, clients. People affected by your change become part of it — whether you include them or not. Who needs to know, and who already does?*

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**Who in your life actively supports this change — and have you told them?**

*Support is different from awareness. Name the people who are genuinely in your corner — the ones who'd show up at short notice, not just wish you well from a distance.*

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## 6. Honesty & Accountability

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**On a scale of 1–10, how honest, open, and complete are you prepared to be in this work?**

*Not how honest you think you should be. How honest you actually are right now. What would make it difficult to get to a 10? Name the thing — fear, pride, privacy, not trusting the process yet. All of those are valid. Name it anyway.*

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**If you were to get support with this — what would good support look like?**

*Some people want someone to hold them accountable to what they said matters. Some want to be told what to do. Some want their thinking tested when it's incomplete or comfortable. Some aren't sure yet. What would actually help — and what would get in the way?*

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**On a scale of 1–10, how ready are you to do what this change actually requires — not what you hope it requires?**

*What is the number — and what is creating the gap between your number and a 10? Is it time, fear, other people, not knowing what 'what it requires' actually means? The gap is where the real work lives.*

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## 7. What Happens Next

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You've just said things out loud that most people carry quietly.

That alone has value. Keep what you wrote. Read it again in a week. Notice what changed and what didn't.

### If you'd like to take this further

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*Thank you for being here. That means something.*

*Three questions — not for us, for you. Are you open to this? Are you willing to do what it actually requires? And are you ready — not performing ready, actually ready?*

***If yes — we'd like to walk with you. If not yet — we're genuinely grateful you were honest. The door stays open.***

### Is there anything you haven't told us that would change how we approach this?

*This is always the last question. And it is always the most important one. The thing you nearly wrote three times and deleted. The thing that feels too small to mention or too big to say. That's the one.*

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We offer a Clarity Call — a conversation with someone who has already read what you wrote. Not a pitch. A mirror.

You will hear what you said, what we noticed, and what we think it means. You will leave with greater clarity about where you are and what is available to you.

We may be the right people to walk with you. We may not. We may know someone who is. We will tell you honestly which one it is — and we will trust you to do the same.

*If we do choose to work together, and you give us permission to hold you accountable to your goals, and you do the work — the result follows the process. You can withdraw that permission at any time. That is the commitment. Three conditions. One commitment. Everything else is execution.*

**Name**

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**Best way to reach you**

*Email, phone, or both.*

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**When is a good time for a conversation?**

*Day, time, timezone — whatever helps us find you. Leave this blank if you're not ready yet.*

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*Movement • Association • Expression — for all who choose so*