ARE YOU RUNNING YOUR BUSINESS

OR

IS YOUR BUSINESS RUNNING YOU?

NOTES

NOTES

THE EOS MODEL™

VISION

DATA

PEOPLE

YOUR BUSINESS

PROCESS

ISSUES

TRACTION

EOS®
Entrepreneurial Operating System®
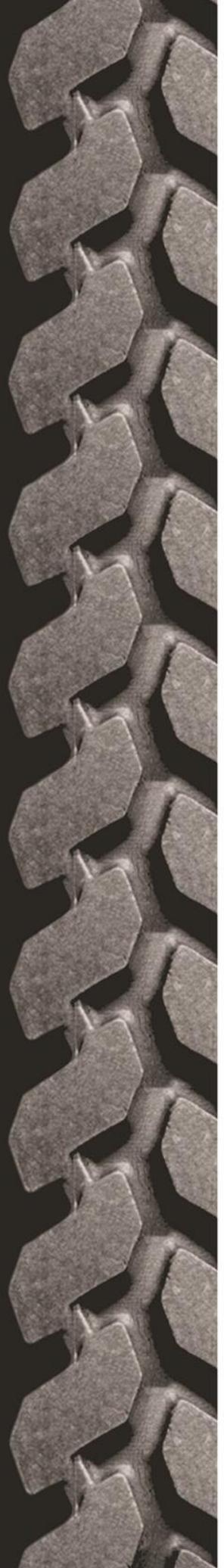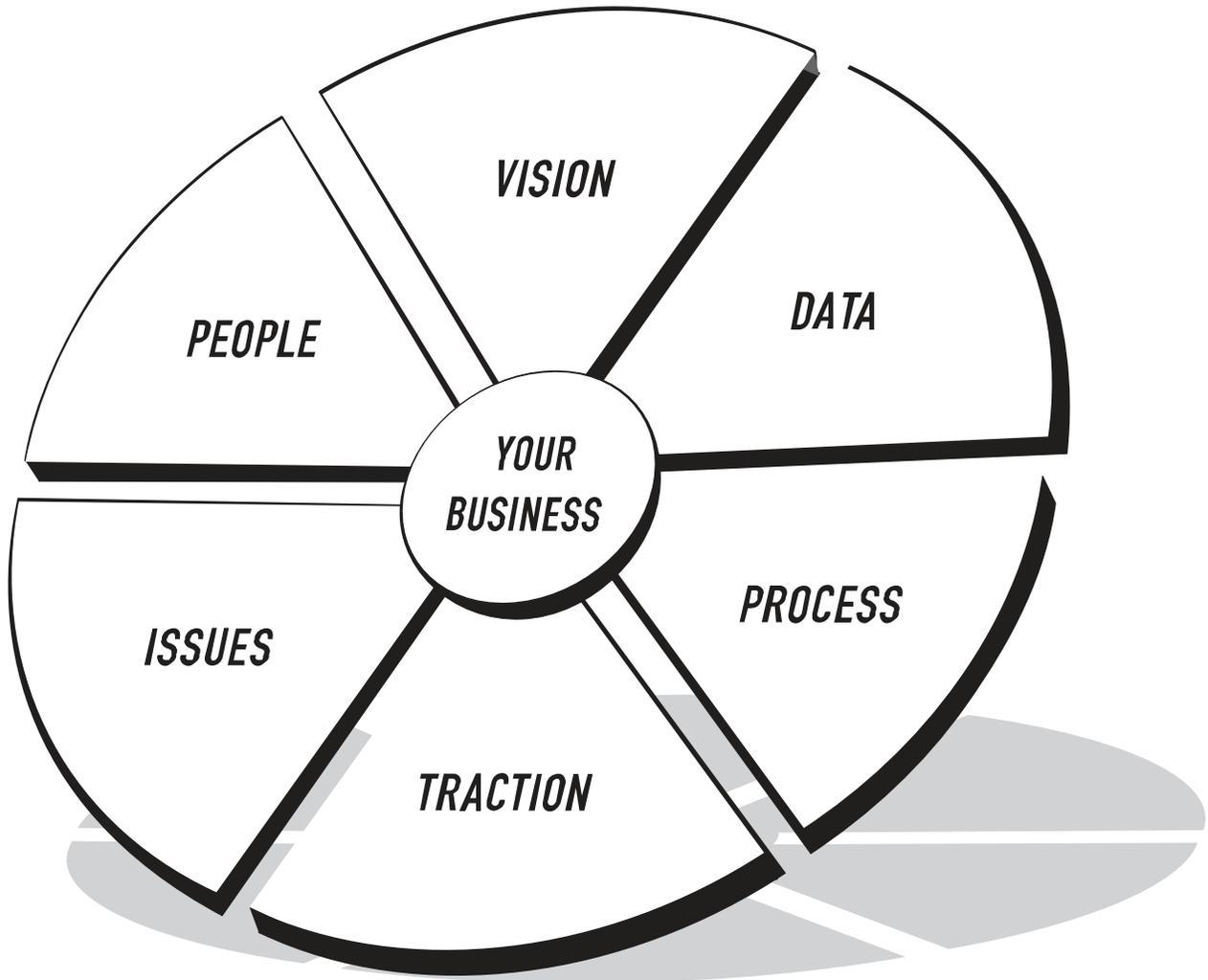
THE VISION/TRACTION ORGANIZER™

THE EOS MODEL™
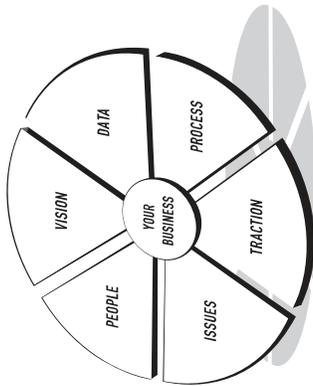
ORGANIZATION NAME:

VISION

CORE VALUES	1. 2. 3. 4. 5.
CORE FOCUS™	Purpose/Cause/Passion: Our Niche:
10–YEAR TARGET™	

MARKETING STRATEGY	Target Market/"The List":
	
	Three Uniques: 1.
	                2.
	                3.
	
	Proven Process:
	
	Guarantee:

3–YEAR PICTURE™

Future Date:

Revenue:

Profit:

Measurables:

What Does It Look Like?

• • • • • • • • • • • •

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THE VISION/TRACTION ORGANIZER™

THE EOS MODEL™
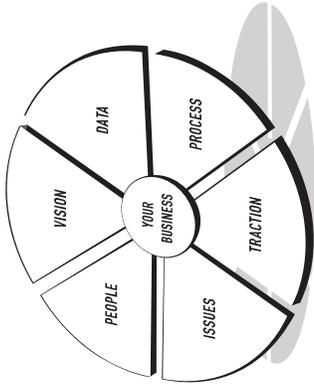
ORGANIZATION NAME:

TRACTION

1-YEAR PLAN

Future date:

Revenue:

Profit:

Measurables:

Goals for the Year

1.	
2.	
3.	
4.	
5.	
6.	
7.	

ROCKS

Future date:

Revenue:

Profit:

Measurables:

Rocks for the Quarter — Who

1.		
2.		
3.		
4.		
5.		
6.		
7.		

ISSUES LIST

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Prioritize
- Identify
- Discuss
- Solve

EXAMPLES OF CORE VALUES

- Unequivocal excellence
- Continually strive for perfection
- Love to win
- Do the right thing
- Compassionate
- Exhibit honesty and integrity
- Hungry for achievement
- Enthusiastic, energetic, tenacious, and competitive
- Accountable
- Service the customer above all else
- Work hard
- Never satisfied
- Continuous self-improvement
- Help first
- Exhibit professionalism
- Encourage individual initiative
- Growth-oriented
- Treat everyone with respect
- Provide opportunity based on merit; no one is entitled to anything
- Have creativity, dreams, and imagination
- No cynicism
- Humbly confident
- Fanatical attention to consistency and detail
- Exhibit loyalty and commitment
- Understand the value of reputation
- Fun
- Fair
- Encourage teamwork

THE PEOPLE ANALYZER™

NAME

The Bar									

Rating: +   +/−   −

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THE ACCOUNTABILITY CHART

Visionary
- 20 Ideas
- Creativity/Problem Solving
- Big Relationships
- Culture
- R&D
- More on Emotion

Integrator
- Lead, Manage, Accountability (LMA)
- P&L/Business Plan
- Remove Obstacles & Barriers
- Special Projects
- Core Processes
- More on Logic

Sales/Mktg
- LMA
- Sales/revenue goal
- Selling
- Marketing
- Sales & Marketing Process

Operations
- LMA
- Customer Service
- Process Management
- Making the Product
- Providing the Service

Finance
- LMA
- AR/AP
- Budgeting
- Reporting
- HR/Admin
- IT
- Office Management

GWC™

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, 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.

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COMPANY SCORECARD

WHO	MEASURABLES	GOAL	5-Jan	12-Jan	19-Jan	26-Jan	2-Feb	9-Feb	16-Feb	23-Feb	1-Mar	8-Mar	15-Mar	22-Mar	29-Mar

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SCORECARD MEASURABLES

Sales & Marketing:
New leads
Opportunities (#, $ or both)
Sales calls
Sales meetings/presentations
Proposals
Closed business
Close ratio
Ancillary sales (accessories, warranties,
        service plans...)
Expected revenue (a pipeline number)
Actual revenue
YTD revenue (% to plan)
Errors (estimating, ordering, design...)
% of asking price received
Cost of sales (salaries + commissions/
revenue produced)
Page views
Clicks
Redeemed coupons
Walk-ins/call-ins
Info requests
Web conversions

Operations:
Run rate/units per hour
Errors
Customers' problems/complaints
Defect rate (% of units produced late,
over budget or out of spec)
Breakage/waste
Bin, sort, inventory
Delivery, shipping
Utilization rates (for both labor and
machinery)
Customer rating
Warranty claims
Overtime
Unbillable hours
Cost per unit
Average hourly rate

Finance:
Weekly revenue
Cash balance
A/R
A/R>45 or 60 ($ or % of total
receivables)
A/P
Errors (input, billing, reporting...)
YTD gross profit margin
YTD net profit margin
Employee satisfaction
Systems uptime (internal IT)
Employee sick days
Late employees
Employees not hitting their numbers
Open positions
Payroll

THE ISSUES SOLVING TRACK™

Starting with your issues list, identify the top three issues, then follow the Issues Solving Track

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.

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CORE PROCESSES

- **People Process**

- **Marketing Process**

- **Sales Process**

- **Operations Processes**

- **Accounting Process**

- **Customer–Retention Process**

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THE LEVEL 10 MEETING™

The Weekly Agenda

Day: _____   Time: _____

<u>Agenda:</u>

Good News	5 Minutes
Scorecard	5 Minutes
Rock Review	5 Minutes
People Headlines	5 Minutes
To-Do List	5 Minutes

~~adadfxcfestdfibjghba ahawgg~~
~~dadadadaczxvfdec bfdev egefgb~~
~~dvded dvdd ffevtecfajfemmm mba~~

IDS (Issues list)	60 Minutes

~~adadfxcfestdfibjghba ahawgg~~
~~dadadadaczxvfdec bfdev egefgb~~
~~dvded dvdd ffevtecfajfemmm mba~~

Conclude	5 Minutes

    Recap To-Do List
    Cascading messages
    Feedback (1-10)

THE FOUNDATIONAL TOOLS™

- **Vision/Traction Organizer (V/TO™)**

- **Accountability Chart**

- **Rocks**

- **Meeting Pulse™**

- **Scorecard**

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.

HERE'S HOW!

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** to get everything you need to fully implement EOS in your company today.

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igostrategy
**Unternehmensführung.
So wird's gemacht.**

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Helping organizations clarify, simplify and achieve their vision

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