



GET A GRIP ON YOUR BUSINESS

Six Keys to Getting What You Want
from your Entrepreneurial Company

Lorie Clements, Expert EOS Implementer®



AGENDA

- **Get REAL**
- **Keep it SIMPLE**
- **Get RESULTS**

GET
REAL



GET REAL

- You
- Me
- Brief history



FRUSTRATIONS

- Control
- Profit
- People
- Hitting the ceiling
- Nothing's working

KEEP IT
SIMPLE

THE EOS MODEL®



“Vision without traction
is hallucination.”

–GINO WICKMAN

THE EOS MODEL



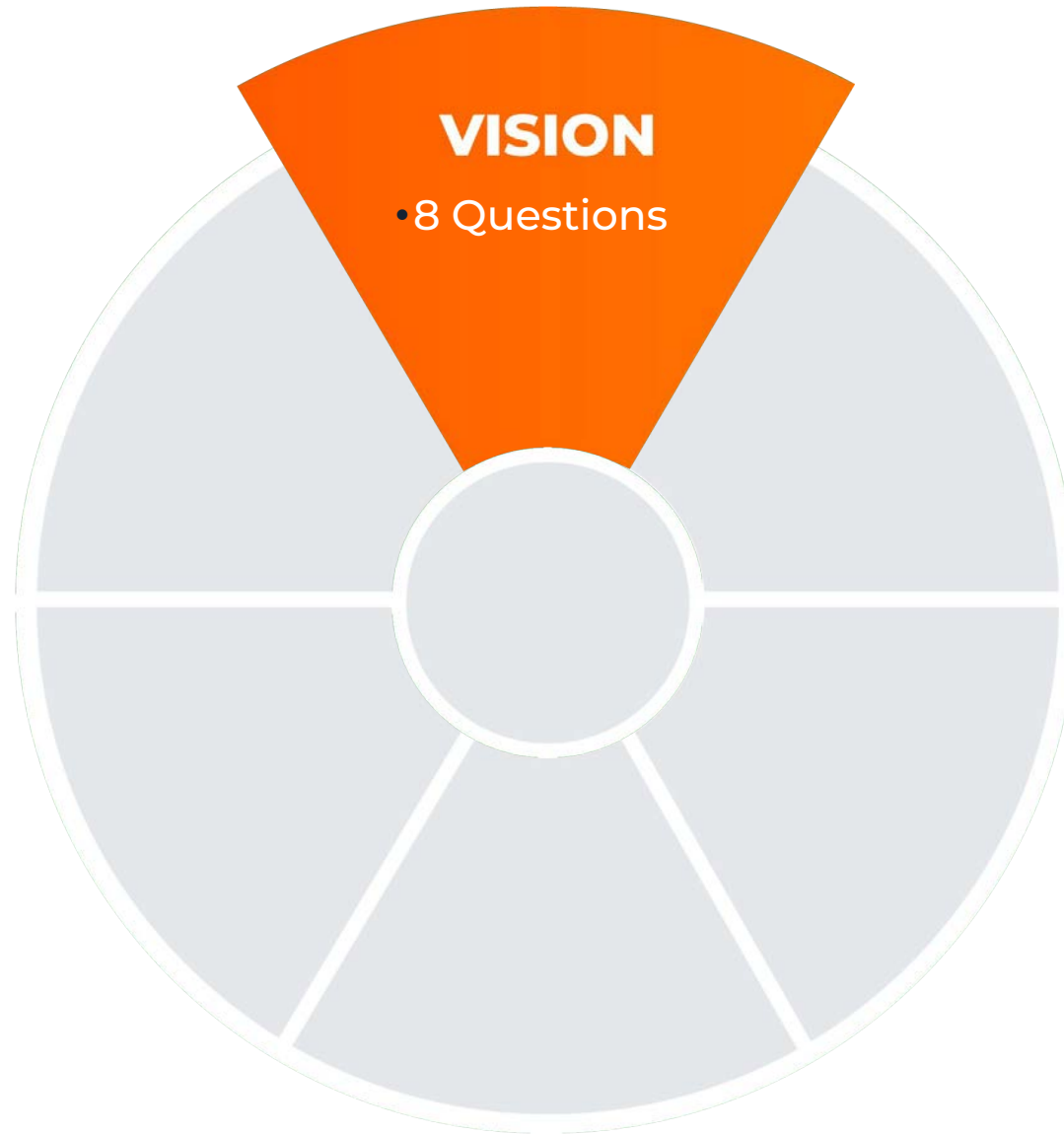
THE EOS MODEL



100%

Most ►
20%
0%

THE EOS MODEL



THE VISION/TRACTION ORGANIZER™



THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME: _____

VISION

CORE VALUES	1. 2. 3. 4. 5.	3-YEAR PICTURE™ Future Date: Revenue: Profit: Measurables: What Does It Look Like? • • • • • • • • • •
CORE FOCUS™	Purpose/Cause/Passion: Our Niche:	
10-YEAR TARGET™	_____ _____ _____	
MARKETING STRATEGY	Target Market/"The List": Three Uniques™: 1. 2. 3. Proven Process: Guarantee:	

THE EOS MODEL®



THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME: _____

TRACTION

1-YEAR PLAN	ROCKS	ISSUES LIST																
<p>Future date:</p> <p>Revenue:</p> <p>Profit:</p> <p>Measurables:</p> <p>Goals for the Year</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p> <p>6. _____</p> <p>7. _____</p>	<p>Future date:</p> <p>Revenue:</p> <p>Profit:</p> <p>Measurables:</p> <table><thead><tr><th>Rocks for the Quarter</th><th>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>	Rocks for the Quarter	Who	1. _____	_____	2. _____	_____	3. _____	_____	4. _____	_____	5. _____	_____	6. _____	_____	7. _____	_____	<p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p> <p>6. _____</p> <p>7. _____</p> <p>8. _____</p> <p>9. _____</p> <p>10. _____</p> <p>Prioritize</p> <ul style="list-style-type: none">• Identify• Discuss• Solve
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	1. 2.	3-YEAR PICTURE™
CORE VALUES	1. 2. 3. 4. 5.	
10-YEAR PICTURE™	_____ _____ _____	• • • • • • • • • •
MARKETING STRATEGY	Target Market/"The List":	
	Three Uniques™: 1. 2. 3.	
	Proven Process:	
	Guarantee:	

- Discover
- Define
- Live and Breathe

	1.	3-YEAR PICTURE™
CORE FOCUS™	Purpose/Cause/Passion:	
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10-YEAR TARGET™	<hr/> <hr/>	<ul style="list-style-type: none">••••••
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CORE VALUES	1. 2. 3.	3-YEAR PICTURE™
10-YEAR TARGET™	<hr/> <hr/>	
	CORE FOCUS™	Our Niche:
10-YEAR TARGET		What Does It Look Like? <ul style="list-style-type: none"> • • • • • • • •
MARKETING STRATEGY	Target Market/"The List":	
	Three Uniques™: <ol style="list-style-type: none"> 1. 2. 3. Proven Process: Guarantee:	

- What do you want from your business?
- 5-30 years out
- #1 Goal

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

Future Date:

Revenue:

Profit:

Measurables:

What Does It Look Like?

-
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-

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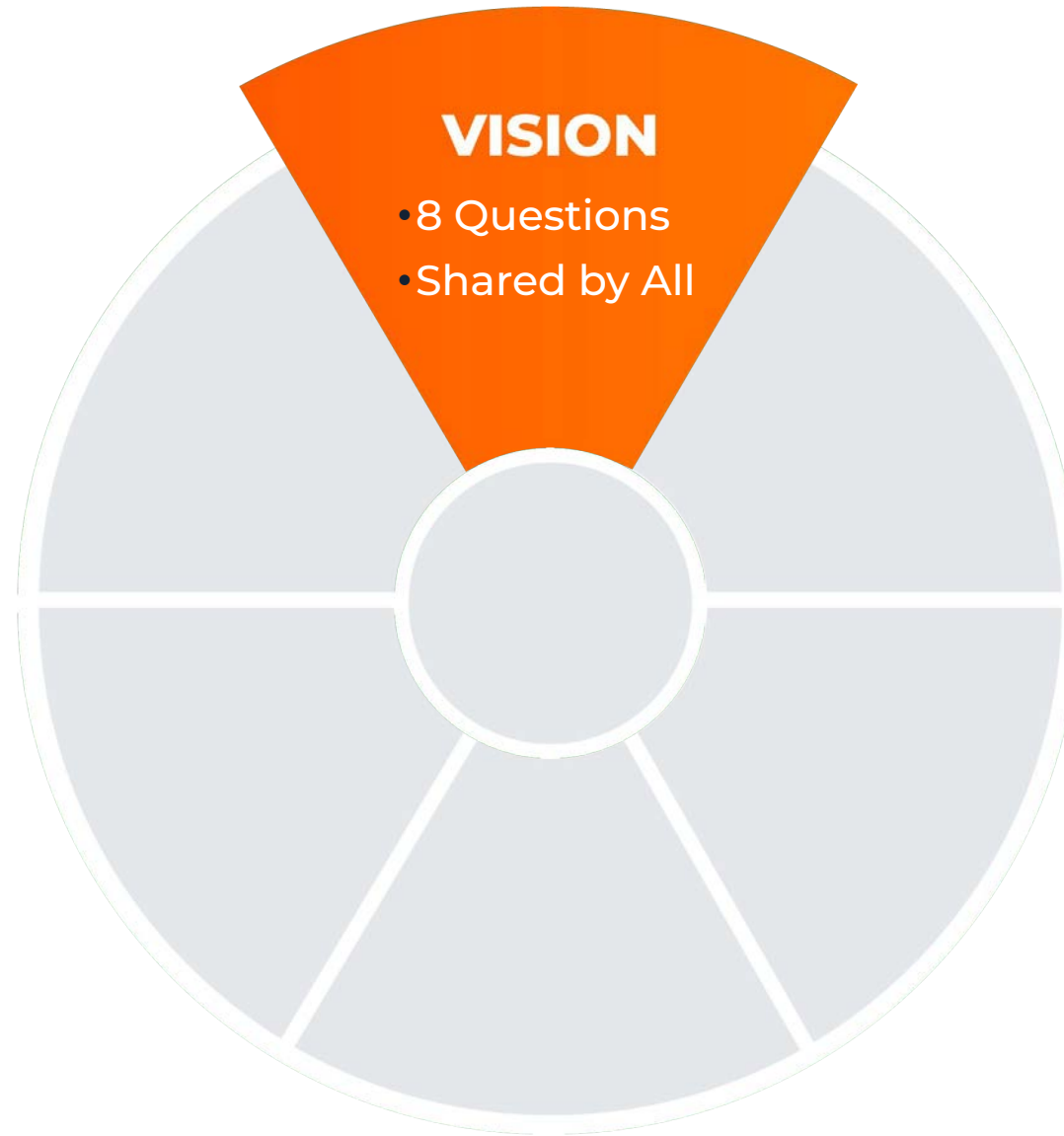
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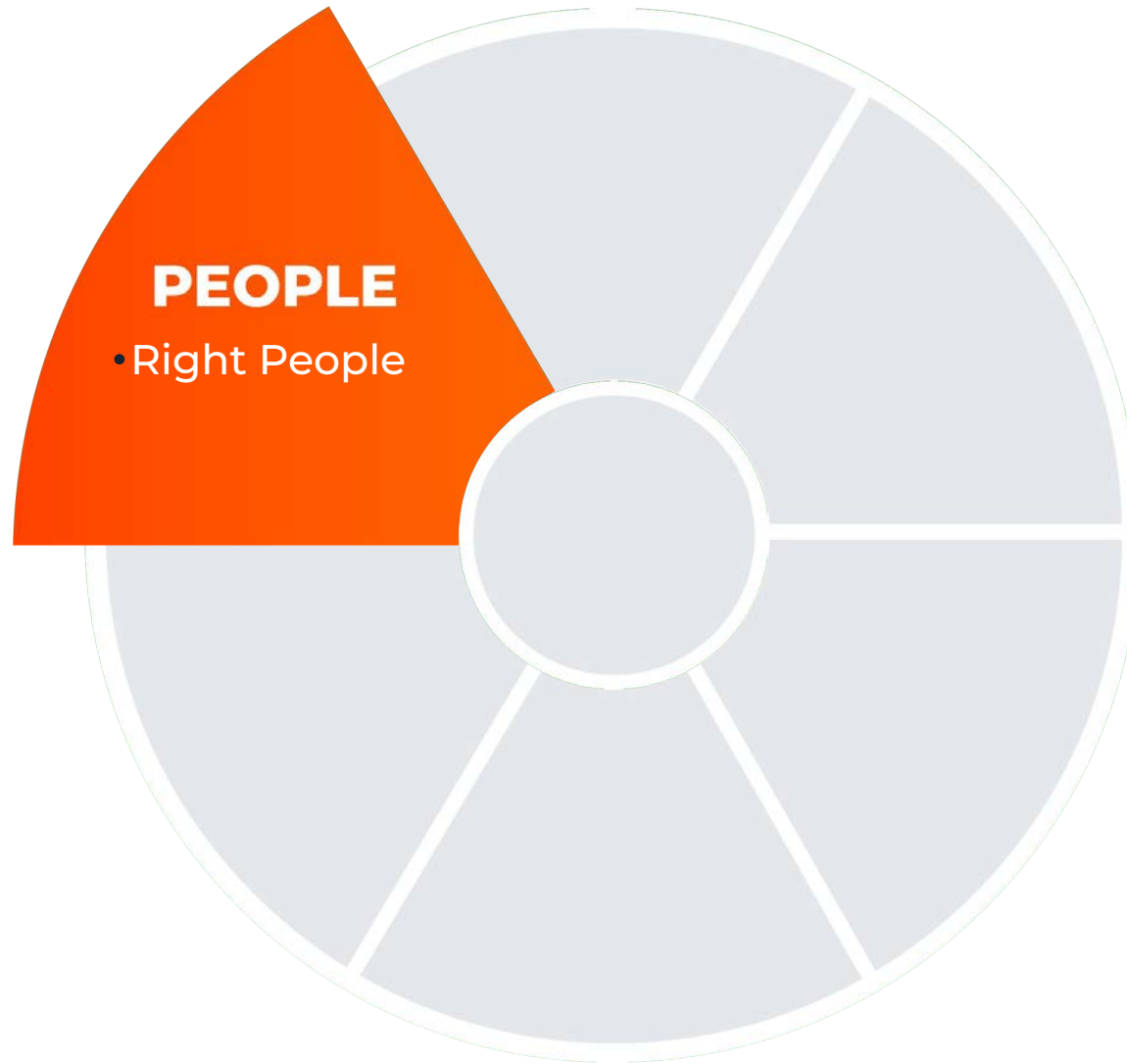
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THE EOS MODEL

100% Strong



THE EOS MODEL

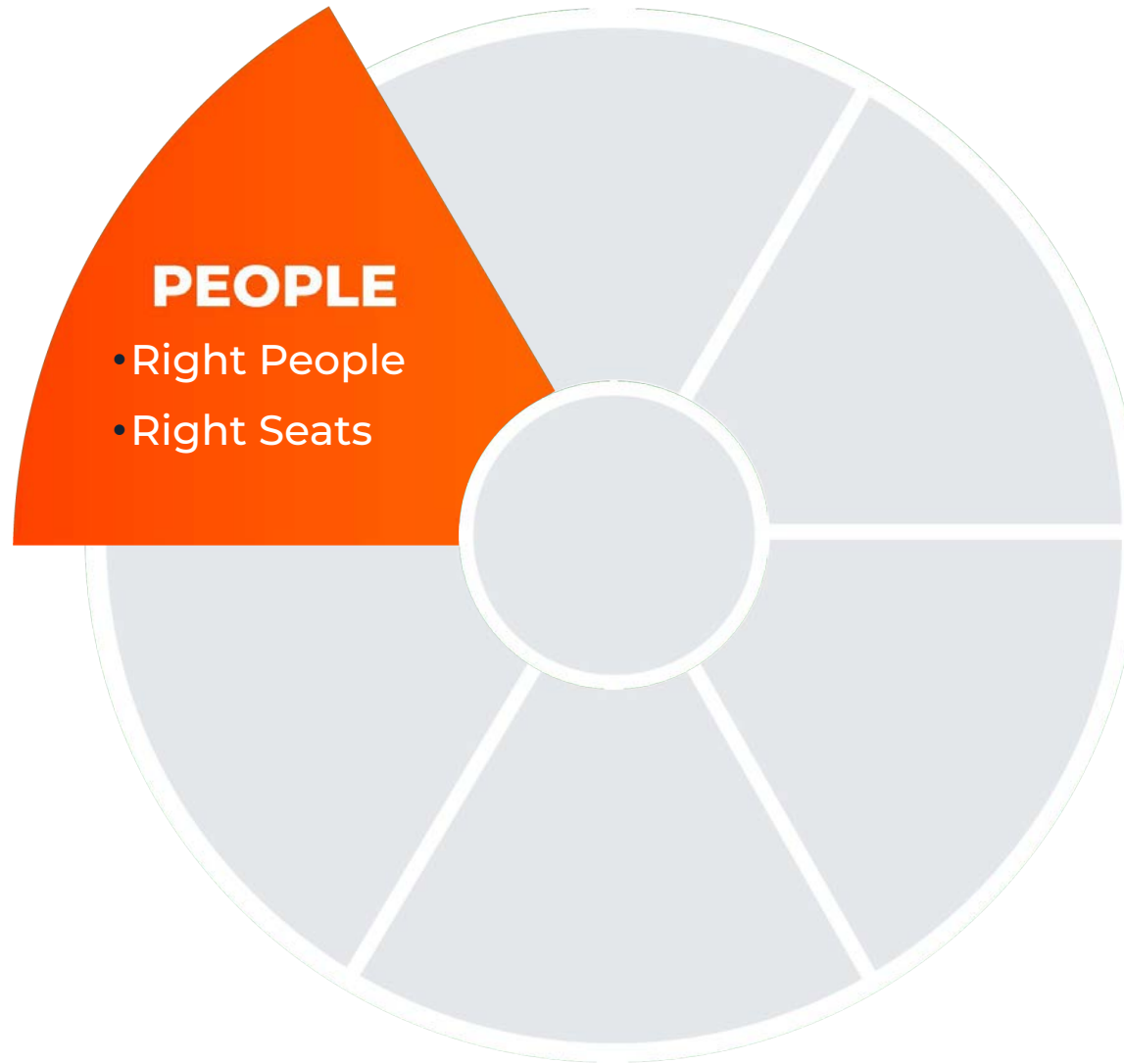


THE PEOPLE ANALYZER™

NAME	Adventurous Spirt	Grow or Die	Help First	Fun Loving	Do what you say					
Maria Rodriguez	+	+	+	+	+					
John Smith	-	+/-	-	-	+/-					
George Wilson	+/-	+/-	+	+/-	+					

THE BAR										
RATING + +/- -	+	+/-	+	+/-	+					

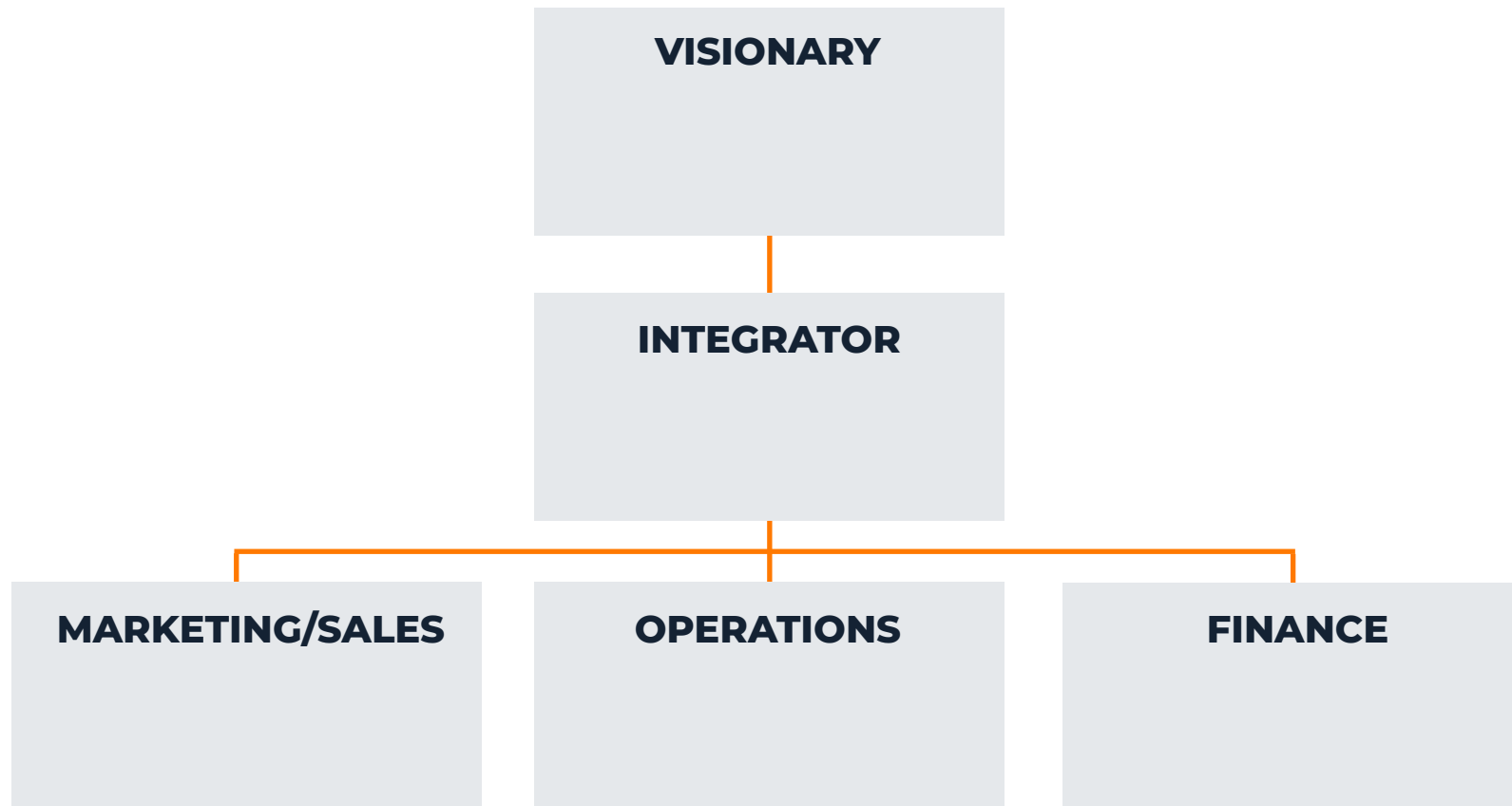
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“Structure first,
people second.”

–GINO WICKMAN

ACCOUNTABILITY CHART™



RIGHT SEATS

FUNCTION Name

- Role
- Role
- Role
- Role
- Role

RIGHT SEATS

Marketing/Sales Name

- LMA™
- Generate leads & interest
- Achieve Sales Metrics
- Own the Marketing/Sales Process
- Own the client relationship

RIGHT SEATS

- Gets It
- Wants It
- Capacity to Do It

THE PEOPLE ANALYZER™

NAME	Humbly confident	Grow or Die	Help First	Do the right thing	Do what you say			GETS IT	WANTS IT	CAPACITY
Maria Rodriguez	+	+	+	+	+			Y	Y	Y
John Smith	-	+/-	-	-	+/-			Y	Y	N
George Wilson	+/-	+/-	+	+/-	+			N	Y	Y

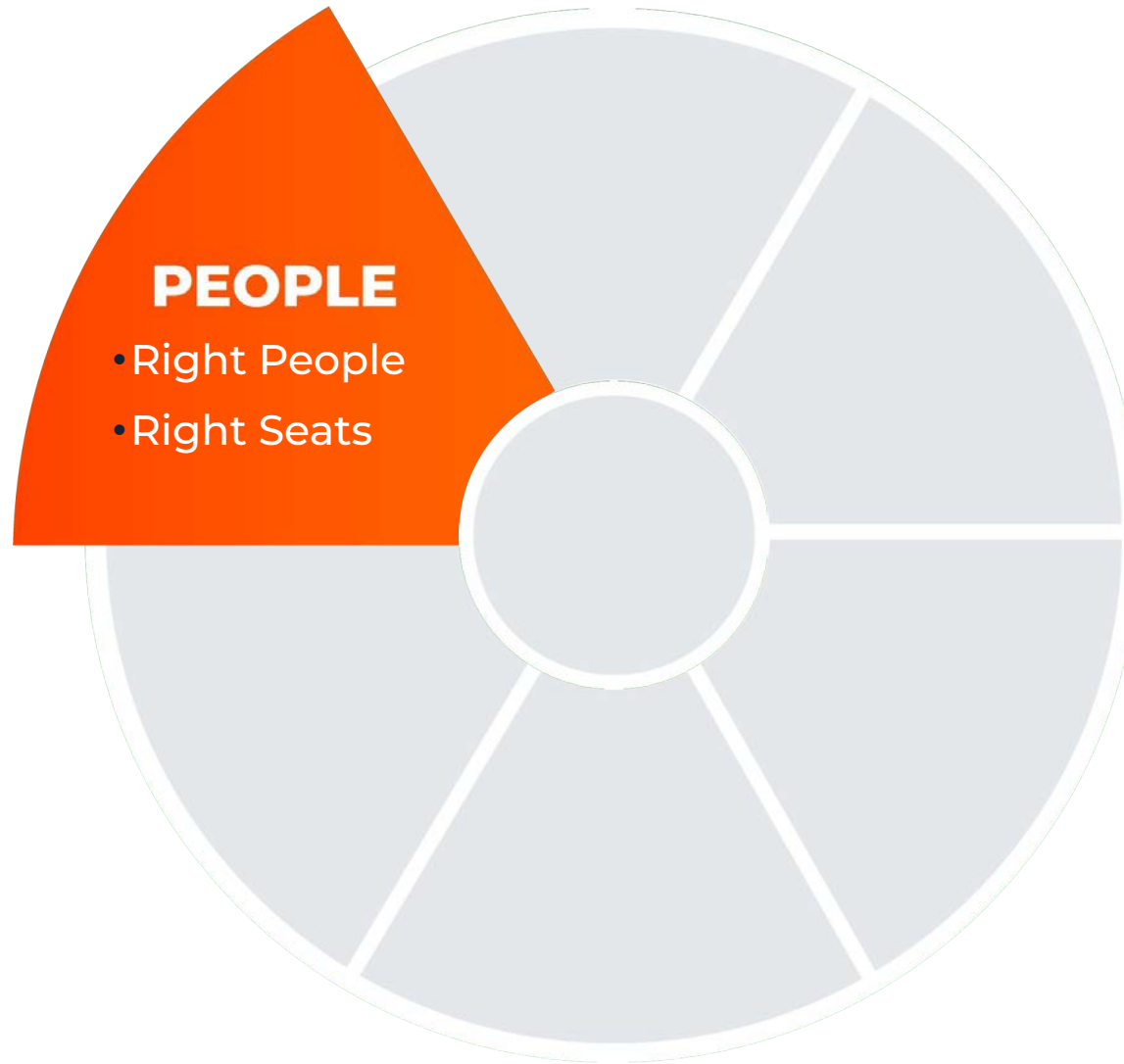
THE BAR										
RATING + +/- -	+	+/-	+	+/-	+					

TWO KINDS OF PEOPLE ISSUES

- Right Person, Wrong Seat
- Wrong Person, Right Seat

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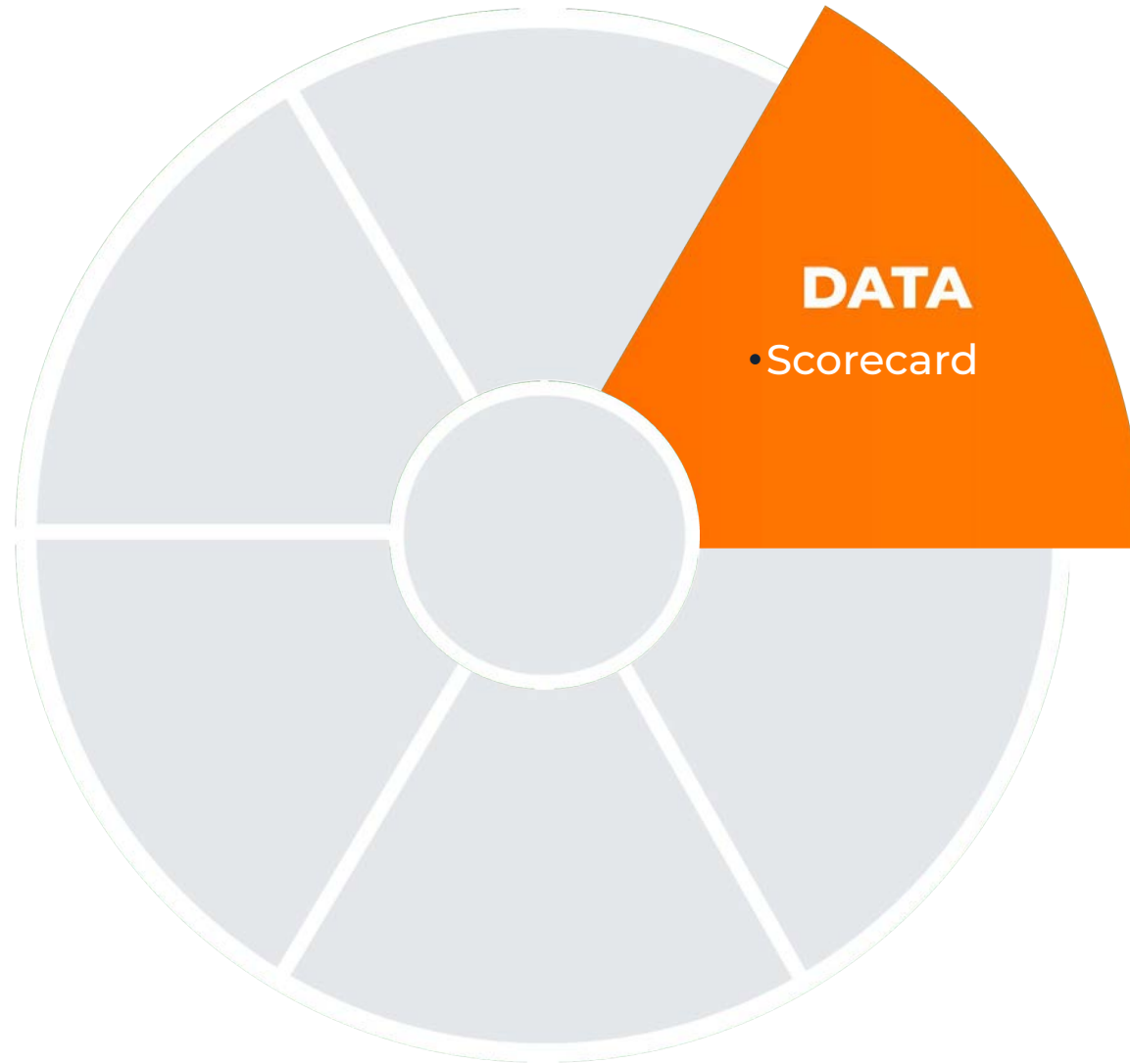
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“If we have data, let’s look at the data. If all we have are opinions, let’s go with mine.”

–**JIM BARKSDALE**, *former Netscape CEO*

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COMPANY SCORECARD

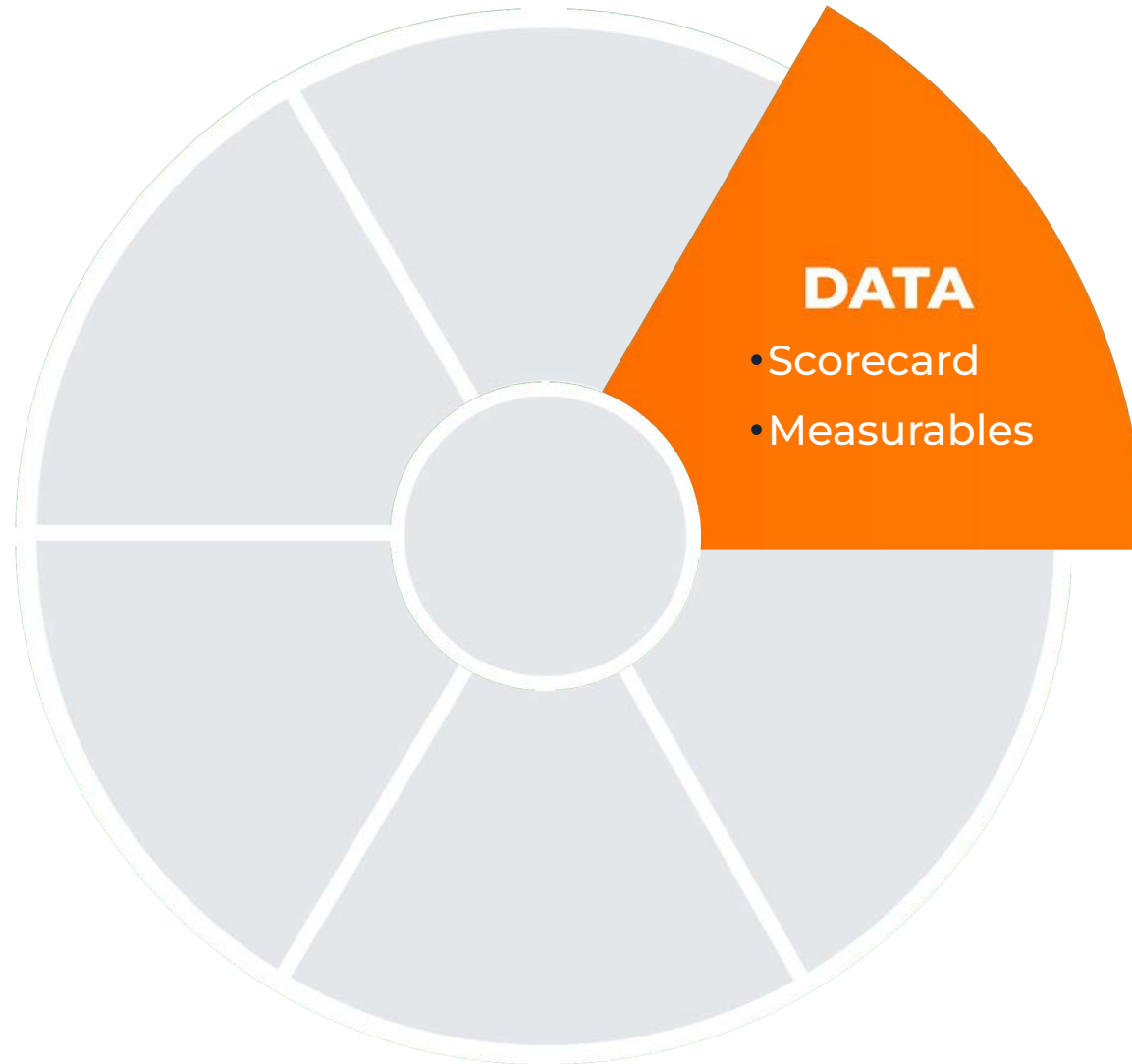
WHO	MEASURABLES	GOAL	30-Sep	7-Oct	14-Oct	21-Oct	28-Oct	4-Nov	11-Nov	18-Nov	25-Nov	2-Dec	9-Dec	16-Dec	23-Dec
Anne	New Inquires	50	40	48	52	54	57	55	61	48	45	47	42	55	58
Anne	Confirmed Bookings	>= 20	19	20	22	23	25	25	27	19	17	20	15	19	23
Robert	Next Weeks Capacity	>90%	91%	94%	89%	89%	90%	90%	91%	92%	85%	84%	88%	90%	92%
Robert	Open Positions	<=5	10	8	7	7	7	6	6	5	5	5	4	6	5
Robert	Customer No Shows	<=2	1	4	1	0	0	2	0	4	1	2	1	0	5
Robert	Staff No Shows	0	2	3	6	0	0	1	5	3	0	1	0	0	1
David	Customer Satisfaction	>=80%	80%	84%	71%	81%	80%	81%	70%	84%	83%	90%	80%	82%	80%
Claire	Accounts Payable	<\$8,000	\$8,450	\$9,234	\$3,450	\$5,500	\$4,300	\$8,900	\$2,300	\$5,409	\$4,390	\$9,032	\$3,445	\$2,300	\$5,009
David	Cash Balance	>=75K	\$71K	\$70K	\$78K	\$78K	\$77K	\$75K	\$73K	\$75K	\$77K	\$70K	\$68K	\$75K	\$78K
John	Equipment Utilization	>75%	75%	76%	73%	75%	75%	75%	75%	82%	75%	73%	74%	75%	75%

SCORECARD MEASURABLES

- New Inquiries
- Confirmed Bookings
- Web Conversions
- Next Week's Capacity
- Open Positions
- Equipment Utilization
- Staff No Shows
- Customer Rating
- Weekly Revenue
- Accounts Receivables
- Accounts Payables
- Cash Balance

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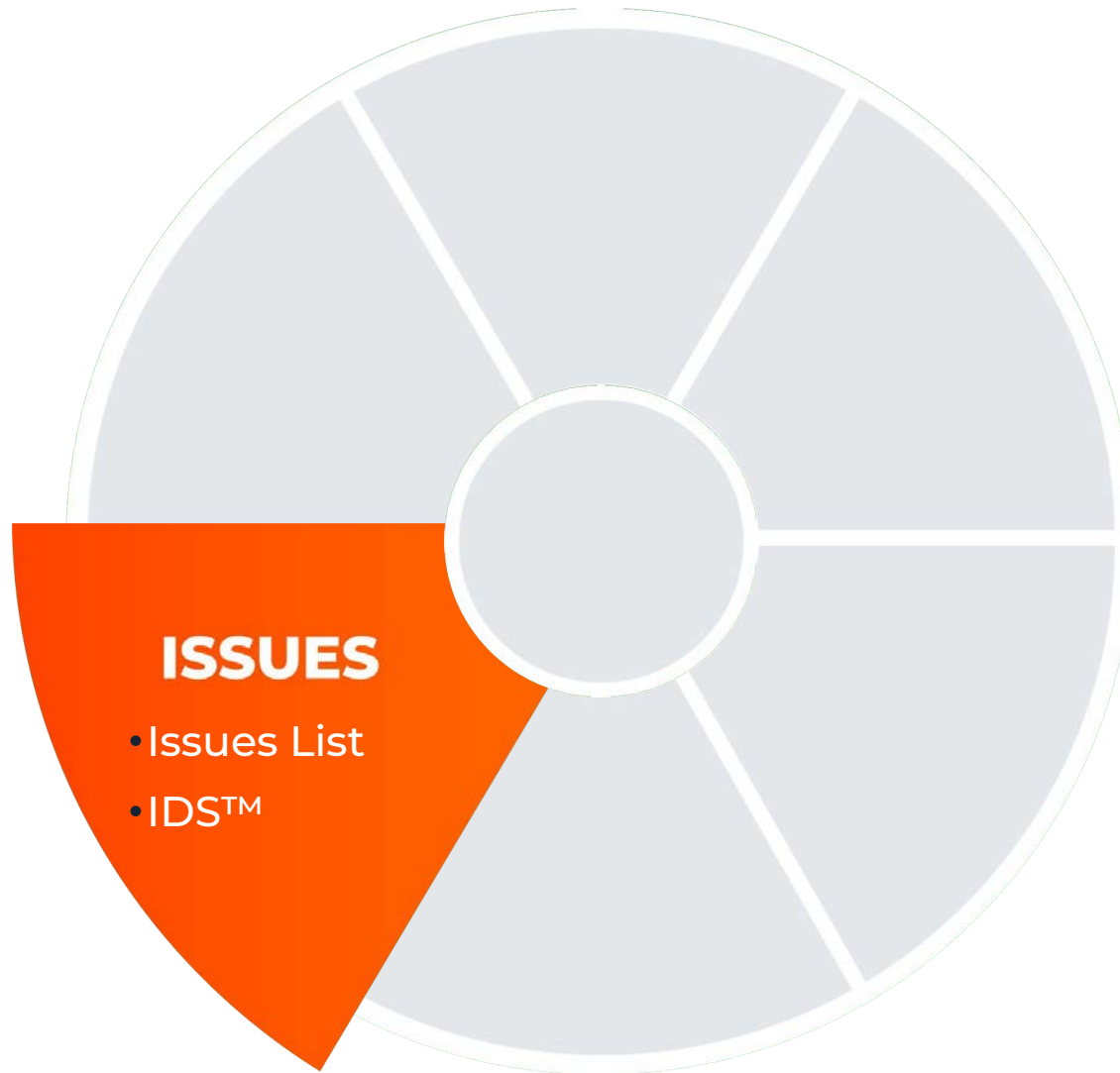
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ISSUES SOLVING TRACK

• Identify

• Discuss

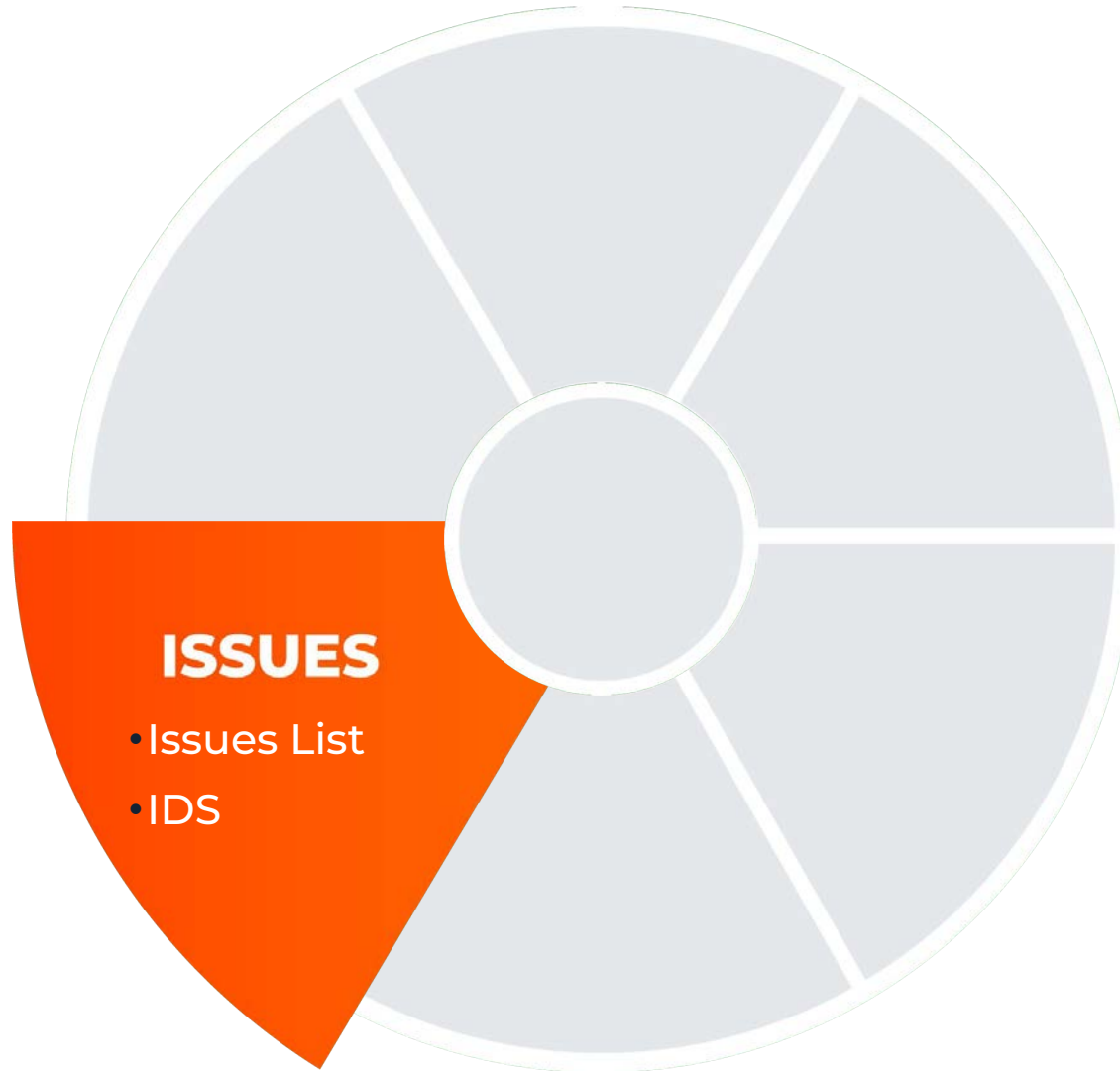
• Solve

ISSUES LIST

1. Website Rock off-track **2**
2. Darren U. Right Person
3. Andi S. Right Seat **1**
4. ~~Spring Bookings off-track~~
5. Rent or lease **3**
6. Equipment Utilization off-track
7. Western River expansion
- 8.
- 9.
- 10.

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HANDFUL OF CORE PROCESSES

- People
- Marketing
- Sales
- Operations 1
- Operations 2
- Customer Service
- Accounting

DOCUMENT AND SIMPLIFY

Table of Contents

- People
- Marketing
- Sales
- Operations
- Operations
- Accounting
- Customer Service

DOCUMENT AND SIMPLIFY

- **People**

- ID Need
- Define
- Hiring
- On-Boa
- Training
- LMA
- Termina

- **Sales Process**

- New Lead _____
- Initial Call/
Qualify _____
- Fit Meeting _____
- Proposal _____
- Win/Lose _____

“YOUR COMPANY WAY”

Table of Contents

- People
- Marketing
- Sales
- Operations 1
- Operations 2
- Accounting
- Customer Service

People Process

- ID Need _____
- Define Seat _____

- Hiring _____

- On-Boarding/
Training _____

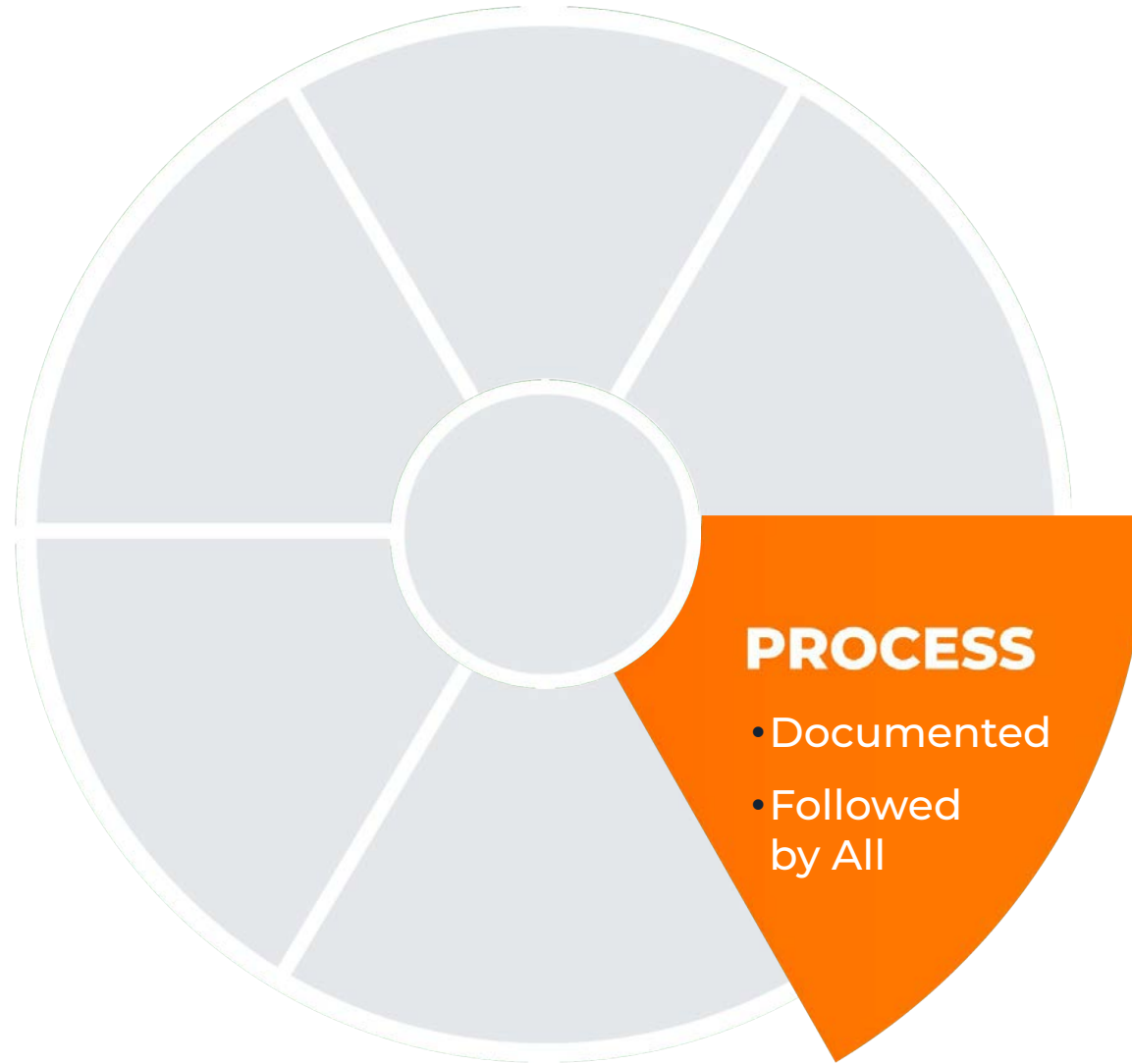
- LMA _____

- Termination _____

“Systemize the predictable
so you can humanize
the exceptional.”

– **ISADORE SHARP**, *founder of Four Seasons Hotels*

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FBA CHECKLIST



Train



Measure



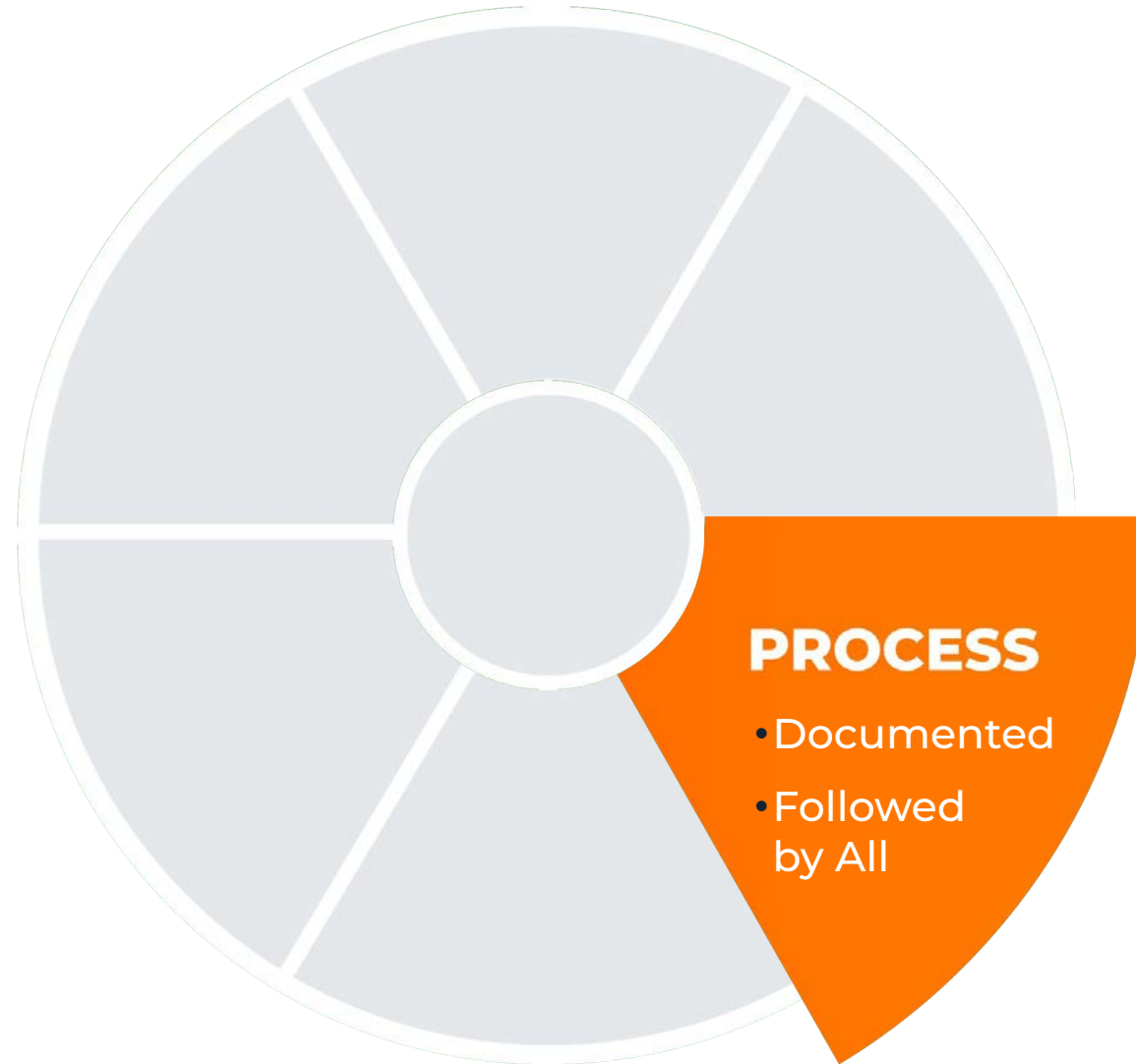
LMA



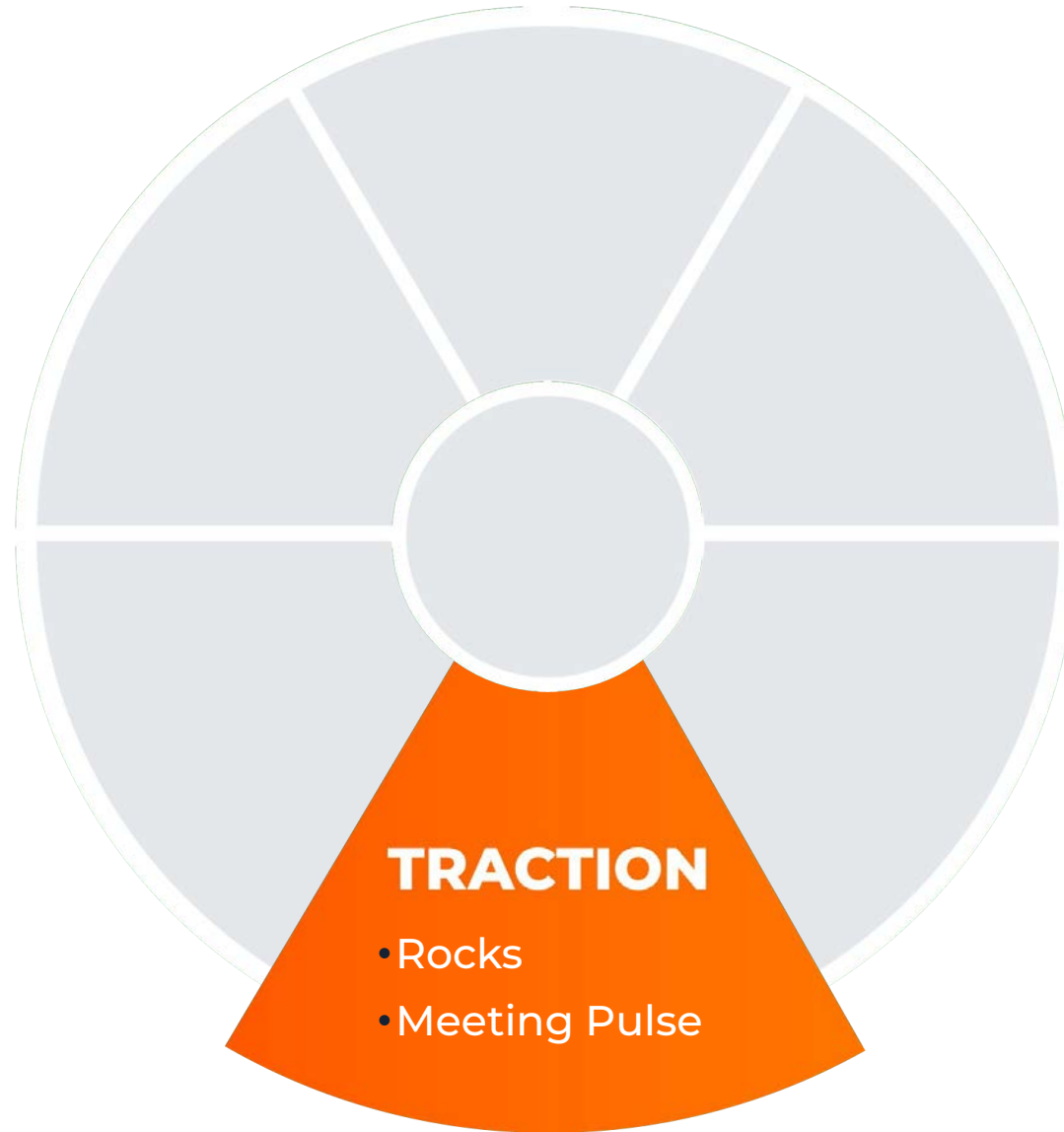
Update

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MEETING PULSE™

- **90-Day World™**
- **Meeting Pulse**
 - Same Day
 - Same Time
 - Start on Time
 - End on Time
 - Same Agenda

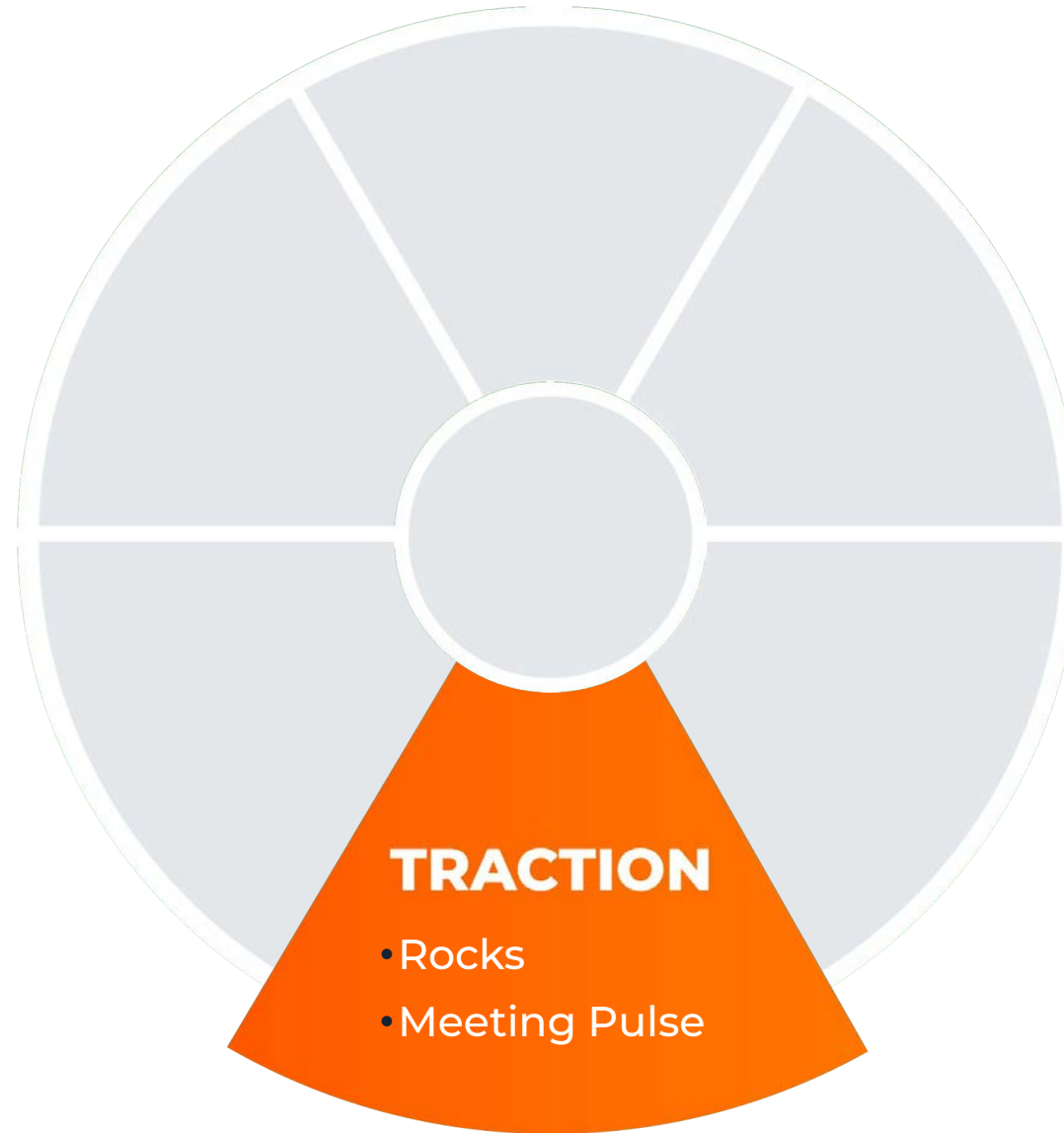
LEVEL 10 MEETING™

- **Good News** 5 Minutes
- **Scorecard** 5 Minutes
- **Rock Review** 5 Minutes
- **Customer & Employee Headlines** 5 Minutes
- **To Do List** 5 Minutes
- **Issues List/ID** 5 Minutes
- **Conclude** 5 Minutes

Reporting Only

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GET
RESULTS

THE EOS MODEL





EOS FOUNDATIONAL TOOLS™

- **V/TO**
- **Accountability Chart**
- **Rocks**
- **Meeting Pulse**
- **Scorecard**



RESOURCES

- **Scan here for Electronic Copies**
- **Reach out to me with questions**
- **Request a 90 minute deep dive**
with your leadership team
- **EOSWorldwide.com**
 - Traction Library
 - Downloadable tools and videos
 - Base Camp

FINAL THOUGHTS

- Choose — and Use — a System
- Get What You Want
- Growing your business should be fun!

Thank you!

Lorie Clements

Expert EOS Implementer

832.316.2402

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www.thespringboardsolution.com

