

PARIVEDA

The Purposeful Profit Playbook

Brought to you by Pariveda's Purposeful Profit Team | Version 1.2





Guiding purposeful growth with the Purposeful Profit Playbook

At Pariveda, purpose serves as the operating system for growth. It sets a standard for decisions and shapes the value we offer our people, the business, and our communities.

This playbook equips leaders to align strategy, offerings, and culture with a clear purpose so performance strengthens over time. Teams clarify a Purposeful Value Proposition, focus on the stakeholders they are built to serve, and design profitable offerings that create a positive impact.

The approach is grounded in the Purposeful Profit Equation and Pariveda's client experience across industries, supported by practices embraced in purpose-led business communities. Use it to earn trust with customers and employees, make clearer choices in the moments that count and deliver outcomes you can stand behind.

A LETTER TO LEADERS DRIVEN BY PURPOSE

You are one of the ones who knows building a business has to be for more than just making money. You want to build a company that makes a difference and cares about the broader impact on your people, your customers, and your communities. That same conviction has guided my work for more than 20 years and it is why this playbook exists.

Over the last several years, alongside the purpose-driven leaders at my firm, we have developed the Purposeful Profit business philosophy to share with others how we have been able to align financial performance with meaningful impact. The Purposeful Profit model reframes growth to include employee well-being, social and environmental impact, and long-term resilience by solving real customer needs in ways that create positive outcomes. It grows from the alignment of what you do, who you serve, and why you exist so value reaches employees, customers, communities, and shareholders.

This playbook gives you space to reflect, ask honest questions, and bring your values into your strategy and decision-making process. That way, the structures and operations of your business support the impact you intend to create.

If you are here, you are already leaning into what responsible leadership looks like. I am grateful to walk with you as you put this model to work in your business.

Leadership in this space is the art of making the right choice the easy choice. When values live inside the systems of the business and targets are clear, teams are more confident and equipped to keep the promises your company made from the start. The result is a business employees and clients can trust to do what is right, even when it's hard.

My advice: begin small and visible. Take this playbook one page at a time. Because it's up to you to build a company your team is proud to grow and your customers are proud to choose. One decision at a time, turn conviction into systems that endure.

The world is full of companies that talk about purpose. Be one of the few that runs on it.

With respect,



Tiffany Lentz, Managing Vice President
Purposeful Profit Lead, Pariveda Solutions



THE PURPOSEFUL PROFIT PLAYBOOK

Who should use this playbook

Before you get started, there are a few essential elements you'll want to get together that will set your organization up for success as you work through the Purposeful Profit Playbook.

This tool is designed for:

- Executives and senior leaders in purpose-driven mid-market or growth-stage companies
- Operations, strategy, HR, and finance leaders seeking to align purpose with performance
- Teams exploring B Corp, ESG, or purpose-driven growth models
- Any organization aiming to integrate purpose into offers, operations, and culture

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What you'll need to get started

A clear business context or use case

- You'll get the most from this playbook if you choose a real context(e.g., entering a new market, redesigning an offering, shaping team culture)
- *Tip:* The more specific the context, the easier it will be to turn insights into action

A cross-functional team or representative

- While you can use this playbook individually, ideally you'd include voices from:
 - Product or technology
 - People/HR or talent development
 - Finance or operations
 - Purpose/social impact/governance
- Diversity of perspective strengthens the outputs

Clarity on mission & impact goals

- Bring a copy of your mission statement, current OKRs/strategic plan, or impact goals
- Purposeful Profit is most powerful when grounded in what you already stand for

Access to key metrics and insights

- Be ready with financial data (margin, revenue mix), employee engagement scores, customer NPS/outcomes, or other performance signals
- You'll be asked to connect purpose with measurable outcomes

60-90 minutes of focused time per session

- The playbook works best in three structured working sessions
- Depending on depth, you can run this as a sprint (three sessions in a week) or spread across a quarter



How to use this playbook

This playbook is designed to help you move from insight to action, whether you're leading a global enterprise or a growing team.

You can work through it:

Individually

- As a self-guided reflection tool
- To evaluate how aligned your current strategy is with your values
- To clarify what purposeful profit looks like in your role or business unit

With your team

- To create a shared understanding of purpose across leadership
- To surface misalignments and gaps
- To co-design strategies that reinforce both profit and impact

In strategic retreats or working sessions

- As a team alignment tool
- To pressure-test growth decisions against core values
- To build toward a more consistent, long-term model for scale

What's inside

Each section builds on the Purposeful Profit Equation and is designed to drive clarity, alignment, and forward momentum.

You don't need to do everything in one sitting. You can start where the tension feels most real. But wherever you begin, this playbook is here to help you build a business that thrives *because of* what it stands for, not in spite of it.

How to use this playbook



WORK IN THREE SESSIONS

The playbook is designed to run across three focused sessions (60-90 minutes each). Each session builds on the last, moving from defining your purpose to embedding it in action.



CAPTURE DECISIONS, NOT JUST IDEAS

Use the worksheets and canvas to record clear choices like who owns them, what success looks like, and when the first checkpoint will happen.



MOVE INSIGHTS INTO ACTIONS

At the end of each session, identify one experiment, two operating levers, or a small set of KPIs to carry forward. The goal is progress you can measure, not theory on paper.



BUILD CONSISTENCY OVER TIME

Return to the playbook quarterly or annually to update your canvas, refresh your KPIs, and re-align around what matters most as your business evolves.

What you'll cover in each session

1 DRAFT THE EQUATION

Section 1: Purposeful Profit Equation

- Draft the one-sentence proposition
- Identify 1-2 priority stakeholders
- Design one 30-day offer experiment with an owner

FOCUS: DEFINE THE STARTING POINT

2 BUILD THE MODEL

Section 2: Purposeful Profit Canvas

- Fill out the full canvas

Section 3: Systemizing Purpose

- Review the five levers checklist
- Select two levers to strengthen this quarter

FOCUS: APPLY AND EMBED PURPOSE INTO SYSTEMS

3 LOCK THE PLAN

Section 4: From Insight to Action

- Create a 30-60-90-day plan
- Choose three monthly signals (including the impact KPI from Section 1.3)
- Establish a monthly review cadence

Section 5: The Purposeful Profit Declaration

- Sign a written commitment to embed purpose in the business system

FOCUS: MAKE EXECUTION REAL AND ACCOUNTABLE



INTRODUCTION

Orientation & Strategic Framing

What is Purposeful Profit?

Purposeful Profit is a business philosophy that aligns financial performance with meaningful impact. It reflects a business model that drives revenue by solving real needs, honoring clear values, and contributing to something beyond the transaction.

Purposeful Profit is not philanthropy dressed up as strategy. This business philosophy is a structured approach to integrating purpose into your offerings, your culture, your systems, and your leadership decisions.

When a business is aligned with Purposeful Profit, growth is redefined. This growth includes:

- Revenue and margin
- Customer trust and loyalty
- Employee engagement and retention
- Social, environmental, or systemic contribution

Why Purposeful Profit matters now

Today's customers, employees, and investors are no longer satisfied with mission statements and marketing language. They want alignment and action. They want to work with, buy from, and invest in companies that:

- Know what they stand for
- Can articulate it clearly
- Make decisions in alignment with those values
- Are willing to sacrifice for it when it counts

88%

of consumers prefer to purchase from brands whose values align with their own¹

62%

of workers consider a company's purpose when deciding where to work²

12%

ROIC growth from 2019-2023, compared to 28% decline in companies without corporate purpose³

3x

Purpose-driven companies report **3x faster growth** and greater customer satisfaction⁴

Yet many companies still struggle to move from purpose as *intent* to purpose as *infrastructure*. This playbook exists to help bridge that gap.

The Purposeful Profit Equation

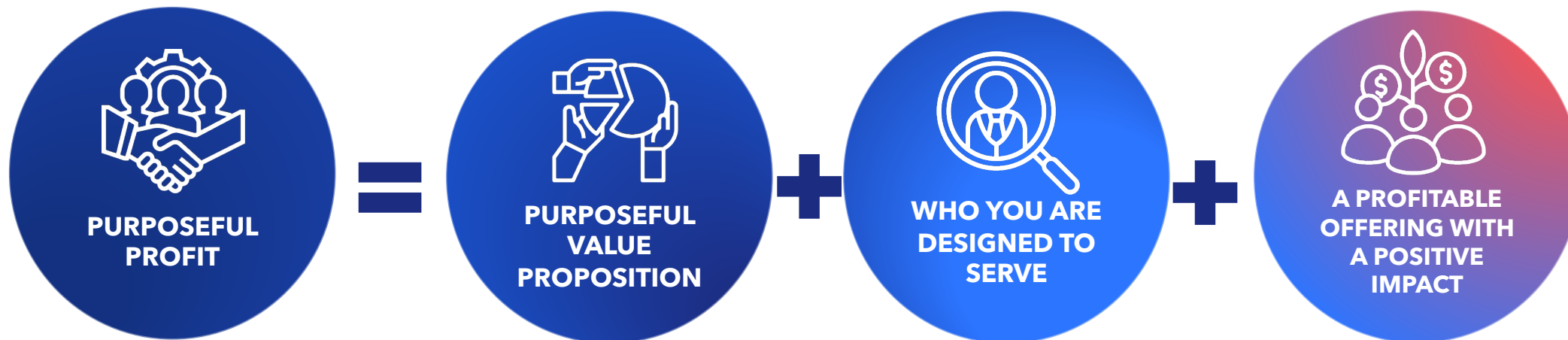
The Purposeful Profit Equation is a framework for aligning purpose with performance. It focuses strategy on what your organization uniquely delivers and why it matters, clarifies the stakeholders you are truly built to serve, and ensures that your offers generate both healthy margins and measurable positive impact.

By applying it consistently, the equation closes the gap between stated values and the day-to-day decisions that shape how the business grows.

How to use The Purposeful Profit Equation

- As a lens for planning and portfolio choices
- As a filter for investments, tradeoffs, and partner decisions
- As a framework for facilitating alignment across leadership teams

When used intentionally, the Purposeful Profit Equation will help you build a business that is more focused on what matters most, more adaptable to market changes, more trusted by employees and customers, and more human-centric at the core.



SECTION 1

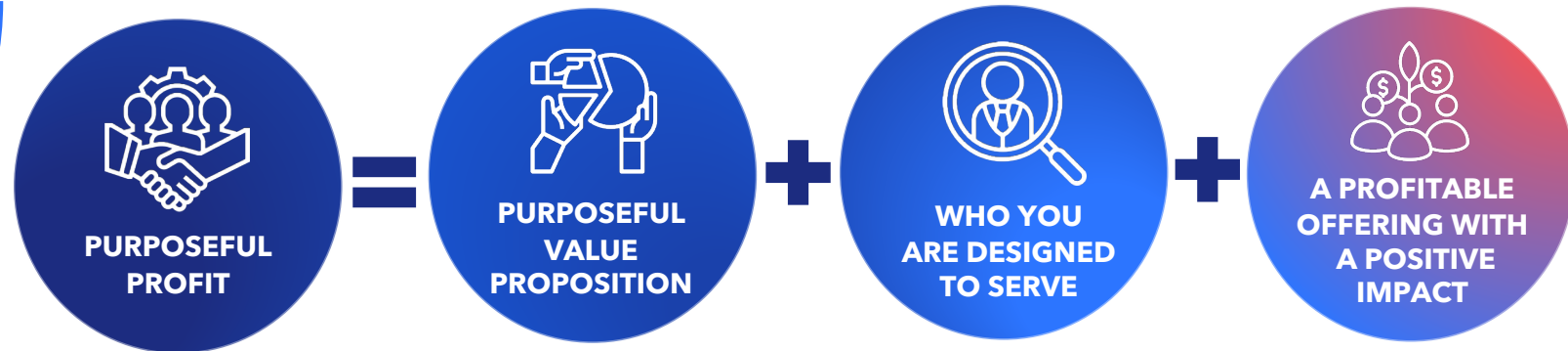
The Purposeful Profit Equation



What is The Purposeful Profit Equation?

The Purposeful Profit Equation is a practical tool designed to help you align values with operations, impact with margin, and purpose with sustainable growth.

The Equation:



The Equation

Each of these components is essential on its own, but their power is in how they interact.

- **Your Purposeful Value Proposition** defines what you uniquely bring to the world, rooted in your skills, motivations, and values.
- **Who You Are Designed to Serve** challenges you to focus not just on *any* customer, but on the stakeholders whose values align with your own.
- **A Profitable Offering with a Positive Impact** helps you generate sustainable margin *while* creating positive impact, through your product, service, or operating model.

When these three are in sync, your business becomes a reflection of your purpose, not just a container for it. Growth becomes clearer. Trade-offs become easier to navigate. Culture becomes more coherent. And your brand becomes more trusted.

This section will help you explore each part of the equation through:

- Executive reflection prompts
- Collaborative team discussions
- Practical worksheets to build alignment

Let's begin with the foundation: your **Purposeful Value Proposition**.

References:

1. Givslly, "Over 88% of US Consumers Purchase From Brands That Align With Their Values Finds Givslly Research," May 20, 2025, <https://company.givslly.com/2025/05/over-88-of-us-consumers-purchase-from-brands-that-align-with-their-values-finds-givslly-research/>
2. Roxana Corduneanu, Payal Vasudeva, Katie Minton, and Zeinab Chaudhary, "Mind the purpose gap: Translating purpose into business reality requires more than you think, and the workforce has clear expectations," Deloitte Insights, October 20, 2022, <https://www.deloitte.com/us/en/insights/topics/business-strategy-growth/mind-the-purpose-gap.html>
3. Chief Executives for Corporate Purpose, "Corporate Purpose: Driving Business Value," April 22, 2025, <https://mvcecp.cecp.co/s/article/Corporate-Purpose-Driving-Business-Value>
4. Deloitte Canada, "2020 Global Marketing Trends: Bringing authenticity to our digital age," December 1, 2020, <https://www.deloitte.com/ca/en/services/consulting/perspectives/global-marketing-trends-2020.html>



PURPOSEFUL VALUE PROPOSITION

SECTION 1.1

The Purposeful Value Proposition

What is the Purposeful Value Proposition?

In standard practice, value propositions focus on the profit a company can produce. A purposeful value proposition integrates the motivational and purpose-driven values of your organization so that the value you create reflects the values you hold.

Your **Purposeful Value Proposition** clarifies what you uniquely create, why it matters, and the values that power how you work. It combines what you do best, what energizes your people, and the beliefs that guide decisions.

Purposeful Profit Equation breakdown

Purposeful Value Proposition =

The sum of your organization's skills and abilities



What energizes and motivates your organization and employees



Your why, the core values that drive your company

Why the Purposeful Value Proposition matters

When organizations don't define their Purposeful Value Proposition clearly, the value they create can drift from the values they hold. Teams lose clarity. Stakeholders lose trust. Purpose gets reduced to public relations.

But when your Purposeful Value Proposition is clear, it becomes an organizing force, attracting aligned customers, anchoring your strategy, and energizing your people.

- Concentrates effort on the work you are uniquely positioned to do
- Attracts values-aligned customers, partners, and talent
- Guides tradeoffs under pressure so choices remain coherent
- Reduces values drift as you scale and diversify

Executive reflection prompts

Use these for personal clarity or to facilitate dialogue with your leadership team:

1. What are we uniquely capable of doing?

What strengths, competencies, or lived experiences give our organization a distinctive edge?

2. What kind of work energizes our people?

Where do we see the most passion, commitment, or pride, even when it's hard?

3. What values shape how we work and what we care about?

Which core principles show up again and again in decisions, behaviors, and team culture?

4. What kind of change are we trying to create in the world?

What impact are we built to make – for our customers, our employees, or our communities?

5. Where do you see gaps between what you say you value and what gets delivered today?

What recent decision would have gone differently if our stated values were the deciding lens?

WORKSHEET 1.1A INPUTS INVENTORY

Fill in the elements below to begin shaping your Purposeful Value Proposition

	PROMPT	RESPONSE
SKILLS & STRENGTHS	What are you known for? What do you consistently deliver well?	
MOTIVATIONS	What kind of work do your people care about? What outcomes do they find most meaningful?	
CORE VALUES	What beliefs or principles guide your decisions?	
ORGANIZATIONAL "WHY"	Why do you exist beyond making profit? What is your higher intention?	

TIPS

- Reference recent wins, loss reviews, and performance data
- Name specific examples leaders can point to in conversations

Worksheet 1.1B - Prep Work | Team Reflection

Team discussion prompts

1. Where do we see a disconnect between our stated values and the value we currently deliver?
2. Are there parts of our current value proposition that no longer reflect who we really are?
3. What would change if we took our purpose more seriously in how we define our value?

WORKSHEET 1.1B EVIDENCE MAP

Link each input to proof so the proposition is credible and auditable

INPUT TO PROVE	DECISION	RESULTS	METRIC
<i>Skill, value, or belief</i>	<i>What choice did it influence</i>	<i>Outcome for client, employee, community</i>	<i>Link to doc, metric, quote, case</i>

Worksheet 1.1C - Prep Work | Team Reflection

Team discussion prompts

These questions will help identify gaps you will need to fill in on the Section 1 Synthesis Canvas at the end of this section.

1. Where are our proof points weak or missing?
2. Do we have any feedback from customers, employees, or partners that signals misalignment?
3. Do we have any OKRs, metrics, or initiatives that don't reflect our stated values?
4. What are some clear gaps where our current actions don't fully match our purposeful intentions?
Examples of gaps:
 - "Our pricing model undercuts our stated value of accessibility."
 - "We say employees are our priority, but engagement scores are lagging."
 - "We commit to sustainability, but supplier audits are inconsistent."

WORKSHEET 1.1C SYNTHESIS BUILDER

Now synthesize the information from 1.1A & 1.1B into a draft Purposeful Value Proposition statement:

Template 1

"We create value by _____ for _____,
[doing what] [whom]

because we believe _____."
[why]

Template 2

"Because we believe _____, we deliver _____,
[core belief] [capability or approach]

that enables _____ to achieve _____."
[stakeholder] [specific outcome]

Integrity and fit checklist

Use this quick screen before you socialize the draft

- Clear enough for sales to use in a first call
- Specific enough for delivery to design around
- Evidenced with at least three concrete proof points
- Inclusive of employees and customers in the value you promise
- Simple enough to remember and repeat

Final Action: Section 1.1 Synthesis Canvas

THE PURPOSEFUL VALUE PROPOSITION STATEMENT | *Write your final statement here*

PROOF POINT #1
PROOF POINT:

EVIDENCE:

PROOF POINT #2
PROOF POINT:

EVIDENCE:

PROOF POINT #3
PROOF POINT:

EVIDENCE:

GAP #1

GAP #2

METRIC TO REVIEW #1

METRIC TO REVIEW #2

OWNER NAME

OWNER NAME

NEXT CHECK-IN DATE:

NEXT CHECK IN DATE:

“Designing your strategy
around aligned stakeholders
leads to stronger relationships
and a clearer sense of accountability.”

Tiffany Lentz, Managing Vice President, Purposeful Profit Lead





SECTION 1.2

Who You Are Designed to Serve

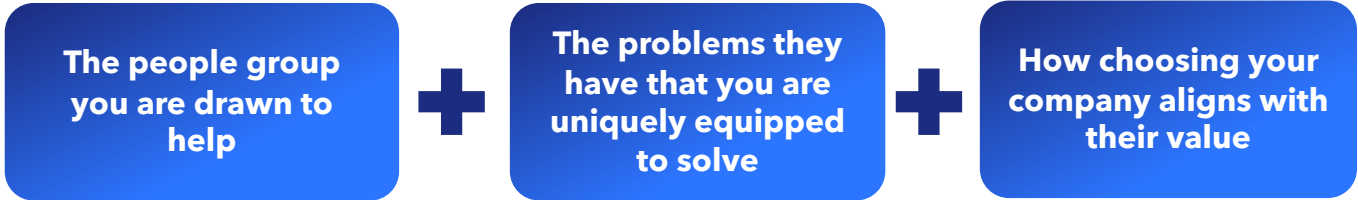
What is it?

Who You Are Designed to Serve identifies the stakeholders whose success is intertwined with yours. These are the customers, employees, communities, or partners who share your values, feel the difference your work makes, and benefit most from your strengths.

In a Purposeful Profit business, you don't aim to serve everyone. You aim to serve the *right* people, those for whom your impact matters. Those who see value in your purpose, not just your price point. Those who become more loyal and more connected because of what you stand for.

Purposeful Profit Equation breakdown

Who You Are Designed to Serve =



Why defining who you serve matters

Without clarity about who you serve, your business can become overly transactional, or worse, generic. Purposeful Profit businesses make strategic choices to position themselves to serve people who:

- Share their values
- Need their specific strengths
- Feel connected to the impact they create

When you're clear on who you're built to serve, you create a better view of the value you can provide and can more easily develop trusting and long-lasting relationships with your customers.

- Concentrates go-to-market and delivery on the relationships that create long-term value
- Strengthens trust and loyalty because expectations and values align
- Improves portfolio choices by clarifying who you will prioritize and who you will not pursue
- Reduces drift as you scale into new markets or geographies

Executive reflection prompts

Use these for personal clarity or to facilitate dialogue with your leadership team:

1. Who are we really built to serve?

Think about more than just your customers. Who truly benefits when your business thrives?

2. What problems do they face that we are uniquely equipped to solve?

What unmet needs, barriers, or gaps are we best suited to address?

3. How do our values align with theirs?

Where do we see shared beliefs, priorities, or long-term goals?

4. How does choosing us create meaning or value for them?

What emotional or identity-based connection do we foster beyond the product or service?

5. Where are we spreading ourselves across audiences that dilute focus?

Where do we risk weakening culture by pursuing growth in segments that do not fit?

WORKSHEET 1.2A STAKEHOLDER UNIVERSE AND PRIORITY SCORE

Fill in the table below to list all your stakeholders, then score each group (1-5) on:

- **Strategic fit** with your value proposition
(How well can we solve their problems?)
 - **Impact potential** toward your purpose
(Does serving them further our purpose?)
- **Economic value** in revenue or margin
(Do they have the necessary resources to work with/buy from us?)
 - **Values alignment** with their lifestyle and beliefs
(How aligned are they with our values?)

Add the scores to get a total out of 20. Highlight the top 1-2 groups to carry into **1.2C** and the **Who You Serve** box on the canvas.

STAKEHOLDER GROUP	STRATEGIC FIT	IMPACT POTENTIAL	ECONOMIC VALUE	VALUE ALIGNMENT

Tips

- Values alignment and problem fit usually deserve the highest weight
- Keep the top two groups for near-term focus and place others on a watch list

WORKSHEET 1.2B PROBLEM AND OUTCOME CANVAS FOR A PRIORITY GROUP

Capture concise bullets you can use in sales, delivery, recruiting, and partnerships

FIELD	PROMPTS	NOTES
Who they are	<i>Roles, industries, maturity, locations</i>	
Core jobs or problems	<i>What they are trying to get done, what is hard about it</i>	
Barriers and risks	<i>Organizational, technical, regulatory, cultural</i>	
Outcomes they value	<i>Success criteria in their words, proof they care</i>	
Values cues	<i>Phrases, behaviors, or policies that signal alignment</i>	
Decision criteria	<i>How they evaluate partners or employers</i>	
Procurement or compliance needs	<i>Security, ESG, certifications, legal reviews</i>	
Champions and blockers	<i>Who advocates and who resists, and why</i>	

Section 1.2 Synthesis Canvas - Prep Work | Stakeholder alignment signals

Choose your offer's impact KPI now so every improvement experiment tests both purpose fit and margin, then carry the same KPI into Section 3 and Section 4 for cadence and reporting

How to use this

- Pick two to three signals you will read every month
- Name a data owner and a target for each
- Keep the same signals for at least two quarters
- Input these into the Section 1.2 Synthesis Canvas

1

Market and customer

- **Win rate in priority segments:** percent of qualified deals we win in the segments we chose
- **Retention in priority segments:** percent of customers we keep in those segments
- **Expansion in priority segments:** revenue growth from upsells or cross-sells in those segments

Decision rules

Guardrails that help teams move quickly with integrity

- Go-to-market focuses on the selected segments until the next review
- Opportunities with low values alignment are declined or routed to partners

2

Employee and internal

- **Time to fill key roles:** days to hire for teams serving priority segments
- **Retention on aligned teams:** percent of people who stay on those teams
- **Engagement on aligned teams:** eNPS or pulse score for those teams

3

Focus and quality

- **Revenue mix from priority segments:** percent of total revenue from the segments we chose
- **Decline rate for misaligned deals:** percent of new opportunities we intentionally pass on
- **Deal review cycle time:** average time from intake to go or no-go in priority segments

- Any large pursuit outside the selected segments requires an explicit exception with rationale and mitigation
- Refresh the universe and scores twice a year using real data and field insight



Final Action: Section 1.2 Synthesis Canvas

PRIORITY STAKEHOLDER GROUP #1: REASON SELECTED:	PRIORITY STAKEHOLDER GROUP #2: REASON SELECTED:		
PROBLEMS TO OWN	PROBLEMS TO OWN		
OUTCOMES THEY EXPECT	OUTCOMES THEY EXPECT		
HOW TO MEASURE SUCCESS	HOW TO MEASURE SUCCESS		
SHARED VALUE	SHARED VALUE	SHARED VALUE	SHARED VALUE

"We serve _____ *[stakeholder group]* by addressing _____ *[problem]*, in ways that reflect our shared value of _____ *[value]*, helping them _____ *[desired outcome or transformation]*."



SECTION 1.3

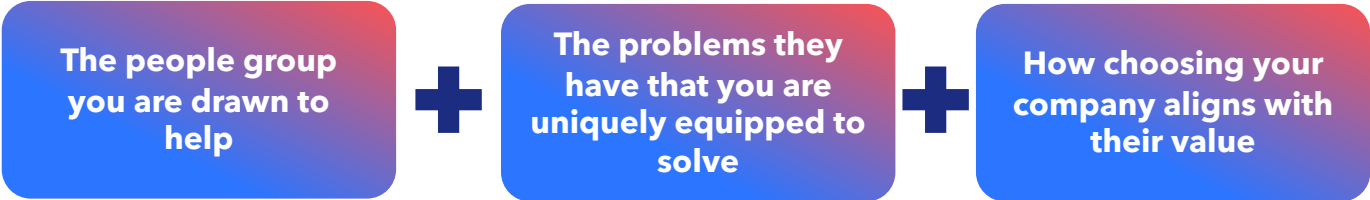
Profitable Offerings with a Positive Impact

What is a Profitable Offering with a Positive Impact?

A **Profitable Offering with a Positive Impact** is a product or service that generates a healthy margin and creates a tangible, measurable positive impact. This can show up through employee development, end-user outcomes, or environmental benefits. The aim is to meet a real need, reflect your values, and enable the business to thrive without compromising what it stands for.

Purposeful Profit Equation breakdown

Profitable Offering with a Positive Impact =



Why a Profitable Offering with a Positive Impact matters

When offerings align with purpose and margin, leaders gain clearer investment choices, stronger loyalty, and a more resilient economic standing. This is where purpose transitions from messaging to a model that you can operate and scale.

Executive reflection prompts

Use these for personal clarity or to facilitate dialogue with your leadership team:

1. Which current offers consistently deliver strong margins and clear impact outcomes?

2. Where are we profitable but misaligned with our values?

3. Where are we values aligned but economically weak, and what would it take to reach the target margin?

4. What new offer could better serve our most aligned stakeholders?

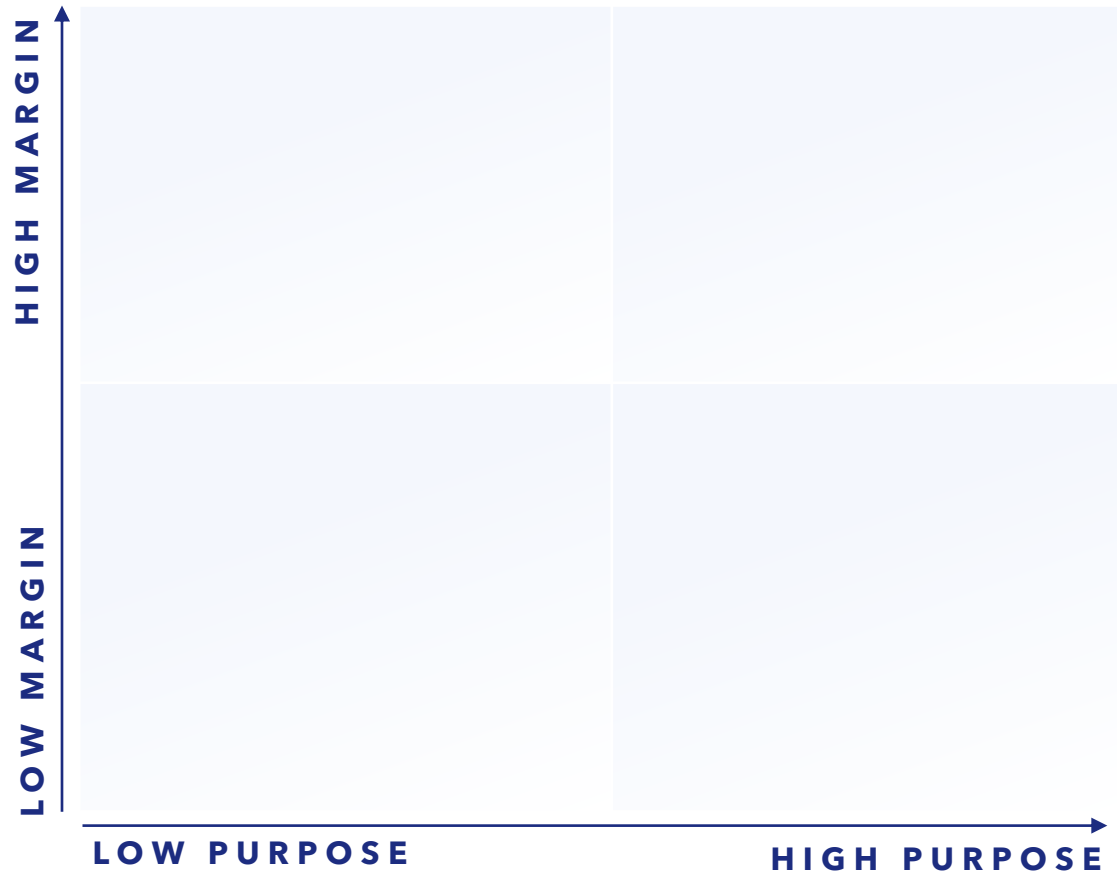
5. What should we retire or redesign because it erodes trust or distracts focus?

WORKSHEET 1.3B PURPOSE FIT X MARGIN

Plot each offer on the grid by **purpose fit** (low to high) and **margin** (low to high). Then decide the action:

- Top right (high purpose fit, high margin): Scale and showcase
- Bottom right (high purpose fit, low margin): Redesign to improve economics
- Top left (low purpose fit, high margin): Redesign to strengthen purpose alignment
- Bottom left (low on both): Consider sunseting

This helps you choose whether to **scale, redesign, or exit** each offer before selecting one experiment in **1.3 C**.



For each offer, note:

- Current Quadrant
- One decision for the next quarter
- One structural change to test

OFFER 1:

OFFER 2:

OFFER 3:

OFFER 4:

OFFER 5:

Worksheet 1.3C - Prep Work | Impact measurement menu

Choose your offer's impact KPI now so every improvement experiment tests both purpose fit and margin, then carry the same KPI into Section 3 and Section 4 for cadence and reporting

How to use this menu

- Using this menu prevents vanity metrics by anchoring impact to a unit of work that customers actually buy
- Choose one impact KPI that aligns with your Purposeful Value Proposition and priority stakeholders
- Use an item below or write an equivalent metric that you can measure monthly with trustworthy data
- Keep it actionable; the KPI should influence decisions and behavior next month

The listed bullets below are examples to choose from or adapt. Pick one that is measurable monthly and clearly tied to the value you promise.

1

Software or SaaS

- Customer outcome achieved rate
- NPS in the priority segment
- Emissions per active user session

2

Consulting or services

- Percent of project hours that met growth goals in reviews
- Client outcome achieved vs baseline
- Retention of high performers on purpose-aligned projects

3

Marketplace or e-commerce

- Verified income lift or order repeat rate in the priority segment
- Customer NPS in values-aligned categories
- Percent of suppliers meeting stated standards

In Worksheet 1.3C, put the chosen KPI in the "Success Metric and Target" column, include:

- Impact KPI name
- Data source and owner



Worksheet 1.3C – Prep Work

PROFIT CHECK

Confirm these five items before you greenlight an offer change:

- **1 Target margin range named for this offer:** agree on the acceptable margin range with finance and use it to guide pricing, packaging, and deal review
- **2 Top two costs to serve drivers are known:** identify the most significant cost drivers at the feature or worktype level, so improvements and scope decisions hit the right levers
- **3 Price architecture and discount guardrails documented:** define clear tiers or packages and set simple rules for when and how discounts apply to protect price realization
- **4 Capacity to deliver this quarter confirmed:** validate staffing, throughput, and start dates so the team can meet commitments without eroding quality or margin
- **5 One impact KPI named with data source and owner:** pick a measurable outcome that proves a positive impact, specify where the data comes from, and assign who reports it

WORKSHEET 1.3C DESIGN THE IMPROVEMENT TEST

Turn intent into a small experiment you can run within a quarter. Use the Profit Check and the Impact Measurement Menu to help fill in this worksheet.

OFFER	HYPOTHESIS TO TEST	CHANGE TO PRICING, PACKAGING, OR PROCESS	SUCCESS METRIC TO TARGET	START DATE	OWNER

Examples of testable changes

- Add a premium tier that funds scholarships or pro bono hours
- Bundle advisory with implementation to improve outcomes and margin
- Shift delivery to a mixed onshore/nearshore model with quality guardrails
- Introduce a lower carbon option with a clear claim and audit trail

Decision rules to keep you aligned

Simple guardrails help teams move faster with integrity

- Any net new offer must show a path to target margin within two quarters
- Any claim of impact must have a named KPI and data source before launch
- Offers that consistently miss both margin and impact targets move to redesign or sunset

Final Action: Section 1.3 Synthesis Canvas

OFFER #1
Write the offer you will scale and protect

OFFER #2
Write the offer you will scale and protect

OFFER#3
Write the offer you will scale and protect

OFFER TO REDESIGN AND TEST

OFFER TO REDESIGN AND TEST

OFFER TO SUNSET OR REPLACE

ONE IMPACT KPI TO INCLUDE IN MONTHLY BUSINESS REVIEWS



SECTION 2

The Purposeful Profit Canvas

What is the canvas?

The Purposeful Profit Canvas is a model that helps you map stakeholders, offers, and value creation in order to align purpose and performance. This canvas provides a one-page view of decisions from Sections 1.1 to 1.3 that your team can review in two minutes and execute this quarter.

How to use it

- Fill it in live during Session 2 using the prompts below
- Capture only what you will fund and do this quarter
- Add metrics after Session 3 when you finalize KPIs

Canvas companion quick tips

1

Fill these boxes first

- Value Proposition
- Who You Serve
- Key Initiatives

2

How to write

- Short phrases, not paragraphs
- Only include what is funded this quarter
- Link to proofs rather than pasting long text

3

Pitfalls to avoid

- Aspirations that are not resourced
- Mixing internal programs into customer offerings
- No owners or dates on initiatives
- Wordy statements that teams will not repeat

4

10-minute review checklist

- ❑ Does the canvas reflect 1.1 to 1.3 decisions?
- ❑ Are owners and dates visible for each initiative?
- ❑ Can a new leader understand this in two minutes?
- ❑ Do we have one risk and one dependency noted?



The Purposeful Profit Canvas

PURPOSEFUL VALUE PROPOSITION

WHO YOU SERVE

- 1.
- 2.

PROFITABLE OFFERINGS WITH POSITIVE IMPACT

- 1.
- 2.

INITIATIVE

KEY INITIATIVES THIS QUARTER

OWNER

1ST CHECKPOINT

SUCCESS MEASURE

- 1.
- 2.
- 3.

OPERATING LEVERS

- 1.
- 2.

PROOF OF VALUES IN ACTION

ONE RISK & ONE DEPENDENCY

R:
D:

METRICS/SIGNALS

- 1.
- 2.
- 3.

The Purposeful Profit Canvas

SAMPLE COMPANY: B2B SaaS Trust and Compliance Automation

PURPOSEFUL VALUE PROPOSITION

We help growing companies earn and prove customer trust by automating security and privacy workflows because we believe responsible growth requires transparency and discipline.

WHO YOU SERVE

1. Mid-market software and fintech teams that sell into enterprise and must pass security and privacy reviews
2. Legal, security, and revenue leaders who value speed to trust and audit readiness

PROFITABLE OFFERINGS WITH POSITIVE IMPACT

1. Trust automation platform with SOC 2 and ISO workflows
2. Enterprise tier with vendor risk management and DPA automation

KEY INITIATIVES THIS QUARTER

INITIATIVE	OWNER	1 ST CHECKPOINT	SUCCESS MEASURE
1. 30-day packaging and price test for the Enterprise tier to lift win rate and margin	VP Product Lina	First review Oct 16	Enterprise win rate improves by at least 10% in target segment and average deal margin increases by 5 points compared to baseline
2. AI-assisted evidence collection pilot to reduce customer time to audit readiness	Head of Eng Rafael	Checkpoint Oct 23	Reduce average customer time to audit readiness by 20% vs baseline, with at least 80% pilot users reporting improved speed and ease of compliance
3. Partner enablement program for security assessors with two reference stories	VP Alliances Noor	Draft kit Oct 30	Secure two new assessor partnerships & publish two ref. stories by end of Q3, resulting in a 15 percent increase in inbound partner-sourced opportunities

OPERATING LEVERS

1. Decision filter and one row tradeoff log used for roadmap and large deals
2. Monthly KPI read with a one-slide dashboard and owner notes

PROOF OF VALUES IN ACTION

- 1: Zero priority-one incidents this quarter with 99.95% uptime
- 2: Published updated data privacy policy aligned with GDPR and SOC 2

ONE RISK & ONE DEPENDENCY

- R:** Legal review timing for updated DPA templates
- D:** Model accuracy for AI-assisted evidence extraction requires curated training data

METRICS/SIGNALS

1. Performance contribution margin on the Enterprise tier and price realization
2. Impact customer time to audit readiness reduced vs baseline and procurement pass rate
3. Execution experiment result vs target for the packaging and price test



SECTION 3

Systemizing Purpose

What is systemizing purpose?

Systemizing Purpose is about turning purpose from an abstract statement into a working system. It helps leaders create consistency between intentions and daily operations.

The tool in this section is a one-page checklist that guides you in embedding purpose into weekly rhythms, like how decisions are made, how resources are allocated, and how people show up in their roles. By treating purpose as a system rather than a slogan, it becomes easier to align choices, behaviors, and outcomes with the company's intended impact.

How to use the Systemizing Purpose Checklist

- In Session 2, you chose two levers from the list of five
- For each lever you chose, you will work through the three checklist items underneath
- In Session 3, you'll define success measures, owners, and checkpoints for those actions
- Use the chosen impact KPI from 1.3 as one of your success measures

Systemizing Purpose Checklist

KPIS AND OKRS WITH IMPACT SIGNALS

- ❑ Add one impact KPI and one performance KPI to the monthly readout
- ❑ Write one company OKR that ties purpose to margin for a priority offer
- ❑ Name data sources, owners, and a quarterly target

REVIEWS AND PROMOTIONS THAT SCORE VALUES IN ACTION

- ❑ Add a values-in-action line item to reviews for roles closest to delivery
- ❑ Calibrate once this quarter to align expectations across managers
- ❑ Publish two examples of decisions that met the bar

INCENTIVES TIED IN PART TO PURPOSE OUTCOMES

- ❑ Tie a small percentage of variable pay to the impact KPI in 1.3
- ❑ Limit to one simple qualifier so it is easy to track and explain
- ❑ Communicate the why, the metric, and when it pays out

DECISION FILTER WITH NON-NEGOTIABLES AND A ONE-ROW TRADEOFF LOG

- ❑ Use the five-question filter for large deals, new offers, key hires, and suppliers
- ❑ Log the decision, the rationale, and any exceptions with an owner and date
- ❑ Review the log monthly to reinforce patterns and learning

OPERATING RITUALS THAT INTEGRATE PURPOSE AND METRICS

- ❑ Add a 10-minute signals review to monthly leadership meetings
- ❑ Open meetings with one proof of purpose in action and one metric
- ❑ Keep a one-slide dashboard that the team can read in two minutes

WORKSHEET 3A PURPOSEFUL SYSTEMS

Review the list of levers. Choose two you believe will have the greatest impact this quarter. Circle or highlight your selections and note why you chose them.

LEVER	WHY THIS LEVER NOW?	SUCCESS MEASURE	OWNER	CHECKPOINT DATE

Tips

- Use the impact KPI chosen in 1.3 as a success measure where relevant
- Keep the first checkpoints within 30 days
- Limit to two levers so teams can execute

“We measure what we mean to keep. If purpose never reaches the dashboard, it will struggle to fully reach the customer. But put the impact metric next to the margin, review it monthly, and you’ll see the shift faster than from any memo or town hall meeting.”



Tiffany Lentz, Managing Vice President, Purposeful Profit Lead



SECTION 4

From Insight to Action

What is the Insight-to-Action framework?

The Insight-to-Action tool is a simple framework to turn decisions into execution. The framework uses a 30-60-90-day plan, a small set of monthly signals, and a lightweight review cadence to ensure progress stays visible and actionable.

How to use the Insight-to-Action framework?

- Build the 30-60-90-day plan with named owners and dates
- Choose monthly signals using the KPI starter list on the next page
- Schedule a 30-minute review and use the same agenda every month

Guidelines for building your plan

- Keep it to two-to-three items per 30-day window
- Give each item an owner, a date, and one success measure
- Pull at least one item from your Section 3 levers and the 1.3 experiment

WORKSHEET 4 INSIGHT-TO-ACTION FRAMEWORK

Review your insights and levers from Sections 1-3. Choose 2-3 priorities that will have the greatest impact this quarter. For each, write a clear compounding milestone or deliverable, define a success measure, assign an owner, and set a due date for 30, 60, and 90 days.

WINDOW	MILESTONE OR DELIVERABLE	SUCCESS MEASURE	OWNER	DUE DATE
30 DAYS				
30 DAYS				
30 DAYS				
60 DAYS				
60 DAYS				
60 DAYS				
90 DAYS				
90 DAYS				
90 DAYS				

Tips

- First checkpoints inside 30 days
- One experiment result logged by day 30
- One proof or story published by day 60
- One lever change live by day 90

KPI starter template

Monthly signals to consider

Most teams start with three signals and expand to five over time. Include the impact KPI you chose in Section 1.3. Each KPI has one reporting owner who publishes to the dashboard monthly and answers questions about the number.

MARGIN ON ALIGNED OFFERS

What it shows:

profitability of the offers tied to your proposition

How to calculate:

revenue minus direct delivery costs, shown as a percent

Who reports it:

Finance, e.g., FP&A lead

CUSTOMER OUTCOME OR NPS IN PRIORITY SEGMENTS

What it shows:

whether customers in your chosen segments are getting the results you promise

How to calculate:

pick one monthly outcome, or use NPS for those segments

Who reports it:

Customer Experience or Product Analytics lead

EMPLOYEE ENGAGEMENT ON ALIGNED PROJECTS

What it shows:

how energized the teams doing your most aligned work feel

How to calculate:

eNPS or a short pulse question for those teams

Who reports it:

People Operations lead

EXPERIMENT RESULT VS TARGET

What it shows:

whether the 30-day offer experiment from 1.3 hit the goal

How to calculate:

use the success metric and target named in Worksheet 1.3C

Who reports it:

The experiment owner named in 1.3C

PERCENT OF MONTHLY REVIEWS COMPLETED ON TIME

What it shows:

whether your operating cadence is happening as promised

How to calculate:

number of completed monthly reviews divided by number scheduled

Who reports it:

Chief of Staff or Operations lead

MONTHLY KPI READOUT

PURPOSEFUL VALUE PROPOSITION STATEMENT:

KPI	CURRENT	TARGET	OWNER NOTE
Margin on aligned offers			
Customer outcome or NPS in priority segments			
Employee engagement on aligned projects			
Experiment result vs target			
Percent of monthly reviews completed on time			

EXPERIMENT STATUS

OFFER & CHANGE:

METRIC & TARGET:

CURRENT RESULTS:

OWNER & NEXT ACTION:

RISK AND DECISIONS

RISK:

DECISION:

OWNER & DATE:

Lightweight cadence outline

Monthly review, 30 minutes

Pre-read:

Send 24 hours ahead with the one-slide dashboard

Attendees:

CEO or sponsor, owners for the signals and levers, finance, ops

Agenda:

- 10 minutes: Read the three to five signals, call out green, yellow, red
- 10 minutes: Review the 1.3 experiment result and the next step
- 8 minutes: Decisions needed and tradeoffs logged
- 2 minutes: Confirm owners and dates

Outputs to capture:

- Action list with owners and dates
- One row tradeoff log if an exception is approved
- Dashboard updated with a short owner note

Quarterly check-in, 45 minutes

- Refresh signals if needed
- Close the quarter's levers
- Choose next quarter's two levers





SECTION 5

Commitments

What are the commitments?

The commitments are two practices that make progress visible and keep momentum after the final sprint. The first is the **Purposeful Profit Declaration**, a public pledge that formalizes what you will protect and why it matters. The second is the **Team Alignment Check-In**, a short monthly rhythm that keeps the plan, signals, and levers alive in day-to-day leadership.

How to make your commitments

- Publish a one-page **Declaration of Purposeful Profit** so the organization knows what you stand for and what you will protect
- Run a short **Team Alignment Check-In** each month to review progress, track signals, and adjust scope when needed

Commitment 1: The Purposeful Profit Declaration

What is the Purposeful Profit Declaration?

The declaration is a ceremonial pledge that closes the sprint and anchors your team's accountability. By signing, leaders affirm their shared responsibility to embed purpose into business systems and decisions.

How to use the declaration

- Publish internally after Session 3
- Revisit quarterly and update only if the equation changes

DECLARATION OF PURPOSEFUL PROFIT

OUR PURPOSEFUL VALUE PROPOSITION

WHO WE SERVE

- 1.
- 2.

EXPERIMENT WE ARE RUNNING NOW

OFFER

CHANGE

SUCCESS METRIC

OWNER

DATE

PRACTICES WE WILL PROTECT

- 1.
- 2.

MONTHLY SIGNALS TO REVIEW

PERFORMANCE KPI

IMPACT KPI

EXECUTION KPI

COMMITMENT

We recognize that purpose and profit are not opposing forces but interdependent drivers of lasting value. We have defined our proposition, modeled our commitments, and translated them into actionable plans. By signing below, we affirm our collective responsibility to embed purpose into our decisions, behaviors, and systems, holding one another accountable for progress and impact.

SPONSOR SIGNATURE:

LEADERSHIP TEAM SIGNATURES:

DATE:

Commitment 2: The Team Alignment Check-In

What is the Team Alignment Check-In?

The check-in is a practical monthly rhythm that sustains momentum. In 20 minutes, the team reviews commitments, reads the same few signals, names what has moved or drifted, and confirms next actions.

How to run the Check-in

- **Cadence:** Monthly, 20 minutes
- **Attendees:** Sponsor, owners for KPIs and initiatives, chief of staff or ops
- **Agenda:**
 - What we committed to last month
 - What moved and what drifted
 - Metrics review using the one-slide dashboard
 - Decisions needed and tradeoffs logged
 - Next focus and owners

TEAM ALIGNMENT CHECK-IN

WHAT WE COMMITTED TO LAST MONTH

TWO LEVERS

- 1.
- 2.

ITEM

COMPLETED ITEMS

OUTCOMES

SUCCESS METRIC

PROOF

DATE

INCOMPLETE ITEMS

NEW DATE

- 1.
- 2.

MONTHLY METRICS TO REVIEW

CURRENT

TARGET

KPI 1
KPI 2
KPI 3

DECISION

DECISIONS NEEDED

TRADEOFF RATIONALE

SUCCESS METRIC

PROOF

DATE

PRIORITIES

NEXT FOCUS

OWNERS

DATE

- 1.
- 2.
- 3.

Make it stick

You now have a working model for profitable growth with integrity. The equation is defined, the canvas is set, two levers are chosen, and a 30-60-90-day plan with monthly signals is ready to run. The job from here is simple: consistency.

What to do next

- Operate the cadence you set, and read the same few signals each month
- Run the 30-day experiment and publish the result with one proof of purpose in action
- Review your two operating levers at the first checkpoint and adjust scope, not standards
- Keep the canvas current so new leaders can see decisions in two minutes
- Use the decision filter on large deals, new offers, key hires, and suppliers

Keep the promise

- Protect the two practices you said you would not compromise
- Measure one impact KPI next to one performance KPI every month
- Tell the story of decisions made with the equation, so the culture learns

As you run this model, look for the simplest proof that it is taking hold. You may see price realization and margin strengthen on your aligned offers, win-rate and retention climb in your priority segments, engagement hold steady or rise on the teams doing the most aligned work, and decisions become faster and more precise with the rationale captured so others can learn. Those are the signals that you are building profitable growth with integrity.

You have everything you need to get started and keep going. Use the canvas, read the same few signals each month, run one meaningful experiment at a time, and teach the lines you are unwilling to cross. Keep promises small and visible, celebrate proof, and adjust scope rather than standards when pressure rises. If you do this with consistency, purpose will shape how you hire, price, build, and partner, and profit will follow with integrity. Begin now, share what you learn, and let your example set the pace for your team and your industry.

And if you need some support along the way, or are interested in having one of our Purposeful Profit team members facilitate the sessions with your leadership, reach out, we'd be honored to help,

Want to work
together?
Get in touch!

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