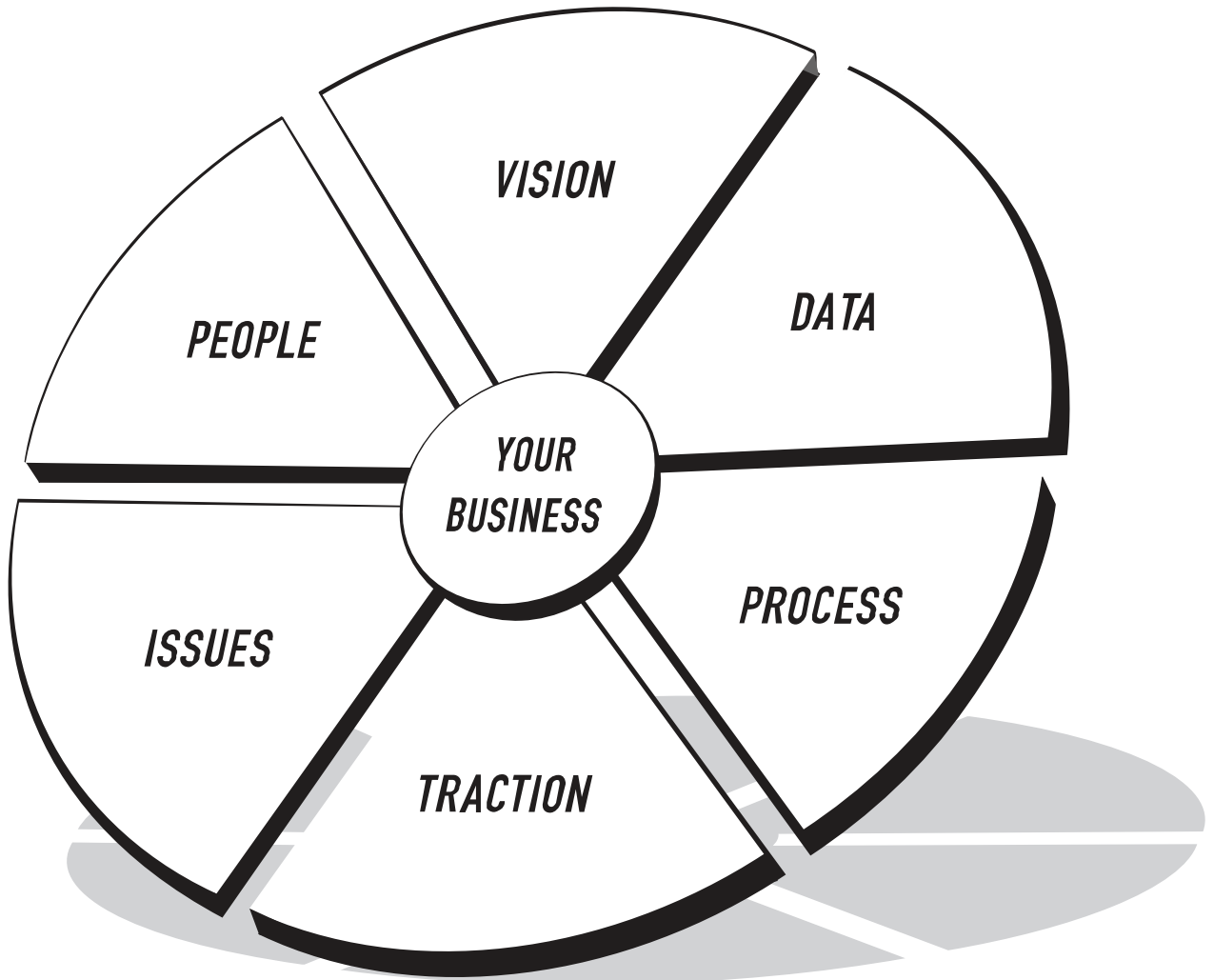
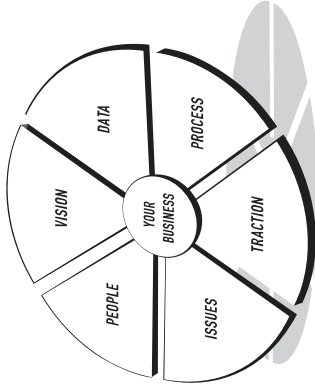






# THE EOS MODEL™



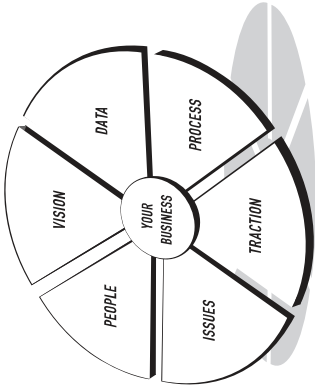


# THE VISION/TRACTION ORGANIZER™

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

## VISION

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



# 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 style="width: 20px; text-align: center;">1.</td><td style="height: 20px;"></td></tr> <tr><td style="text-align: center;">2.</td><td style="height: 20px;"></td></tr> <tr><td style="text-align: center;">3.</td><td style="height: 20px;"></td></tr> <tr><td style="text-align: center;">4.</td><td style="height: 20px;"></td></tr> <tr><td style="text-align: center;">5.</td><td style="height: 20px;"></td></tr> <tr><td style="text-align: center;">6.</td><td style="height: 20px;"></td></tr> <tr><td style="text-align: center;">7.</td><td style="height: 20px;"></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;"> <tr><td style="width: 20px; text-align: center;">1.</td><td style="width: 50%; height: 20px;"></td><td style="width: 20%; text-align: center;">Who</td></tr> <tr><td style="text-align: center;">2.</td><td style="height: 20px;"></td><td></td></tr> <tr><td style="text-align: center;">3.</td><td style="height: 20px;"></td><td></td></tr> <tr><td style="text-align: center;">4.</td><td style="height: 20px;"></td><td></td></tr> <tr><td style="text-align: center;">5.</td><td style="height: 20px;"></td><td></td></tr> <tr><td style="text-align: center;">6.</td><td style="height: 20px;"></td><td></td></tr> <tr><td style="text-align: center;">7.</td><td style="height: 20px;"></td><td></td></tr> </table>	1.		Who	2.			3.			4.			5.			6.			7.			<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20px; text-align: center;">1.</td><td style="width: 80%; height: 20px;"></td></tr> <tr><td style="text-align: center;">2.</td><td style="height: 20px;"></td></tr> <tr><td style="text-align: center;">3.</td><td style="height: 20px;"></td></tr> <tr><td style="text-align: center;">4.</td><td style="height: 20px;"></td></tr> <tr><td style="text-align: center;">5.</td><td style="height: 20px;"></td></tr> <tr><td style="text-align: center;">6.</td><td style="height: 20px;"></td></tr> <tr><td style="text-align: center;">7.</td><td style="height: 20px;"></td></tr> <tr><td style="text-align: center;">8.</td><td style="height: 20px;"></td></tr> <tr><td style="text-align: center;">9.</td><td style="height: 20px;"></td></tr> <tr><td style="text-align: center;">10.</td><td style="height: 20px;"></td></tr> </table> <p style="text-align: right; margin-top: 20px;">                     Prioritize                      • Identify                      • Discuss                      • Solve                 </p>	1.		2.		3.		4.		5.		6.		7.		8.		9.		10.	
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# 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™

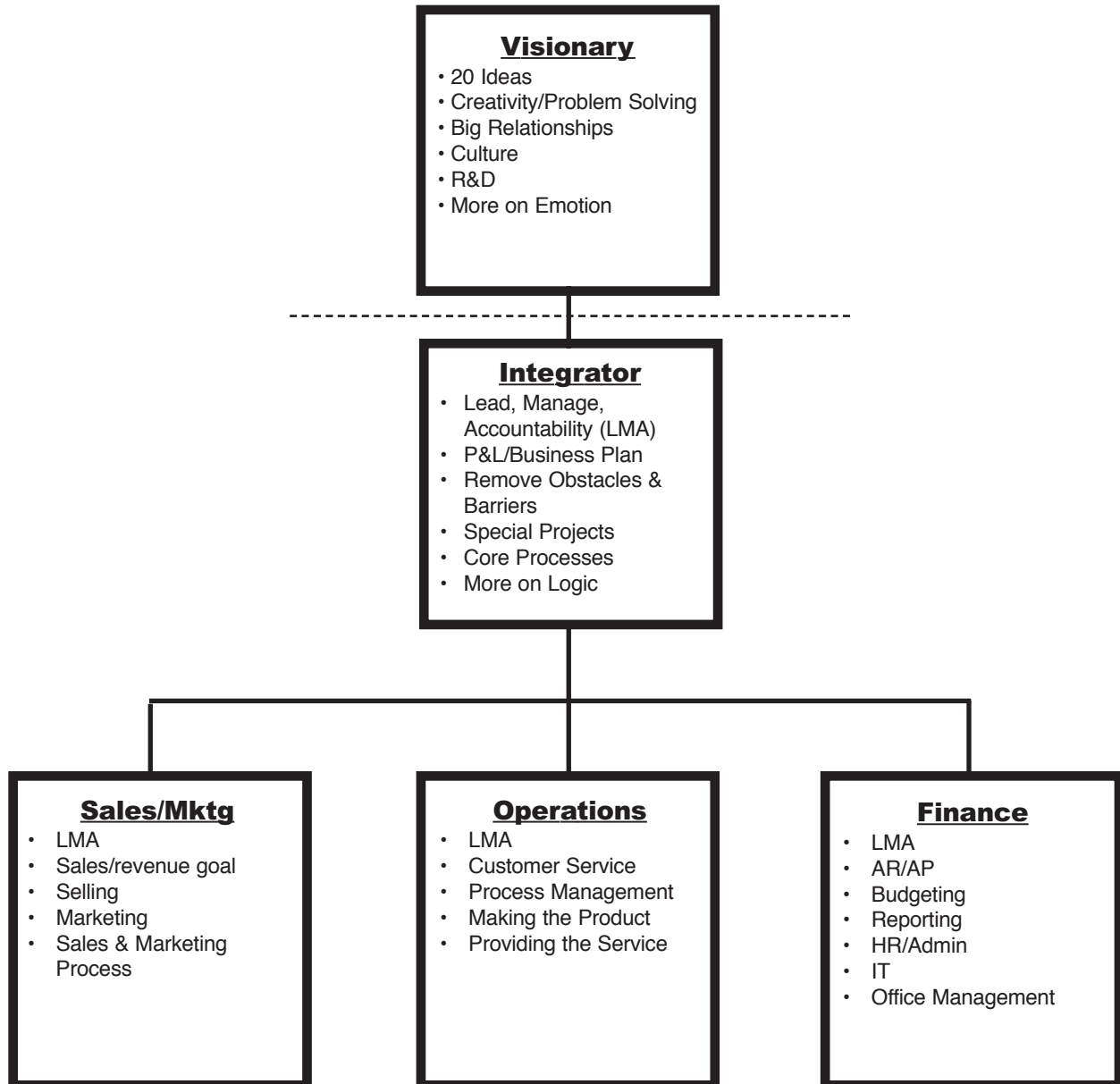
**NAME**

<b>The Bar</b>									

**Rating:** + +/- -



# THE ACCOUNTABILITY CHART





## 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:**

#### **Get it?**

Y      N  
   

- 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.



# 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.

# CORE PROCESSES

- **People Process**
- **Marketing Process**
- **Sales Process**
- **Operations Processes**
- **Accounting Process**
- **Customer–Retention Process**

# THE LEVEL 10 MEETING™

## The Weekly Agenda

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

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

### Agenda:

Good News	5 Minutes
Scorecard	5 Minutes
Rock Review	5 Minutes
People Headlines	5 Minutes
To-Do List	5 Minutes
<i>adadddxcfcvrtddffhghkoo mhwngg dadadadaczwfider hfidv egefg daded dadd ffvcccfufjmmmm mhw</i>	
IDS (Issues list)	60 Minutes
<i>adadddxcfcvrtddffhghkoo mhwngg dadadadaczwfider hfidv egefg daded dadd ffvcccfufjmmmm mhw</i>	
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](http://www.eosworldwide.com) to get everything you need to fully implement EOS in your company today.



# 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>		

# NOTES

# NOTES