



GET A GRIP ON YOUR BUSINESS

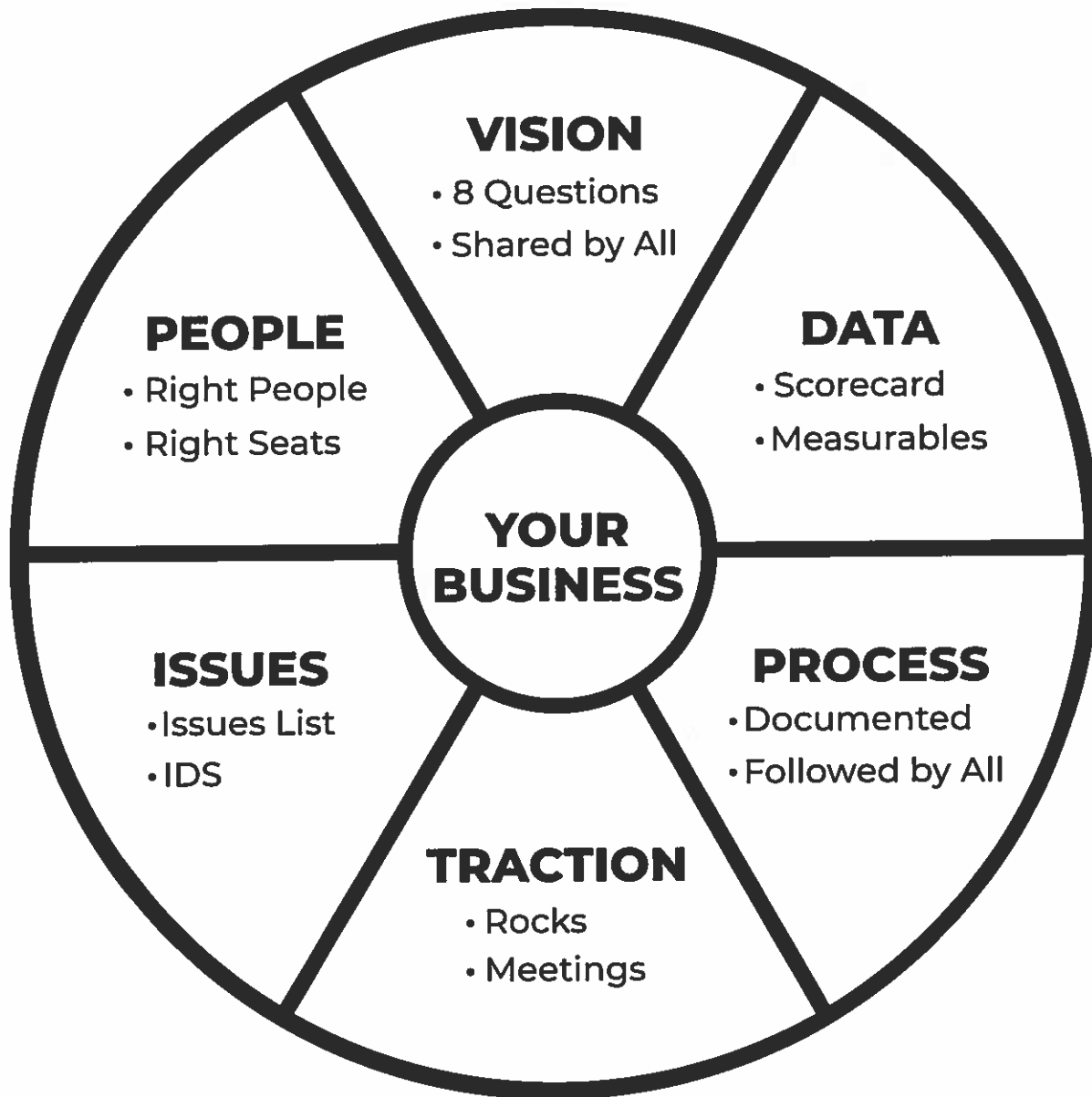
**Six Keys to Getting What You want
from your Entrepreneurial
Company**

eosworldwide.com

Helping organizations clarify, simplify,
and achieve their vision

NOTES

THE EOS MODEL[®]





THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME: _____

VISION _____

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



THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME: _____

TRACTION _____

1-YEAR PLAN	ROCKS	ISSUES LIST
Future date: Revenue: Profit: Measurables: Goals for the Year 1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____ 7. _____	Future date: Revenue: Profit: Measurables: Rocks for the Quarter 1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____ 7. _____ Who _____ _____ _____ _____ _____ _____ _____	1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____ 7. _____ 8. _____ 9. _____ 10. _____ Prioritize • Identify • Discuss • Solve

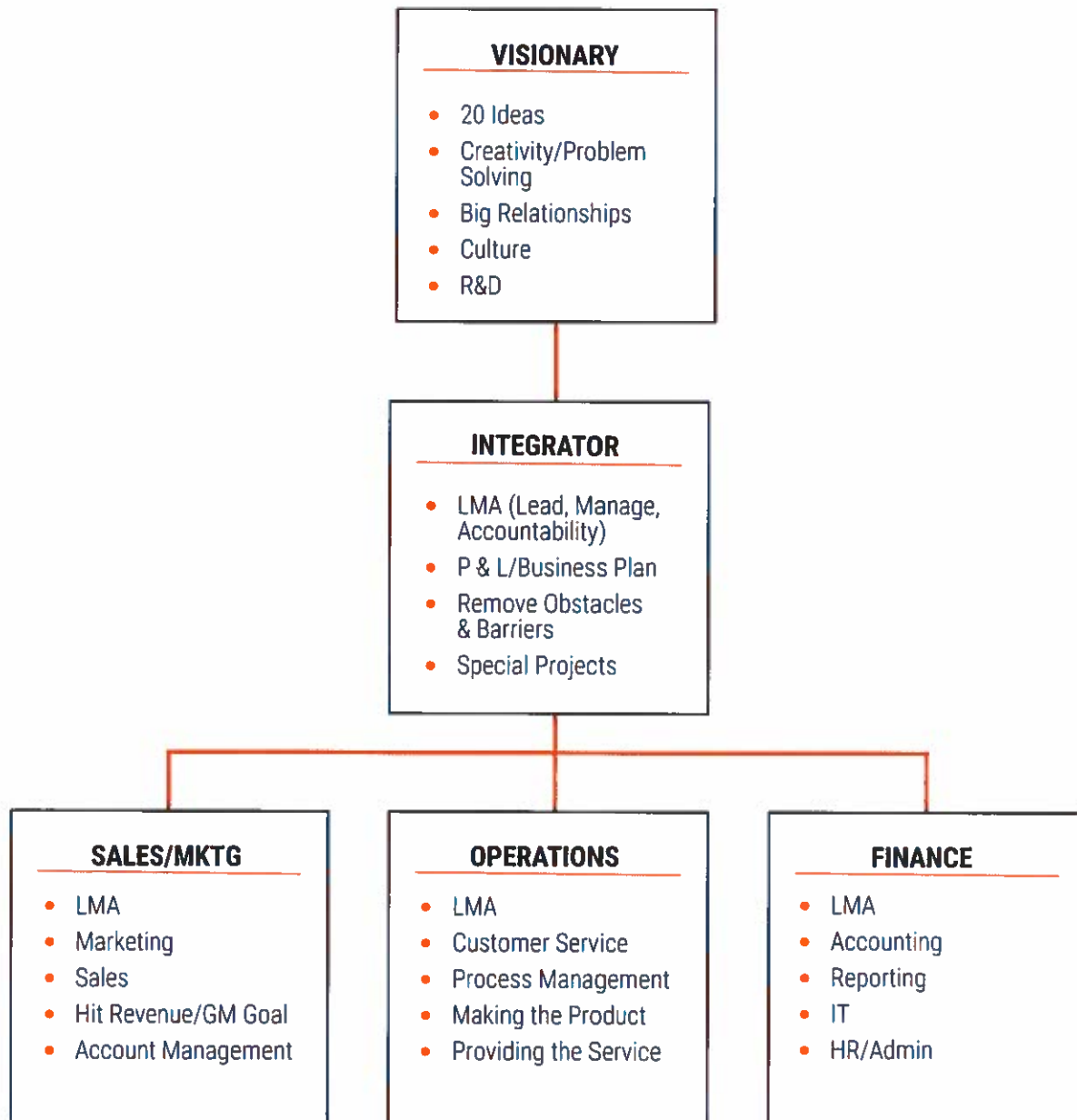
EXAMPLES OF CORE VALUES

- Unequivocal excellence
- Continually strive for perfection
- Wins
- Does the right thing
- Compassion
- Shows honesty and integrity
- Hungry for achievement
- Enthusiastic
- Encourages individual ability and creativity
- Maintains accountability
- Customer 1st
- Works hard
- Is never satisfied
- Is interested in continuous self-improvement
- Help first
- Exhibit professionalism
- Encourage individual initiative
- Growth-oriented
- Treats everyone with respect
- No entitlement
- Has creativity, dreams, and imagination
- No cynicism
- Humbly Confident
- Fanatical attention to consistency and detail
- Committed
- Understand the value of reputation
- Fun
- Fair
- Encourage teamwork
- No Eeyores
- No Drama
- Expect excellence
- Tenacious
- Keep it real
- Genuine
- Authentic

100

NAME**RATING: + +/- -****RATING: + +/- -**

THE ACCOUNTABILITY CHART™



100

NOTES

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.

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.

FUNCTION NAME	
•	_____
•	_____
•	_____
•	_____
•	_____

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.

NOTES

1998, 1999, 2000, 2001, 2002, 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024, 2025, 2026, 2027, 2028, 2029, 2030, 2031, 2032, 2033, 2034, 2035, 2036, 2037, 2038, 2039, 2040, 2041, 2042, 2043, 2044, 2045, 2046, 2047, 2048, 2049, 2050, 2051, 2052, 2053, 2054, 2055, 2056, 2057, 2058, 2059, 2060, 2061, 2062, 2063, 2064, 2065, 2066, 2067, 2068, 2069, 2070, 2071, 2072, 2073, 2074, 2075, 2076, 2077, 2078, 2079, 2080, 2081, 2082, 2083, 2084, 2085, 2086, 2087, 2088, 2089, 2090, 2091, 2092, 2093, 2094, 2095, 2096, 2097, 2098, 2099, 2100, 2101, 2102, 2103, 2104, 2105, 2106, 2107, 2108, 2109, 2110, 2111, 2112, 2113, 2114, 2115, 2116, 2117, 2118, 2119, 2120, 2121, 2122, 2123, 2124, 2125, 2126, 2127, 2128, 2129, 2130, 2131, 2132, 2133, 2134, 2135, 2136, 2137, 2138, 2139, 2140, 2141, 2142, 2143, 2144, 2145, 2146, 2147, 2148, 2149, 2150, 2151, 2152, 2153, 2154, 2155, 2156, 2157, 2158, 2159, 2160, 2161, 2162, 2163, 2164, 2165, 2166, 2167, 2168, 2169, 2170, 2171, 2172, 2173, 2174, 2175, 2176, 2177, 2178, 2179, 2180, 2181, 2182, 2183, 2184, 2185, 2186, 2187, 2188, 2189, 2190, 2191, 2192, 2193, 2194, 2195, 2196, 2197, 2198, 2199, 2200, 2201, 2202, 2203, 2204, 2205, 2206, 2207, 2208, 2209, 2210, 2211, 2212, 2213, 2214, 2215, 2216, 2217, 2218, 2219, 2220, 2221, 2222, 2223, 2224, 2225, 2226, 2227, 2228, 2229, 2230, 2231, 2232, 2233, 2234, 2235, 2236, 2237, 2238, 2239, 2240, 2241, 2242, 2243, 2244, 2245, 2246, 2247, 2248, 2249, 2250, 2251, 2252, 2253, 2254, 2255, 2256, 2257, 2258, 2259, 2260, 2261, 2262, 2263, 2264, 2265, 2266, 2267, 2268, 2269, 2270, 2271, 2272, 2273, 2274, 2275, 2276, 2277, 2278, 2279, 2280, 2281, 2282, 2283, 2284, 2285, 2286, 2287, 2288, 2289, 2290, 2291, 2292, 2293, 2294, 2295, 2296, 2297, 2298, 2299, 2300, 2301, 2302, 2303, 2304, 2305, 2306, 2307, 2308, 2309, 2310, 2311, 2312, 2313, 2314, 2315, 2316, 2317, 2318, 2319, 2320, 2321, 2322, 2323, 2324, 2325, 2326, 2327, 2328, 2329, 2330, 2331, 2332, 2333, 2334, 2335, 2336, 2337, 2338, 2339, 2340, 2341, 2342, 2343, 2344, 2345, 2346, 2347, 2348, 2349, 2350, 2351, 2352, 2353, 2354, 2355, 2356, 2357, 2358, 2359, 2360, 2361, 2362, 2363, 2364, 2365, 2366, 2367, 2368, 2369, 2370, 2371, 2372, 2373, 2374, 2375, 2376, 2377, 2378, 2379, 2380, 2381, 2382, 2383, 2384, 2385, 2386, 2387, 2388, 2389, 2390, 2391, 2392, 2393, 2394, 2395, 2396, 2397, 2398, 2399, 2400, 2401, 2402, 2403, 2404, 2405, 2406, 2407, 2408, 2409, 2410, 2411, 2412, 2413, 2414, 2415, 2416, 2417, 2418, 2419, 2420, 2421, 2422, 2423, 2424, 2425, 2426, 2427, 2428, 2429, 2430, 2431, 2432, 2433, 2434, 2435, 2436, 2437, 2438, 2439, 2440, 2441, 2442, 2443, 2444, 2445, 2446, 2447, 2448, 2449, 2450, 2451, 2452, 2453, 2454, 2455, 2456, 2457, 2458, 2459, 2460, 2461, 2462, 2463, 2464, 2465, 2466, 2467, 2468, 2469, 2470, 2471, 2472, 2473, 2474, 2475, 2476, 2477, 2478, 2479, 2480, 2481, 2482, 2483, 2484, 2485, 2486, 2487, 2488, 2489, 2490, 2491, 2492, 2493, 2494, 2495, 2496, 2497, 2498, 2499, 2500, 2501, 2502, 2503, 2504, 2505, 2506, 2507, 2508, 2509, 2510, 2511, 2512, 2513, 2514, 2515, 2516, 2517, 2518, 2519, 2520, 2521, 2522, 2523, 2524, 2525, 2526, 2527, 2528, 2529, 2530, 2531, 2532, 2533, 2534, 2535, 2536, 2537, 2538, 2539, 2540, 2541, 2542, 2543, 2544, 2545, 2546, 2547, 2548, 2549, 2550, 2551, 2552, 2553, 2554, 2555, 2556, 2557, 2558, 2559, 2560, 2561, 2562, 2563, 2564, 2565, 2566, 2567, 2568, 2569, 2570, 2571, 2572, 2573, 2574, 2575, 2576, 2577, 2578, 2579, 2580, 2581, 2582, 2583, 2584, 2585, 2586, 2587, 2588, 2589, 2590, 2591, 2592, 2593, 2594, 2595, 2596, 2597, 2598, 2599, 2600, 2601, 2602, 2603, 2604, 2605, 2606, 2607, 2608, 2609, 2610, 2611, 2612, 2613, 2614, 2615, 2616, 2617, 2618, 2619, 2620, 2621, 2622, 2623, 2624, 2625, 2626, 2627, 2628, 2629, 2630, 2631, 2632, 2633, 2634, 2635, 2636, 2637, 2638, 2639, 2640, 2641, 2642, 2643, 2644, 2645, 2646, 2647, 2648, 2649, 2650, 2651, 2652, 2653, 2654, 2655, 2656, 2657, 2658, 2659, 2660, 2661, 2662, 2663, 2664, 2665, 2666, 2667, 2668, 2669, 2670, 2671, 2672, 2673, 2674, 2675, 2676, 2677, 2678, 2679, 26

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EXAMPLES OF 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™

Issues are problems, challenges, or obstacles, opportunities, and new ideas worth your attention. It's really anything—good or bad—that your team may need to resolve. With your **Issues List** complete and clear, start by prioritizing the one, two, and three most important Issues to tackle today. Then, follow this three-step **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

Being completely "open and honest," every member of the team shares his or her thoughts, ideas, concerns, and solutions regarding the *real issue*.

- Discuss and debate.
- Get it all on the table, but say it only once. Saying it more than once is politicking.
- When it's all on the table and things are getting redundant, it's time to solve.
- When the *real issue* is clear and you keep the greater good in mind, the solution is always simple. That doesn't mean easy, and sometimes it's very hard.

STEP 3: SOLVE

"Solve" means agreeing on a plan that will make the Issue go away forever. It's more important *that* you decide than *what* you decide... so decide!

- The solution must 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 clear, owned by someone, and put on the To-Do List (where they're confirmed as "To-Done" at next week's meeting).

On a healthy team, everyone will agree with the solution eight out of ten times. When they don't, 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 "disagree and commit" to support the decision. From there, there must be a united front moving forward.

-
- This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.

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>Additional agenda items may be added here</i>		
IDS	60	Minutes
<i>Additional agenda items may be added here</i>		
Conclude	5	Minutes
Recap To-Do List		
Cascading messages		
Rating (1-10)		

EOS FOUNDATIONAL TOOLS™

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

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