

# VISION BUILDING™

## **Answering the 8 Questions:**

1. Core Values
2. Core Focus™
3. 10-Year Target™
4. Marketing Strategy
5. 3-Year Picture™
6. 1-Year Plan
7. Rocks
8. Issues List



# EXAMPLES OF CORE VALUES

- Shows unequivocal excellence
- Continually strives for perfection
- Wins
- Does the right thing
- Compassion
- Shows honesty and integrity
- Is hungry for achievement
- Is enthusiastic, energetic, tenacious, and competitive
- Encourages individual ability and creativity
- Maintains accountability
- Services the customer above all else
- Works hard
- Is never satisfied
- Is interested in continuous self-improvement
- Helps first
- Exhibits professionalism
- Encourages individual initiative
- Is growth-oriented
- Treats everyone with respect
- Provides opportunity based on merit; no one is entitled to anything
- Has creativity, dreams, and imagination
- Has personal integrity
- Isn't cynical
- Exhibits modesty and humility alongside confidence
- Practices fanatical attention to consistency and detail
- Is committed
- Understands the value of reputation
- Is fun
- Is fair
- Encourages teamwork

# CORE VALUES

## Communicating Your Core Values

- Good parenting
- 7 times
- Hire, fire, review, reward, and recognize
- Wordsmith

## “The Speech”/Hiring Process

### **Core Value**

Story  
Analogy  
Example  
History  
Anti-value

### **Core Value**

Story  
Analogy  
Example  
History  
Anti-value

### **Core Value**

Story  
Analogy  
Example  
History  
Anti-value

# CORE FOCUS™

## Your Company's Sweet Spot

- Mission statement, voice, hedgehog concept, Unique Ability®
- Agreement and focus on:
  - Purpose/cause/passion
  - Your niche
- Every decision must be made with your Core Focus™ in mind
- Filtering/internal guiding mechanism (shiny stuff)

## Clarifying Your Core Focus™

1. What is your purpose/cause/passion?

---

---

---

---

---

---

---

2. What is your niche?

---

---

---

---

---

---

---

# PURPOSE/CAUSE/PASSION

## The organization's reason for being

- Comes from the leader
- Beyond money
- Ignites passion
- "People don't lead, purposes do" – Harry Beckwith

## Examples

- **Schechter Wealth Strategies**–To create lifelong relationships and raving fans
- **Image One**–To build a great company, with great people and great results
- **Mary Kay**–To give unlimited opportunity to women
- **Nike**–To experience the emotion of competition, winning, and crushing competitors
- **Disney**–To make people happy
- **EOS Worldwide**–Helping people get what they want from their businesses
- **Mortgage Resource Plus**–To serve our community with passion and excellence
- **pulse220**–Creating "wow" experiences
- **McKinley**–To enrich the quality of life in our communities
- **Greene Espel**–Creating a community within our walls

# PURPOSE/CAUSE/PASSION

## Checklist

1. It's stated in three to seven words
2. It's written in simple language
3. It's big and bold
4. It has an "aha" effect
5. It comes from the heart
6. It involves everyone
7. It's not about money
8. It's bigger than a goal

# NICHE

## What can you do better than anyone?

- Superior skill
- Orville Redenbacher—"Do one thing ..."
- It should be simple

## Examples

- **Walgreens**—Most convenient drugstores
- **Atlas Oil**—Moving gallons
- **EOS Worldwide**—Helping entrepreneurial leadership teams gain traction
- **Orville Redenbacher**—Popcorn
- **Kimberly Clark** (sold the mills)—Paper-based consumer products
- **Autumn Associates**—Writing the right policy
- **ZenaComp**—Accelerating businesses with technology
- **Image One**—Helping companies simplify their printing environments
- **Franklin Homes**—Develop and operate communities that live up to their potential
- **McKinley**—Solving complex real estate problems



# 10-YEAR TARGET™

## Larger-Than-Life Goal

- Jim Collins–BHAG
- 5–30 years out
- SMART goal
- Quantative/Qualitative

## Examples

- **Wal-Mart**–Become a \$125 billion company by the year 2000
- **Nike**–Crush Adidas
- **Autumn Associates**–A referral from every client and every client from a referral
- **EOS Worldwide**–100,000 companies running on EOS
- **Coca-Cola**–Put a Coke within the reach of every human being on the planet
- **McKinley**–20,000 multi-family units owned and/or managed
- **Atlas Oil**–5 billion gallons
- **Schechter Wealth Services**–15% of target market

# MARKETING STRATEGY

## Defining your ideal customer and the message that is most attractive to them

- It must be unique and valuable to your customer
- Marketing, sales, PR, and advertising decisions should be simple when your marketing strategy is clear
- Your marketing strategy must fit with your Core Focus™
- It enables your people to make decisions
- You must be consistent (7 times).

1. Target Market/"The List" \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. 3 Uniques™

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

3. Proven Process \_\_\_\_\_  
\_\_\_\_\_

4. Your Guarantee \_\_\_\_\_  
\_\_\_\_\_

# 3-YEAR PICTURE™

Future date: \_\_\_\_\_

Revenue: \_\_\_\_\_

Profit: \_\_\_\_\_

Measurables: \_\_\_\_\_

## **What does it look like?**

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

Your Role: \_\_\_\_\_

# 1-YEAR PLAN

Future date: \_\_\_\_\_

Revenue: \_\_\_\_\_

Profit: \_\_\_\_\_

Measurables: \_\_\_\_\_

## Goals for the Year

S.M.A.R.T.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_



# COMPANY ROCKS

Future date: \_\_\_\_\_

Revenue: \_\_\_\_\_

Profit: \_\_\_\_\_

Measurables: \_\_\_\_\_

## Rocks for the Quarter

S.M.A.R.T.

WHO

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

# TOOLBOX TABLE OF CONTENTS

The Traction Library .....	1
Organizational Checkup™ .....	2–3
EOS Foundational Tools™ .....	4
The EOS Toolbox™ .....	5
The EOS Model™ .....	6
The Five Leadership Abilities™ .....	7
The V/TO™ .....	8–9
The Accountability Chart .....	10
The Meeting Pulse™ .....	11
The Level 10 Meeting™ .....	12
The Issues Solving Track™ .....	13
Quarterly Rocks.....	14
Rocks–First Step Page.....	15
Company Scorecard.....	16
The 8 Cash Flow Drivers™ .....	17–19
LMA Leadership Questionnaire.....	20
LMA Management Questionnaire.....	21
The People Analyzer™ .....	22
GWC™ .....	23
The 5-5-5™ .....	24
Clarity Break™ .....	25
Delegate and Elevate™ (4 Quadrants).....	26
The Assistance Track™ .....	27
The Trust Builders™ .....	28
Kolbe Profiling .....	29
The 3-Step Process Documenter™ .....	30
Followed By All (FBA) Checklist.....	31
The H/R Process.....	32
“Back to the Basics” Checklist™ .....	33
“Off-Line” Meeting Track™ .....	34
Partnership Rules of the Game™ .....	35
Sales Department Checkup™ .....	36
Merger/Acquisition “Fit”™ .....	37
Getting What You Want .....	38
Compartmentalizing™ .....	39

# THE TRACTION LIBRARY

**WANT EVEN BETTER RESULTS AND MORE  
BUSINESS SUCCESS?**

**IT TAKES YOUR WHOLE TEAM.**

Every person on your team must be equipped with the right information and tools to implement EOS, the Entrepreneurial Operating System® purely throughout your organization. With The Traction Library, your entire company—from leadership to management to employees—will understand their role and be better equipped to help your company succeed.

## AVAILABLE BOOKS

## WHO IT'S FOR



Traction



For everyone



Rocket Fuel



for the visionary  
and the integrator



Get a Grip  
(Traction's Fable)



For the leadership team



How to Be a Great Boss



For leaders, managers,  
and supervisors



What the Heck is EOS?



For all employees,  
managers, and supervisors

Visit [www.eosworldwide.com](http://www.eosworldwide.com) to get everything you need to fully implement EOS in your company today.



# ORGANIZATIONAL CHECKUP™

For each statement below, rank your business on a scale of 1 to 5 where 1 is weak and 5 is strong.

- |   | 1                        | 2                        | 3                        | 4                        | 5                        |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1. We have a clear vision in writing that has been properly communicated and is shared by everyone in the company.                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Our core values are clear, and we are hiring, reviewing, rewarding, and firing around them.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Our Core Focus™ (core business) is clear, and we keep our people, systems, and processes aligned and focused on it.                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Our 10-Year Target™ (big, long-range business goal) is clear, communicated regularly, and is shared by all.                                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Our target market (definition of our ideal customer) is clear, and all of our marketing and sales efforts are focused on it.                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Our 3 Uniques™ (differentiators) are clear, and all of our marketing and sales efforts communicate them.                                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. We have a proven process for doing business with our customers. It has been named and visually illustrated, and all of our salespeople use it. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. All of the people in our organization are the "right people" (they fit our culture and share our core values).                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Our Accountability Chart (organizational chart that includes roles/responsibilities) is clear, complete, and constantly updated.               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Everyone is in the "right seat" (they "get it, want it, and have the capacity to do their jobs well").  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Our leadership team is open and honest, and demonstrates a high level of trust.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

# ORGANIZATIONAL CHECKUP™

- |   | 1                        | 2                        | 3                        | 4                        | 5                        |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 12. Everyone has Rocks (1 to 7 priorities per quarter) and is focused on them.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 13. Everyone is engaged in regular weekly meetings.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. All meetings are on the same day and at the same time each week, have the same agenda, start on time, and end on time.      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 15. All teams clearly identify, discuss, and solve issues for the long-term greater good of the company.                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 16. Our Core Processes are documented, simplified, and followed by all to consistently produce the results we want.             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 17. We have systems for receiving regular feedback from customers and employees, so we always know their level of satisfaction. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 18. A Scorecard for tracking weekly metrics/measurables is in place.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 19. Everyone in the organization has at least one number they are accountable for keeping on track each week.                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 20. We have a budget and are monitoring it regularly (e.g., monthly or quarterly).  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Total number of each ranking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	x1	x2	x3	x4	x5
Multiply by the number above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add all five numbers to determine the percentage score that reflects the current state of your company:  %.

# EOS FOUNDATIONAL TOOLS™

- **Vision/Traction Organizer (V/TO™)**
- **Accountability Chart**
- **Rocks**
- **Meeting Pulse™**
- **Scorecard**

# THE EOS TOOLBOX™

THE  
EOS MODEL™

THE FIVE  
LEADERSHIP  
ABILITIES™

THE  
V/TO™

THE  
ACCOUNTABILITY  
CHART

THE  
MEETING PULSE™

THE  
LEVEL 10  
MEETING™

THE  
ISSUES SOLVING  
TRACK™

ROCKS

SCORECARD

THE  
8 CASH FLOW  
DRIVERS™

LMA™

THE  
PEOPLE ANALYZER™

GWC™

THE  
5-5-5™

CLARITY  
BREAK™

DELEGATE  
AND  
ELEVATE™

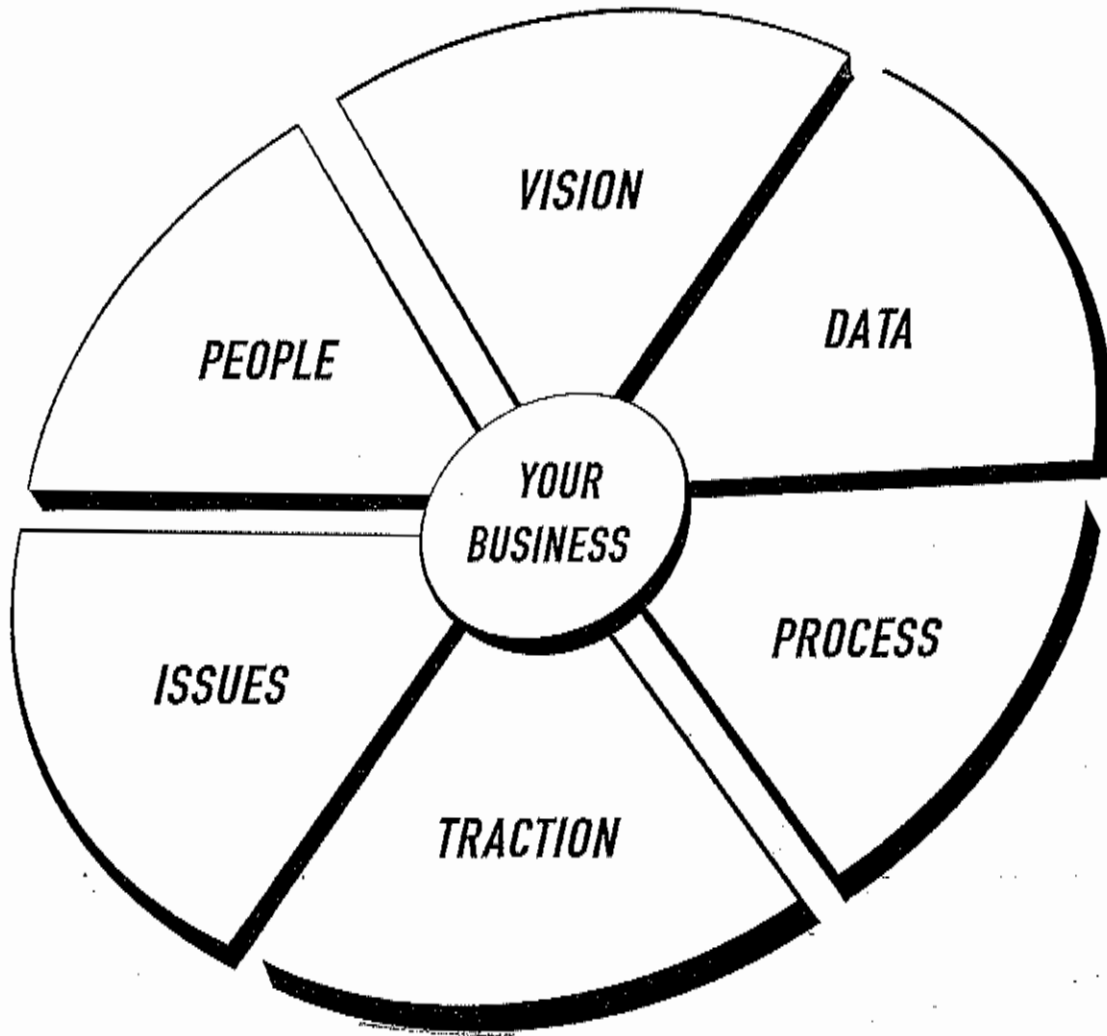
THE  
ASSISTANCE TRACK™

THE  
TRUST BUILDERS™

KOLBE

THE  
3-STEP PROCESS  
DOCUMENTER™

# THE EOS MODEL™



# THE FIVE LEADERSHIP ABILITIES™

Hitting the ceiling is when you, your department, and/or your company stop growing. It's a feeling of being stuck, overwhelmed, and frustrated. You normally scratch your head and ask, "What happened?" This is actually a good sign because all entities that grow go through growing pains, and hitting the ceiling is a growing pain. While this is scientific, breaking through the ceiling is also scientific. Whether or not you break through the ceiling is in direct proportion to your ability to master five disciplines. Those five disciplines are as follows:

Done

## Your ability to simplify

- As an entity grows, so does the amount of information, details, and units. It gets more complex and chaotic.
- You must dumb it down and keep it simple (KISS).
- Simplify the messages, processes, structure, vision, and communication.
- Ask yourself, "Is it as simple as possible?"



## Your ability to delegate and elevate

- Delegate and elevate to your true skill set.
- True growth is a series of delegating and elevating.
- You only have 100 percent of your working time. If it takes 120 percent to do the job well, you must delegate and elevate the extra 20 percent.
- The people you delegate to and elevate must be the right people in the right seats. They must share your core values, and they must get it, want it, and have the capacity to do the job (GWC™). If they don't, you can't delegate and elevate, and you must solve the people issue first.
- "Let go of the vine."



## Your ability to predict

- You must be strong in both long- and short-term predicting.
- Long-term predicting is your ability to predict and plan 90 days and beyond (climb the tree/work "on" the business).
- Short-term predicting is your ability to solve all issues on a daily and weekly basis for the greater good of the company (IDS).
- Otherwise, your organization won't have direction and the ability to prioritize. Issues will pile up and go unresolved, and things will ultimately implode.



## Your ability to systemize

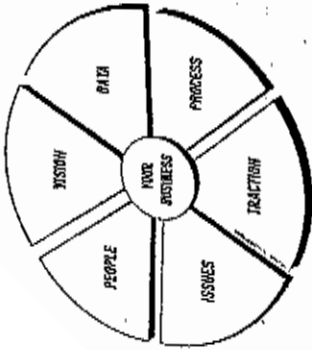
- Systemize simply means to document, simplify, and get everyone following your six to ten core processes that make up your "way" of doing business.
- Document the 20 percent that gets you 80 percent of the results (The Three-Step Process Documenter™).
- Simplify your processes by taking out redundant steps and unnecessary steps and incorporating checklists.
- "Followed by all" means you must train and manage everyone to follow the process – no exceptions.
- As a result, you will create consistency in your organization. With consistency comes simplicity in management, efficiency, better results, predictability, more enjoyment, and more profitability.
- You have to systemize the predictable so that you can humanize the exceptional.



## Your ability to structure

- You must take a big step back, rise above the organization, and see the big picture. As Kurt Gödel said, "You can't be in a system, while at the same time understanding the system you're in."
- Once you have taken a step back, you must decide what is the right and best way to structure the organization to get to the next level. Forget about people, personalities, and egos.
- Use the Accountability Chart to determine the right structure for your organization. As a result you will identify all available seats and determine who is accountable for what.
- Get the right people in the right seats.



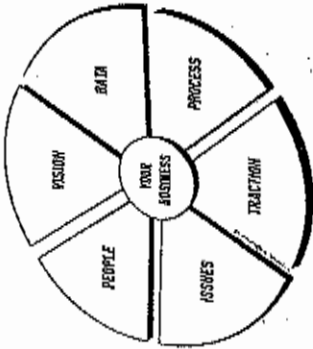


# THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME: \_\_\_\_\_

## VISION

<p><b>CORE VALUES</b></p> <ol style="list-style-type: none"> <li>1. _____</li> <li>2. _____</li> <li>3. _____</li> <li>4. _____</li> <li>5. _____</li> </ol>		<p><b>3-YEAR PICTURE™</b></p>
<p><b>CORE FOCUS™</b></p>	<p>Purpose/Cause/Passion: _____</p> <p>Our Niche: _____</p>	<p>Future Date: _____</p> <p>Revenue: _____</p> <p>Profit: _____</p> <p>Measurables: _____</p> <p>What Does It Look Like? _____</p> <p>• _____</p> <p>• _____</p> <p>• _____</p> <p>• _____</p> <p>• _____</p> <p>• _____</p> <p>• _____</p> <p>• _____</p> <p>• _____</p>
<p><b>10-YEAR TARGET™</b></p>	<p>_____</p> <p>_____</p>	
<p><b>MARKETING STRATEGY</b></p>	<p>Target Market/The List:</p> <p>3 Uniques™: <ol style="list-style-type: none"> <li>1. _____</li> <li>2. _____</li> <li>3. _____</li> </ol></p> <p>Proven Process: _____</p> <p>Guarantee: _____</p>	



# THE VISION/TRACTION ORGANIZER™

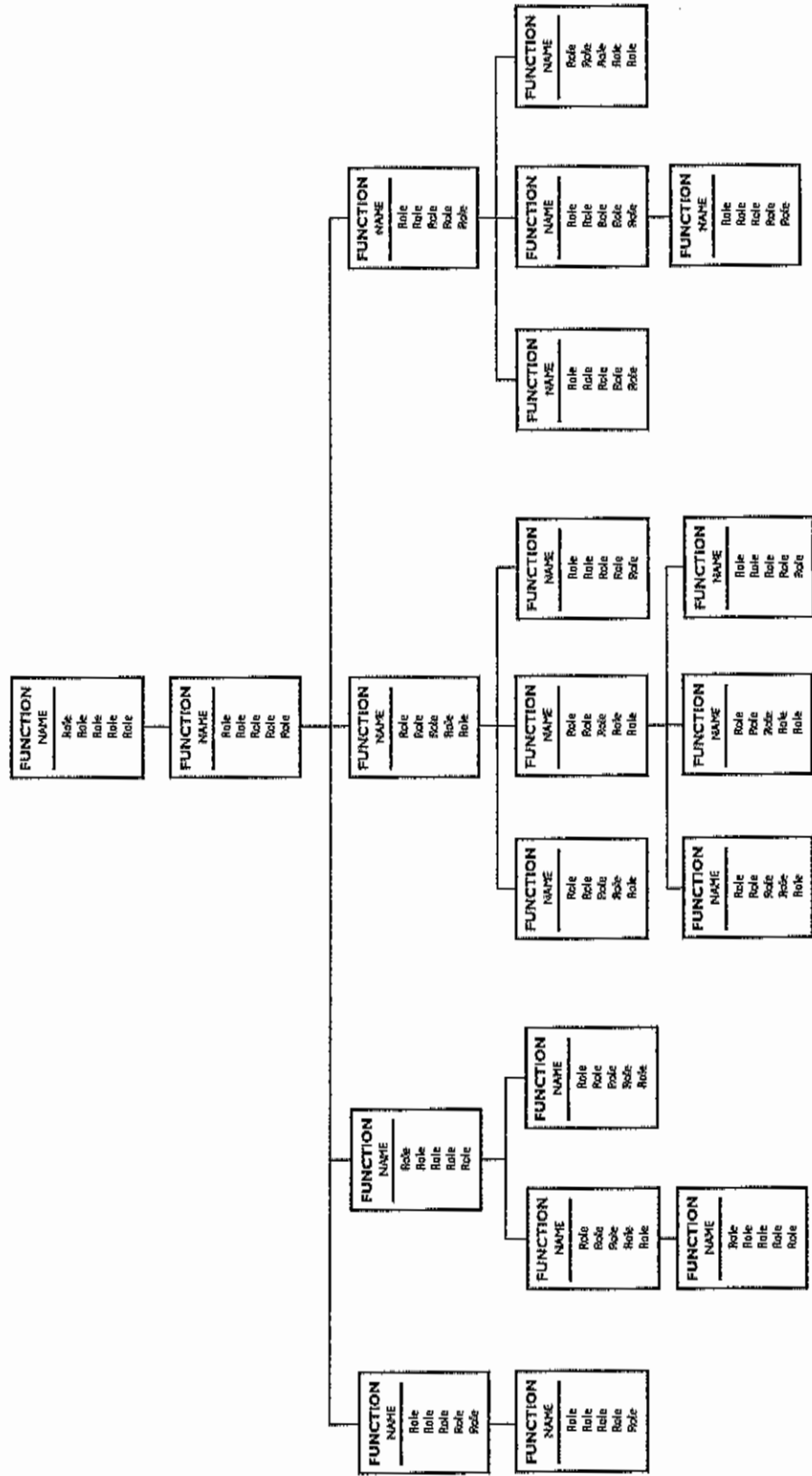
ORGANIZATION NAME: \_\_\_\_\_

## TRACTION

1-YEAR PLAN	ROCKS	ISSUES LIST																																																		
<p>Future date: Revenue: Profit: Measurables:</p> <p><b>Goals for the Year</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>1.</td><td></td></tr> <tr><td>2.</td><td></td></tr> <tr><td>3.</td><td></td></tr> <tr><td>4.</td><td></td></tr> <tr><td>5.</td><td></td></tr> <tr><td>6.</td><td></td></tr> <tr><td>7.</td><td></td></tr> </table>	1.		2.		3.		4.		5.		6.		7.		<p>Future date: Revenue: Profit: Measurables:</p> <p><b>Rocks for the Quarter</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;"></th> <th style="width: 20%;">Who</th> </tr> </thead> <tbody> <tr><td>1.</td><td></td></tr> <tr><td>2.</td><td></td></tr> <tr><td>3.</td><td></td></tr> <tr><td>4.</td><td></td></tr> <tr><td>5.</td><td></td></tr> <tr><td>6.</td><td></td></tr> <tr><td>7.</td><td></td></tr> </tbody> </table>		Who	1.		2.		3.		4.		5.		6.		7.		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>1.</td><td></td></tr> <tr><td>2.</td><td></td></tr> <tr><td>3.</td><td></td></tr> <tr><td>4.</td><td></td></tr> <tr><td>5.</td><td></td></tr> <tr><td>6.</td><td></td></tr> <tr><td>7.</td><td></td></tr> <tr><td>8.</td><td></td></tr> <tr><td>9.</td><td></td></tr> <tr><td>10.</td><td></td></tr> </table> <p style="text-align: right;">                     Prioritize                      • Identify                      • Discuss                      • Solve                 </p>	1.		2.		3.		4.		5.		6.		7.		8.		9.		10.	
1.																																																				
2.																																																				
3.																																																				
4.																																																				
5.																																																				
6.																																																				
7.																																																				
	Who																																																			
1.																																																				
2.																																																				
3.																																																				
4.																																																				
5.																																																				
6.																																																				
7.																																																				
1.																																																				
2.																																																				
3.																																																				
4.																																																				
5.																																																				
6.																																																				
7.																																																				
8.																																																				
9.																																																				
10.																																																				



# THE ACCOUNTABILITY CHART



# THE MEETING PULSE™

## **Increases traction, accountability, communication, team health, and results**

- The moment of truth
- Routine, heartbeat, spike, cadence
- Right hand ... left hand
- Same day, same time, same agenda, starts on time and ends on time
- Keep the circles connected

### **Annual** (2 days)

- Company vision
- 1-year plan

### **Quarterly** (1 day)

- Review V/TO™ and previous quarter's Rocks
- Establish next quarter's Rocks
- Resolve key issues

### **Weekly** (90 minutes)

- Numbers and Rocks on track
- Employee and customer satisfaction
- Resolve issues

# THE LEVEL 10 MEETING™

## The Weekly Agenda

Day: \_\_\_\_\_

Time: \_\_\_\_\_

### Agenda:

Segue	5 Minutes
Scorecard	5 Minutes
Rock Review	5 Minutes
Customer/Employee Headlines	5 Minutes
To-Do List	5 Minutes
<i>-----</i>	
IDS	60 Minutes
<i>-----</i>	
Conclude	5 Minutes
Recap To-Do List Cascading messages Rating (1-10)	

# THE ISSUES SOLVING TRACK™

## **Starting with your issues list, identify the top three issues\*, then follow the Issues Solving Track™**

\*An "issue" is defined as a problem, obstacle, barrier, idea or opportunity. Basically anything unresolved that needs to be discussed.

### **Step 1: Identify**

- The stated problem is rarely the *real issue*.
- You have to dig down to find the *real issue*.
- Don't move forward until you clearly identify the *real issue*.
- Once you have identified the *real issue*, then move to discuss and stay laser focused on the *real issue* until it is solved (no tangents).

### **Step 2: Discuss**

- In an open and honest environment, everyone must share their thoughts, ideas, concerns, and solutions regarding the real issue.
- Discuss and debate.
- Everyone needs to get it all out on the table, but only say it once. If you say it more than once, you are politicking.
- Once everything is on the table and things are getting redundant, it's time for the solution.
- With the greater good in mind, the solution is always simple, though sometimes not easy and sometimes very hard.

### **Step 3: Solve**

- It's more important *that* you decide than it is *what* you decide ... so decide!
- The solution needs to be stated by someone until you hear the sweet sound of agreement.
- Sometimes you will have to go back to the discussion step after the solution is stated because you haven't truly solved it.
- Once everyone agrees, or at least can live with the decision, the action step(s) must be owned by someone and put on the To-Do List, which then are confirmed complete in next week's meeting.

Rule of thumb: On a healthy team, eight out of ten times everyone will agree with the solution. However, two out of ten times they won't, and the Integrator needs to make the final decision. Consensus management does not work and will put you out of business faster than anything. Not everyone will be pleased in these situations, but as long as they have been heard and the team is healthy, they can usually live with it and must support the decision. From there, there must be a united front moving forward.

# QUARTERLY ROCKS

Who

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Name Name Name Name Name

1. \_\_\_\_\_ 1. \_\_\_\_\_ 1. \_\_\_\_\_
2. \_\_\_\_\_ 2. \_\_\_\_\_ 2. \_\_\_\_\_
3. \_\_\_\_\_ 3. \_\_\_\_\_ 3. \_\_\_\_\_
4. \_\_\_\_\_ 4. \_\_\_\_\_ 4. \_\_\_\_\_
5. \_\_\_\_\_ 5. \_\_\_\_\_ 5. \_\_\_\_\_

# ROCKS — FIRST STEP PAGE

## First Step:

By When

Rock 1 \_\_\_\_\_ / \_\_\_\_\_

Rock 2 \_\_\_\_\_ / \_\_\_\_\_

Rock 3 \_\_\_\_\_ / \_\_\_\_\_

Rock 4 \_\_\_\_\_ / \_\_\_\_\_

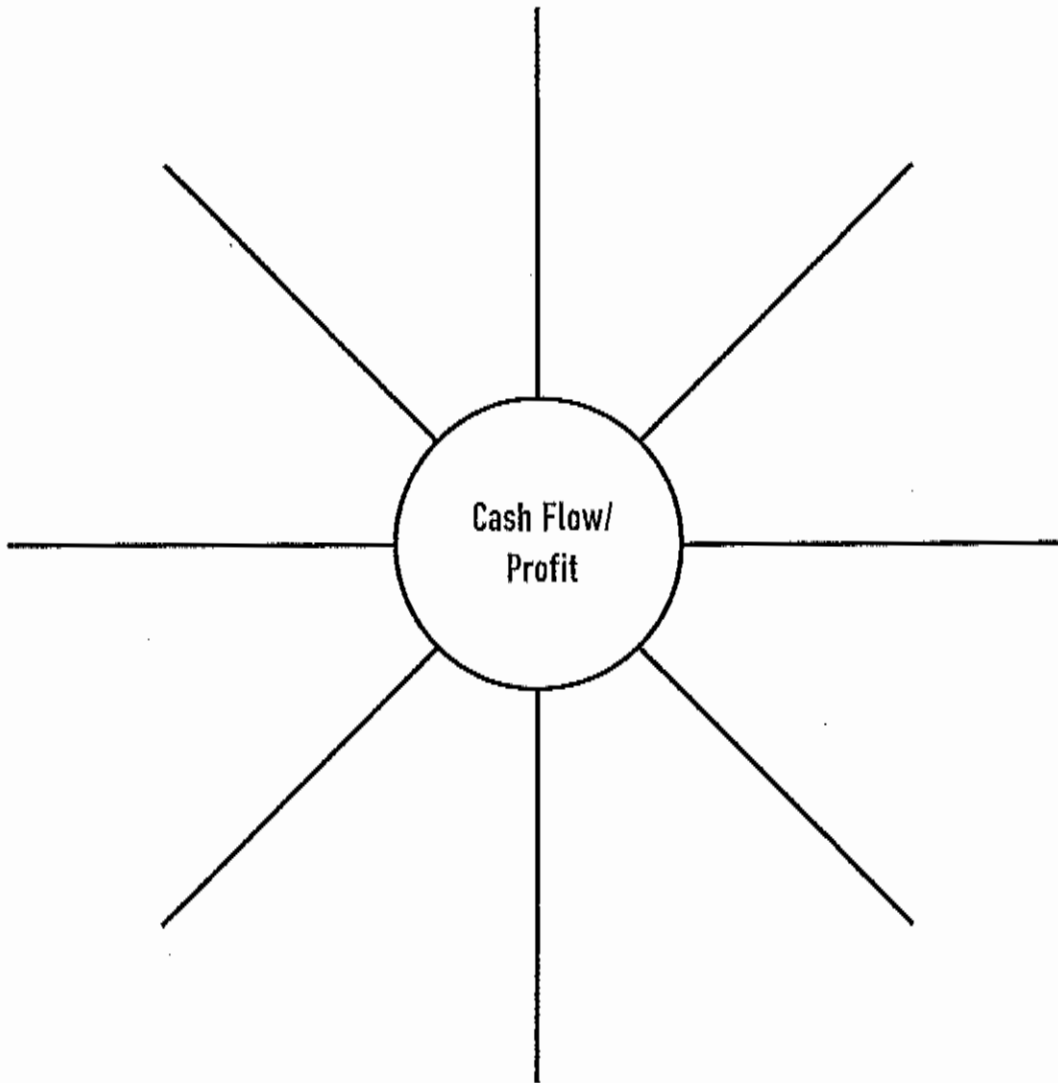
Rock 5 \_\_\_\_\_ / \_\_\_\_\_

Rock 6 \_\_\_\_\_ / \_\_\_\_\_

Rock 7 \_\_\_\_\_ / \_\_\_\_\_

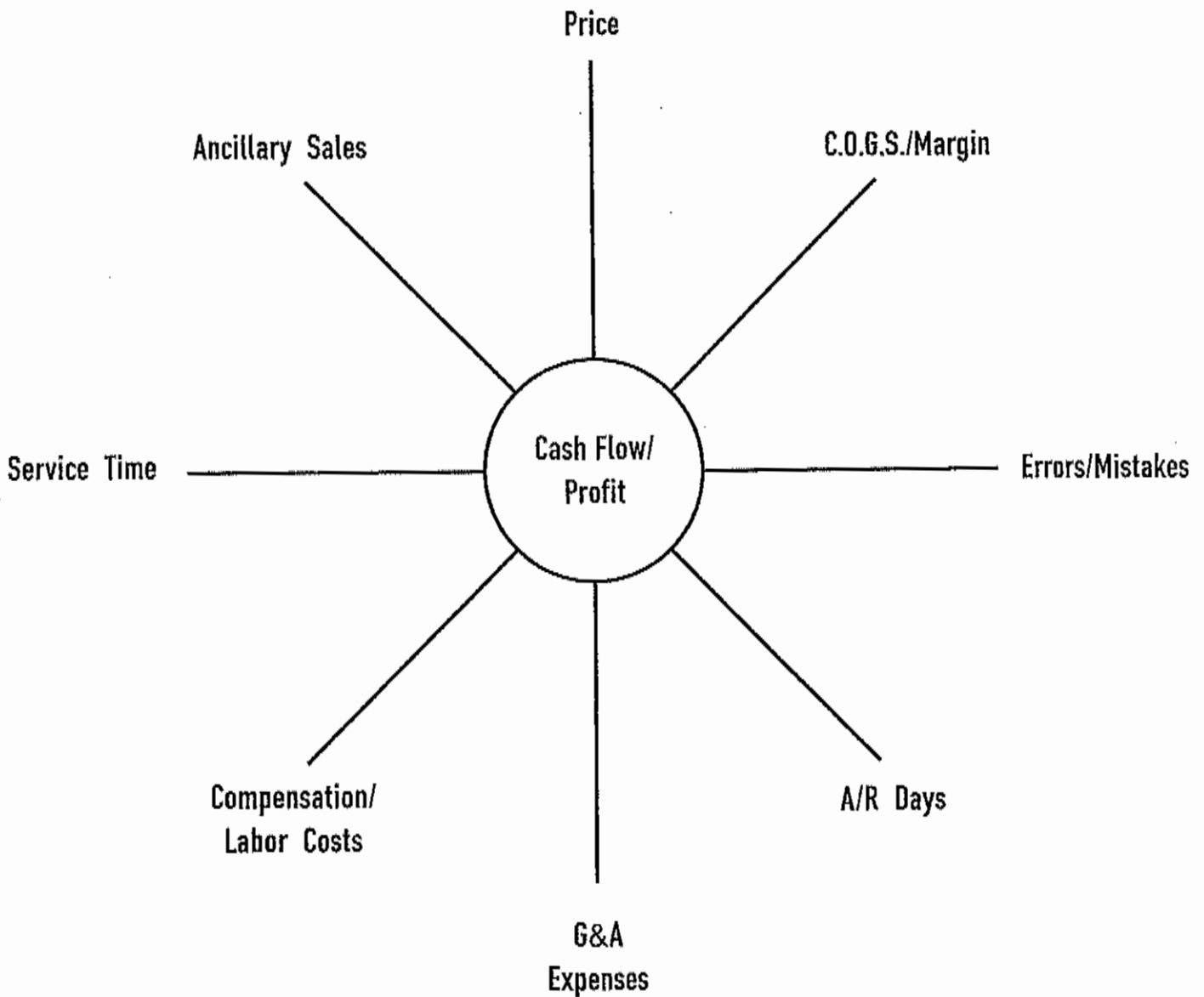


# THE 8 CASH FLOW DRIVERS™

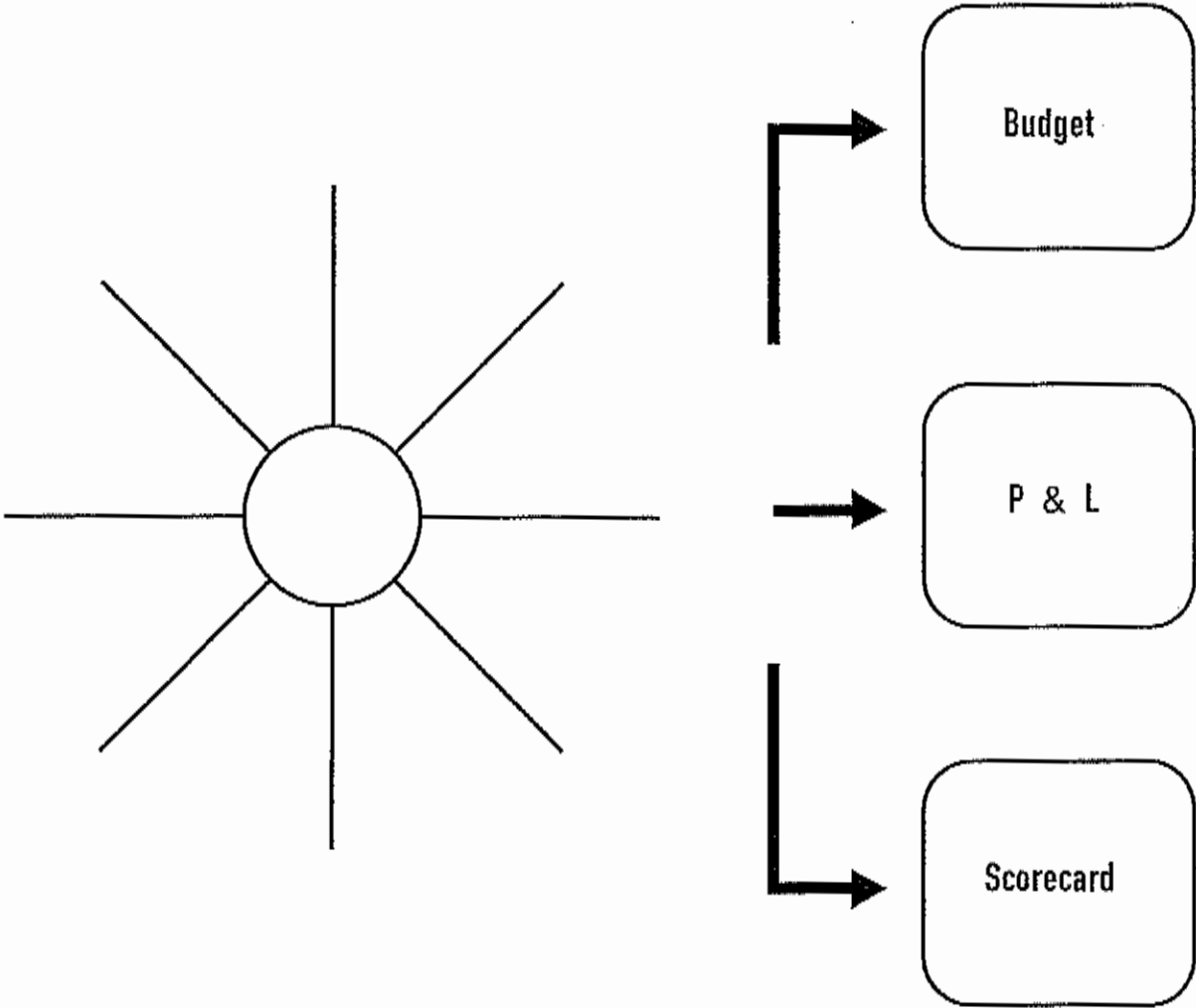




# THE 8 CASH FLOW DRIVERS™



# THE 8 CASH FLOW DRIVERS™



# LEADERSHIP

	Y	N
<b>I am giving clear direction</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Creating the opening</li><li>• A compelling vision</li><li>• V/TO™</li></ul>		
<b>I am providing the necessary tools</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Resources</li><li>• Training</li><li>• Technology</li><li>• People</li><li>• Time and attention</li></ul>		
<b>I am letting go of the vine</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Delegate and Elevate™</li><li>• GWC™</li></ul>		
<b>I act with the greater good in mind</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Company vision (V/TO™)</li><li>• My actions</li><li>• My decisions</li><li>• Walk the talk</li><li>• Company needs first</li></ul>		
<b>I am taking Clarity Breaks™</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• “On” the business</li><li>• Creating clarity</li><li>• Protecting my confidence</li><li>• Daily, weekly, or monthly</li><li>• Blank legal pad</li></ul>		

# MANAGEMENT

## When managing my direct reports:

	Y	N
<b>I keep expectations clear</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Mine and theirs</li><li>• Roles, core values, rocks, and measurables</li></ul>		
<b>I am communicating well</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Me and them</li><li>• You know what is on each other's mind (no assumptions)</li><li>• 2 emotions</li><li>• Question-to-statement ratio</li></ul>		
<b>I have the right meeting pulse</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Even exchange of dialogue</li><li>• Reporting measurables</li><li>• Keeping the circles connected</li></ul>		
<b>I am having quarterly conversations</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• The 5-5-5™</li><li>• The People Analyzer™ (core values and GWC™)</li></ul>		
<b>I am rewarding and recognizing</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Give positive and negative feedback quickly (24 hours)</li><li>• Criticize in private, praise in public</li><li>• Be their boss, not their buddy</li><li>• The three-strike rule</li></ul>		



## Are each of your people in the right seat?

If they are not, you will be frustrated, they will be frustrated, and, as a result, you will never be able to completely delegate and elevate. You will always be forced to do their work and will not be able to let go of the vine.

Function Name
• _____
• _____
• _____
• _____
• _____

In order for someone to be in the right seat, to step up, and to ultimately fill the opening you have created, he or she must get it, want it, and have the capacity to do the job. If any one of the three is a "no," it is never going to happen ... 99.9 percent of the time.

### Do they:

Y      N

#### Get it?

- Do all of the neurons in his or her brain connect when you explain and they do the job?
- Does he or she get all of the ins and outs of the position?
- Not everyone gets it, and it's not a bad thing. He or she just needs to be in a different seat.

#### Want it?

- Does he or she genuinely want to do the job?
- Does he or she get up every morning wanting to do it?
- You can't pay, motivate, force, or beg him or her to want it. He or she has to want it on his or her own.
- Sometimes people get it and have the capacity, but just don't want it anymore.

#### Capacity?

- Does he or she have the mental, physical, spiritual, time, knowledge and emotional capacity to do the job?
- Sometimes this one is negotiable. While not getting it or wanting it are deal-killers, a problem of capacity can be solved, although rarely. If you believe the person can gain the capacity and you are willing to invest the time, resources, and energy for him or her to do so, do it. It is just that most growing organizations don't have the luxury of waiting one to three years for someone to gain the capacity and need the seat filled completely now.

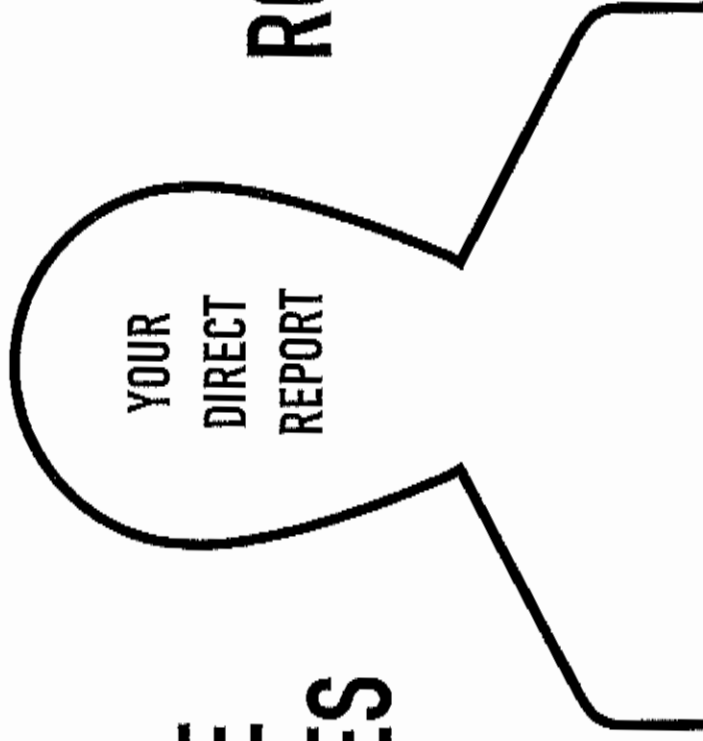
**THE 5-5-5™**

**ROCKS**

**CORE  
VALUES**

**YOUR  
DIRECT  
REPORT**

**ROLES**



# CLARITY BREAK™

Keeping your head clear, your confidence high, and your focus strong is vital in maintaining forward momentum. Most leaders spend most of their time overwhelmed, tired, and buried in the day-to-day routine, unable to see beyond tomorrow. As a result, they don't solve problems as well as they could, they don't lead their people as well as they could, and they're not a good example for them. Great leaders have a habit of taking quiet thinking time. That means escaping the office on a regular basis for an hour or so. By working on yourself and the business, you will rise above feeling frustrated and overwhelmed to a clearheaded and confident state. As a result, when you come back into the business, you will be laser-focused and in the right leadership frame of mind.

You can do this wherever works best for you, but it should never be in your office. You have to go to a place where your thoughts are uninterrupted. You can do this daily, weekly, or monthly, whichever works best for you. Some clients have a favorite place in the morning on their way to work. Sam Cupp would do it for 30 minutes in his den every morning. I do it once a week for two hours in a coffee shop. I knew a man who would take about half a day every month at the library, and that did the trick for him.

Such free time to think is vital. As Henry Ford said, "Thinking is the hardest work there is, which is probably the reason why so few engage in it." Take the opportunity to review your V/TO™, review your plans, read, think strategically, look at the EOS Model™, or fill out the Organizational Checkup. What I recommend for someone who doesn't know what to do is to sit with a blank legal pad and a pen. I promise you, through this simple exercise, all of the right thoughts will come to mind. It's important that none of the work you're doing is busywork. This is not an opportunity to play catch-up.

After taking a Clarity Break™, you will come back into the business clear, focused, and confident. You'll be ready for anything. You'll solve problems better, you'll be clearer with your people, and you'll set a better example. When you're having trouble solving a problem, check out for a Clarity Break™. Take a deep breath, and put the necessary time into thinking clearly through the problem.

To start, pick a one-hour block of time next week, block it out, and do it. If you wait around for the right time to appear, it never will. It must be an appointment that you schedule with yourself. Give it a try. Just do one. I have yet to have one person tell me that it was a waste of time. You might be wondering where you're going to find an hour. The amazing paradox is that the hour you spend will save you more than that hour later because of the clarity that it creates. You end up being much more efficient and effective.



# DELEGATE AND ELEVATE™

**Love/Great**

---

---

---

---

---

---

---

---

---

---

**Like/Good**

---

---

---

---

---

---

---

---

---

---

**Don't Like/Good**

---

---

---

---

---

---

---

---

---

---

**Don't Like/Not Good**

---

---

---

---

---

---

---

---

---

---

# THE ASSISTANCE TRACK™

## Minimum estimated time saved

### Step 1: Delegate and Elevate™

- Do the Delegate and Elevate™ (4 quadrants) exercise, and delegate and elevate everything in the bottom two quadrants.

Exponential

### Step 2: The Stack

- Touch everything only once. Put anything that can be delegated in "The Stack" at the end of your desk in preparation to hand it off.

2–5 hours  
per week

### Step 3: The Daily Meeting

- Every day at the same time, have a 15-minute meeting to hand off "The Stack," answer any questions for the day, and communicate any and all issues.

1 hour  
per week

### Step 4: The E-mail System

- Turn your e-mail over to someone you trust.
- There are 3 types of e-mails:
  1. **Junk**—Have them clear it out.
  2. **Informational**—Decide how you want to receive information, typically on a weekly or monthly basis during your reading time.
  3. **Response**—Response e-mails fall into two categories:
    - A. Where they can respond (50 percent).
    - B. Where you respond (50 percent), simply decide how you want to receive your response e-mails (e.g., verbally, private e-mail, voice mail, print)

1–5 hours  
per week

### Step 5: Your Schedule

- Turn your schedule over to someone to do your scheduling for you.

1 hour  
per week

# THE TRUST BUILDERS™

## **Our team has done the following:**

**Read *The Five Dysfunctions of a Team***



**Meeting Pulse™**



- 2-day annual, 1-day quarterlies, and weekly Level 10's
- Same day, same time, same agenda, start on time and end on time

**Personal histories exercise**



**One thing (recommended annually)**



- Most admirable trait
- Start or stop

**Social fun**



- Dinner, bowling, go-karting, WhirlyBall, etc.

**Kolbe profiles**



- [www.kolbe.com](http://www.kolbe.com)

**Myers-Briggs/DISC profiles**



- [www.discoveryourpersonality.com](http://www.discoveryourpersonality.com) (Myers-Briggs)
- DISC (various sources)

**Strengths Finder profiles**



- [www.strengthsfinder.com](http://www.strengthsfinder.com)

**Personal issues solving session**



- Three (3) strengths and weaknesses
- Follow the Issues Solving Track™

**“Clear the air” meeting**



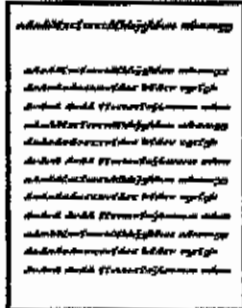
- What's \_\_\_\_\_ you off?

# KOLBE PROFILING

## **Instructions for taking the Kolbe A™ Index:**

- Set aside one uninterrupted hour to fully get the value of the Kolbe.
- Go to the Kolbe website at [www.kolbe.com](http://www.kolbe.com)
- Click on the “Take the Kolbe A index”; it will take you directly to the index.
- After you take the Index, your results will appear.
- Print out your results and bring them to your next session.
- Spend 20 minutes reviewing your results and be sure to listen to the audio clips on the appropriate screens.
- At the end of the “Time and Energy” section, under “Expand Your Horizons,” is a link for you to order the audio CD that further discusses your specific natural strengths. Please make note of the title of this audio CD and make sure to listen to it at least twice. These audios are also available at Audible.com.
- To e-mail your results, click on the Share Your Results button visible once you complete the questions. Once you click the icon/button, you will be able to enter the e-mail address of the person that you would like to send a copy to and that person will receive the report.

# THE 3-STEP PROCESS DOCUMENTER™

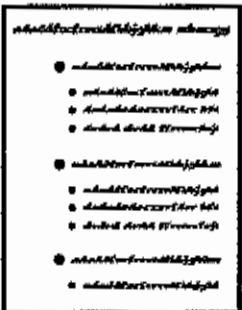


## Step 1 - Identify

- Identify your *handful* of core processes
- Make a list (HR, Marketing, Sales, Several Operations, Accounting, Customer Service/Retention, etc.)
- Give each of them a name, with everyone agreeing to use that name

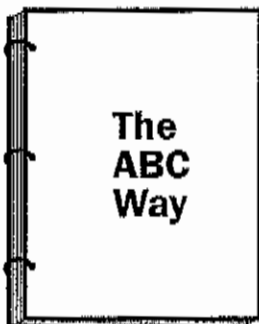
## Step 2 - Document

- One at a time, record the major steps in each core process:
  - Favor a linear/chronological approach
  - Each major step should be supported by 1-5 sub-points defining the who/what/where/when/how
  - Keep it simple (the 20/80 approach) Each core process should be fully documented in 1-5 pages
- Review and approve each core process – every member of the leadership team must agree *this* is the right way to do it every time
- Repeat this step for every core process



## Step 3 - Package

- Combine each documented and simplified core process into a binder, online folder or other accessible, easy-to-find package
- Turn your list of core processes (from Step 1) into your table of contents
- Give it a name. The ABC Way, Franchise Model, Operating Model, SOP, Circle of Life, etc.



# FOLLOWED BY ALL (FBA) CHECKLIST

With your core processes documented, simplified, packaged and approved by the leadership team, it's now time to get them followed by all. This will create consistency, scalability, efficiency, ease of management, more fun, peace and profitability for your organization. Simply follow this four-part checklist:

## **Train**



- Train everyone who will perform one or more of the steps in each process
- Train in Level 10 meetings, special training sessions or learning management systems

## **Measure**



- Measure performance on the appropriate scorecard (company/department)
- Confirm compliance with the steps in each process
- Confirm that activities required for success are being done properly, and with enough frequency to achieve the goals

## **LMA**



- Lead, manage and hold everyone accountable, everyone to follow the process
- Keep scorecard numbers on-track
- Call out and IDS issues immediately as they arise – no exceptions

## **Update**



- Update core processes regularly
- As issues arise, sometimes the process is the root cause and must be revised
- Cleanup, simplify and retrain one core process per quarter

# THE H/R PROCESS

## **The Search**

- Define role/job description/salary (the seat in the accountability chart)
- Decide search medium
- Begin search
- E-mail blast to sphere/peers

## **Interviewing**

- Screen résumés
- Initial interview/profiling tools
- 2nd interview
- Check references
- CEO interview

## **Hiring**

- 8-hour on-the-job trial
- Decision
- 90-day trial

## **Orientation**

- H/R policy/review employee manual
- Benefits review/forms
- Job training
- CEO orientation (company story/core ideology)

## **Quarterly Conversations**

- What's working, what's not?
- Review the 5-5-5™/People Analyzer™ (RPRS)
- Review LMA questionnaires
- Delegate and elevate opportunities
- Update accountability chart if necessary

## **Annual Reviews**

- Manager fills out People Analyzer™, including GWC in preparation for the review
- Document the review and have it signed by all parties
- File the review with the H/R department

## **Termination**

- 3-strike system (30-30-30)
- Terminate upon 3rd strike
- Contact legal counsel
- Meet with employee/have H/R present
- Exit interview
- Document termination and have it signed by all parties

# “BACK TO THE BASICS” CHECKLIST™

## When you are “hitting the ceiling,” you must:

- **Simplify**—Is everything as simple as possible?
- **Delegate**—Are you or any of your people above capacity to do the job well?
- **Predict** (short term)—Are you solving daily and weekly problems as they arise for the long-term greater good of the company?
- **Systemize**—Are your core processes documented, simplified, and followed by all?
- **Structure**—Is the right accountability chart in place?

## Are all of your direct reports the right people in the right seats? Y N

- If they are not, this must be your #1 priority.

## Are all of your meetings healthy, productive, and necessary? Y N

- Is the meeting necessary?
- All participants are open and honest (sharing all issues for the week), (high level of trust).
- 50 percent of the meeting time spent on issue solving.
- Solving issues forever/greater good (no duct tape).

## Do you and your people have enough time to do the job well? Y N

- You/your people only have 100 percent of their working time.
- If it takes more than 100 percent of your/their time to do the job well (5 bullets in the accountability chart), you/they must delegate and elevate.
- No “Suck it up” attitude; you will eventually burn people out.
- Assistance Track™
  1. Delegate and Elevate™
  2. The stack
  3. Daily meetings
  4. E-mail system
  5. Schedule
- Have you realized all efficiencies (process, procedure, stop doing list, etc.)?

## Is everyone following the process? Y N

- If the process is slowing things down, immediately solve the bottlenecks to speed it back up; there shouldn't be any delays as a result of the process.

## Are you taking Clarity Breaks™? Y N

- The only way to see the big picture, stay focused, confident, and clear.
- Kurt Gödel's Law—“You can't be in a system, while at the same time understanding the system you're in.”



## “OFF-LINE” MEETING TRACK™

- Step 1. **What is the objective?** Whoever is calling the meeting, have him or her decide the objective of the meeting in advance. What must be accomplished by the end of this meeting?
- Step 2. **What is the agenda?** What are the steps and topics you are going to follow and cover to achieve the objective?
- Step 3. **What prep work needs to be done?** Be clear with everyone in advance as to what work needs to be done prior to the meeting so that everyone comes fully prepared. This will create much more efficient and productive meetings.
- Step 4. **Send out, in advance, to all participants the objective, agenda, and prep work.** Give plenty of prep time.
- Step 5. **Begin the meeting by stating the objective and the agenda.** Make sure everyone is clear about why you are together and what needs to be accomplished.

# PARTNERSHIP RULES OF THE GAME™

## **As Owners “On”:**

- Formal quarterly meetings
- Monthly “Same Page” meetings
- Straight line communicate
  - No being vague
- 50/50 dialogue
  - Listen/let them talk
- United front “in” the business
- Issues must be solved before bringing them “in” the business
  - All company issues are fair game

## **As Employees “In”**

- United front in the presence of all others
- Integrator makes final decisions “in” the business
  - Any disagreements handled in owners meeting
- No politics, pulling, or end-runs with other people
- Complete accountability for the role/play by the rules
  - You can be fired

# SALES DEPARTMENT CHECKUP™

## You must have the following in place:

### **A sales manager (one person accountable)**

- Right person, right seat
- GWC™



### **A clear marketing strategy, plan, and materials**

- Target market/"The list"
- 3 Uniques™
- Proven process
- Guarantee



### **A clear sales process**

- Incorporate referral generation if applicable



### **Your sales culture and approach defined**

- Transaction vs. relationship
- Salary vs. commission
- Product/service/commodity/experience
- Decide and be consistent



### **Managing the numbers/activity**

- As early in the sales process as possible
- Using a scorecard



### **The right people in the right seats (RPRS)**

- Core values
- Five roles in the accountability chart



### **Minimum standards clear with all salespeople**

- The rules of the game
- Numbers, sales volume, core values, five roles, etc.
- Everyone has a number



### **Absolute consistency**

- Process, message, materials, Meeting Pulse™, etc.
- Each sales person has a V/TO™



# MERGER/ACQUISITION “FIT”™

## **Cultural Fit**

- Core values
- People (RPRS)
- Management system (EOS®)
- Personality/Ego
- Can you work together?
- Who’s the integrator?
- Follow the rules of the game

## **Strategic Fit**

- Accountability chart
- V/TO™ (1, 3, 10 Year)
- Core Focus™
- Balance of talent
- Reduced expenses
- Increase bottom line
- Synergies
- Efficiencies



# COMPARTMENTALIZING™

**1 YEAR    90 DAY    7 DAY    ISSUES**

<b>GOALS</b>	<b>ROCKS</b>	<b>TO-DO'S</b>	<b>LONG SHORT</b>				
			<table border="1"><tr><td><b>+90 DAYS</b></td><td><b>-90 DAYS</b></td></tr><tr><td><b>V/TO™</b></td><td><b>L10</b></td></tr></table>	<b>+90 DAYS</b>	<b>-90 DAYS</b>	<b>V/TO™</b>	<b>L10</b>
<b>+90 DAYS</b>	<b>-90 DAYS</b>						
<b>V/TO™</b>	<b>L10</b>						

Watch the Compartmentalizing video at

[www.eosworldwide.com/compartmentalize](http://www.eosworldwide.com/compartmentalize)