



# CUSTOMER TO PARTNER CONTINUUM ASSESSMENT TOOL

## From Transactional to Transformative

### What is the Customer to Partner Tool?

A core principle of Culture of Belonging is shifting from customer to owner/partner, from a service delivery, transactional model to a participant-owned and led culture. This assessment was designed to help you assess if your organization has a transactional relationship with its constituents, or is truly engaged with people as partners.

### Why use this assessment?

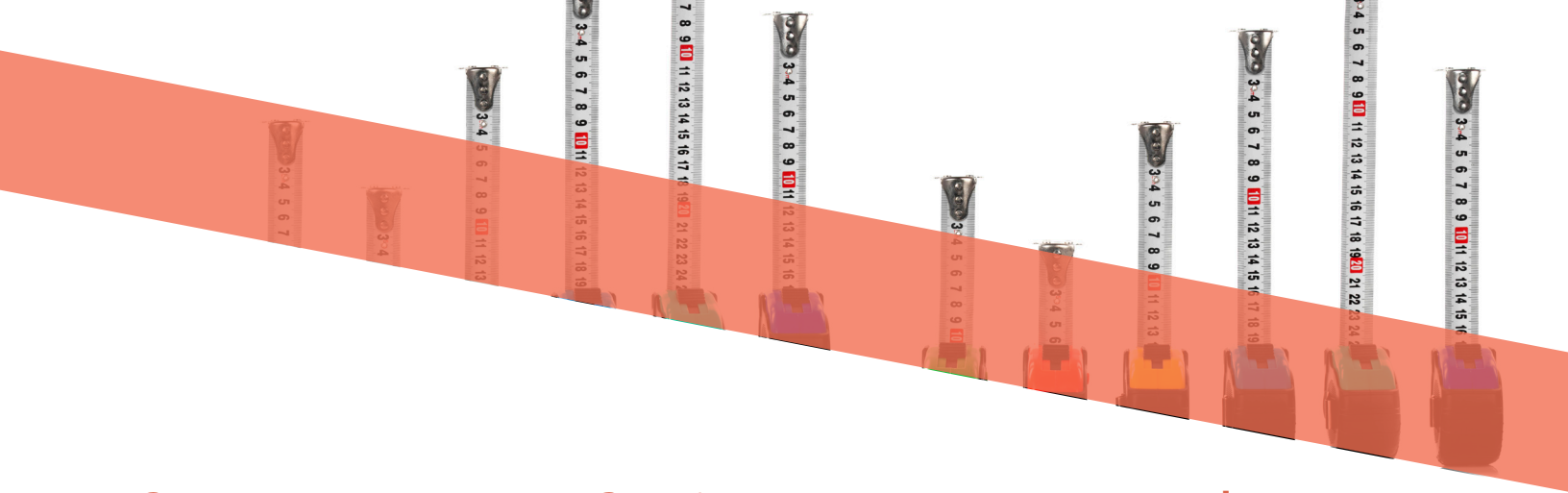
We all work hard at running welcoming, inclusive places, but many of the challenges organizations experience stem from constituents feeling like customers rather than equal owners despite our best intentions. Culture of Belonging offers concrete tools to shift that dynamic, but first, we have to assess where our organizations are falling short and where they are succeeding in building partner relationships.

### When should one use this assessment?

This assessment can be used when rethinking an existing program or meeting or designing a new one. This assessment can also be used to generate an organizational discussion about shifting to a Culture of Belonging and identifying areas to work on.

### How to use this assessment?

- Decide on what you are assessing: The organization? A specific event? Or a meeting?
- Review the 8 questions below. For each question:
  - Assess where the organization, event or meeting is on the continuum and ask yourselves why this is.
  - Assess where the organization, event or meeting should be on the continuum and think and discuss what might support this shift.



# Customer to Partner Continuum – Assessment Tool

The organization / event / meeting that you are evaluating: \_\_\_\_\_

We focus on the needs/wants of our constituents and tailor solutions to those needs/wants.

We build on the unique assets that each person brings so that each can contribute and play a role.

Customer

Partner

We strive to deliver excellent content/service to ensure people get their money's worth and stay or come back.

People stay and come back because they feel a sense of ownership and help drive the content with us.

Customer

Partner

We continuously recruit volunteers and assign them tasks based on what needs to be done.

We understand the assets of our community and invite people to contribute based on their unique strengths and skills

Customer

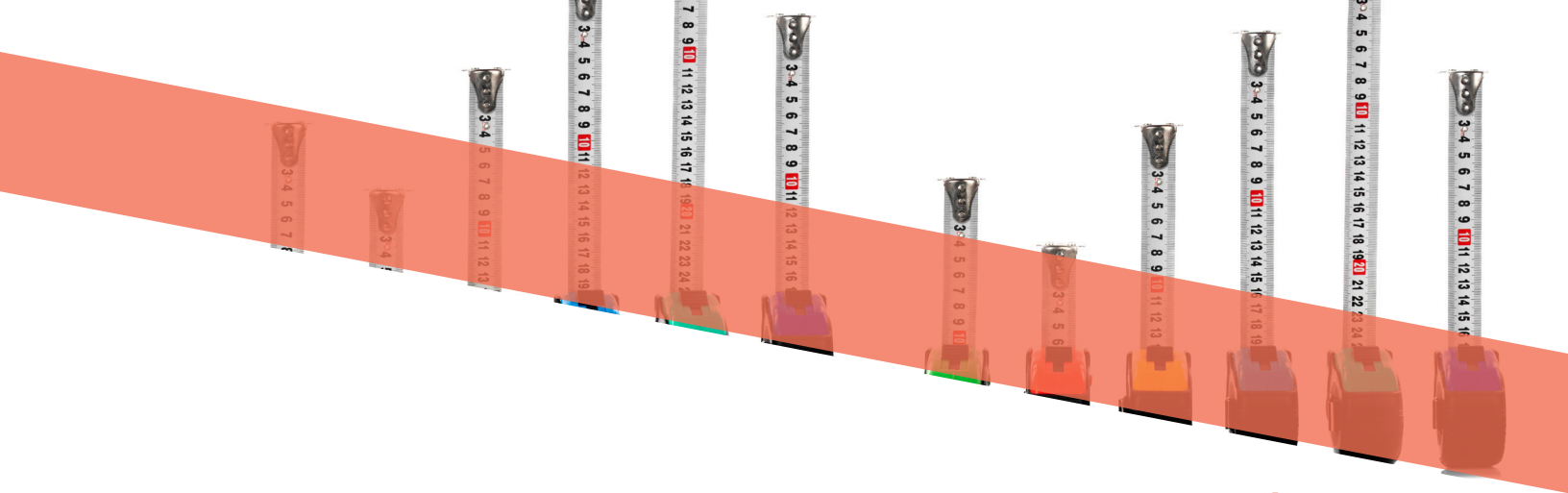
Partner

We rarely use volunteers.

Volunteers are deeply engaged and empowered by professionals to play an active role in the organization.

Customer

Partner



## Customer to Partner Continuum – Assessment Tool (cont.)

We achieve our goals (enrollment, membership, fundraising, etc.) by devoting significant resources to marketing, selling and recruiting.

We achieve our goals (enrollment, membership, fundraising, etc) by strengthening the networks between people (social capital) and building belonging.



We measure success by attendance numbers and satisfaction surveys.

We measure success by new relationships formed, people bringing others, increased retention, and willingness to take ownership.



We have a culture of complaining; people demand that we solve their problems, or they vote with their feet and leave.

People see themselves as part of the solution and take responsibility for solving problems. Stronger relationships result in less complaining.



Activities are initiated from the top down (by professionals, or a small leadership group) with few opportunities for meaningful involvement.

People are included in authentic, meaningful ways at all phases of planning so they feel valued and invested.

