Every great system is made up of a core group of basic components. The same applies to a business. The Entrepreneurial Operating System (EOS) identifies Six Key Components of any organization. In the words of an EOS client, “I used to worry about 100 different things. Once I learned there were six components to my business and I focused on only those, those 100 different things I’d been worrying about went away. EOS made running the business simpler.”

You’re probably worrying needlessly about a hundred different things yourself. Let’s try to remove you from some of those worries by taking a wide-angle view of your business and its components. Below are the Six Key Components of any organization.

**VISION**
Successful business owners not only have compelling visions for their organizations, but also know how to communicate those visions to the people around them. They get everyone in the organization seeing the same clear image of where the business is going and how it’s going to get there. It sounds easy, but it’s not.

Are your staff all rowing in the same direction? Chances are they’re not. Some are rowing to the right, some are rowing to the left, and some probably aren’t rowing at all. If you met individually with each of your employees and asked them what the company’s vision was, you’d likely get a range of different answers.
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. We have a clear vision in writing that has been properly communicated and is shared by everyone.
2. Our core values are clear, and we are hiring, reviewing, rewarding, and firing around them.
3. Our core business is clear, and our systems and processes reflect that.
4. Our 10-year target is clear and has been communicated to everyone.
5. Our target market is clear, and our sales and marketing efforts are focused on it.
6. Our differentiators are clear, and all of our sales and marketing efforts communicate them.
7. We have a proven process for doing business with our customers. It has been named and visually illustrated, and everyone is adhering to it.
8. All of the people in our organization are the right people.
9. Our accountability chart (organizational chart of roles and responsibilities) is clear, complete, and constantly updated.
10. Everyone is in the right seat.
11. Our leadership team is open and honest, and demonstrates a high level of trust.

12. Everyone has Rocks and is focused on them (3 to 7 priorities per quarter).

13. Everyone is engaged in regular weekly meetings.

14. All meetings are on the same day and at the same time each week, have the same printed agenda, start on time, and end on time.

15. All teams clearly identify, discuss, and solve key issues for the greater good and long term.

16. Our systems and processes are documented, simplified, and followed by all.

17. We have a system for receiving regular customer and employee feedback, and we know their level of satisfaction.

18. A Scorecard for weekly metrics and measurables is in place.

19. Everyone in the organization has a number.

20. We have a budget and are monitoring it regularly (i.e., monthly or quarterly).

Total number of each ranking

Multiply by the number above $\times 1 \times 2 \times 3 \times 4 \times 5$

Add all five numbers to determine the percentage score that reflects the current state of your company: %.
SCORING RESULTS
If your score falls between:

20 and 34%  Please read on. This book will change your life.

35 and 49%  You are normal. But would you prefer normal or great?

50 and 64%  You are above average, but there is still room for improvement.

65 and 79%  You are well above average.

80 and 100% This is where most EOS clients end up. This is your goal.
### THE VISION/TRACTION ORGANIZER™

**ORGANIZATION NAME:**

#### VISION

<table>
<thead>
<tr>
<th></th>
<th>1.</th>
<th>2.</th>
<th>3.</th>
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<th>5.</th>
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<tbody>
<tr>
<td><strong>CORE VALUE</strong></td>
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<tr>
<td><strong>CORE FOCUS™</strong></td>
<td>Purpose/Cause/Passion:</td>
<td>Our Niche:</td>
<td></td>
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<tr>
<td><strong>10 YEAR TARGET</strong></td>
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<tr>
<td><strong>MARKETING STRATEGY</strong></td>
<td>Target Market/The List:</td>
<td>Three Uniques: 1. 2. 3.</td>
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<td>Proven Process:</td>
<td>Guarantee:</td>
<td></td>
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<tr>
<td><strong>3 YEAR PICTURE</strong></td>
<td>Future Date:</td>
<td>Revenue:</td>
<td>Profit:</td>
<td>Measurables:</td>
<td>What Does It Look Like?</td>
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</tbody>
</table>
# The Vision Component

## The Vision/Traction Organizer™

### Organization Name:

### Traction

<table>
<thead>
<tr>
<th>1 Year Plan</th>
<th>Rocks</th>
<th>Issue List</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Future Date:</strong></td>
<td><strong>Future Date:</strong></td>
<td><strong>Issue List</strong></td>
</tr>
<tr>
<td><strong>Revenue:</strong></td>
<td><strong>Revenue:</strong></td>
<td>1.</td>
</tr>
<tr>
<td><strong>Profit:</strong></td>
<td><strong>Profit:</strong></td>
<td>2.</td>
</tr>
<tr>
<td><strong>Measurables:</strong></td>
<td><strong>Measurables:</strong></td>
<td>3.</td>
</tr>
</tbody>
</table>

### Goals for the Year

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

- Focus/Theme
- Roles and Responsibilities
- Cash flow analysis/budget
- Scorecard

### Rocks for the Quarter

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

### Prioritize

- Identify
- Discuss
- Solve
WHAT IS YOUR CORE FOCUS?
It doesn’t take much for an organization to get off track in the hustle and bustle of the business world. Businesses can easily become distracted by opportunities that are wolves in sheep’s clothing. Others falsely assume that since they are succeeding in one business, they can succeed in any. Others simply get bored.

Your job as a leadership team is to establish your organization’s core focus and not to let anything distract you from that. Many things have the potential to distract us from our core focus. Steve, a member of one leadership team, calls it “shiny stuff.” A competitor, a new idea, a new product, and poor advice that looks like good advice at the time are just a few examples.

The central concept of a core focus has been given many different names over time, including “mission statement,” “vision statement,” “core business,” “sweet spot,” “the zone,” and “the ball” (as in “keep your eye on the”). In his book The 8th Habit, Stephen Covey calls it “voice.” Dan Sullivan calls it Unique Ability®. And in Good to Great, Jim Collins calls it “the hedgehog concept.” I call it core focus because it should come from your company’s core and you must stay laser-focused on it.

Russell H. Conwell’s story “Acres of Diamonds” illustrates this point well. To paraphrase: There was once a man named Ali who owned a large farm with many orchards. Ali was perfectly content with his lot in life until one day, when a local
1. Why does your organization exist?  
What is its purpose, cause, or passion?  
When your purpose, cause, or passion is clear, you won’t be able to tell what business you’re in. You should be able to take it into any industry. This will also keep you from confusing it with your niche.

When entering your core focus into the electronic version of the V/TO, please choose one of the three words “purpose,” “passion,” or “cause”—the one that resonates best with your team—and delete the others from the document. Less is more.

When your purpose, cause, or passion is clear, it should meet all eight points of the following 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.

Examples of purposes, causes, or passions

Cunningham/Limp: Customer delight  
McKinley: To enrich the quality of life in our communities  
Image One: To build a great company, with great people & great results  
Schechter Wealth Strategies: To create lifelong relationships and raving fans

2. What is your organization’s niche?  
Your niche should be simple. It will ultimately become a filtering mechanism
THE EOS PROCESS™

- About Us
- About You
- The Tools
- The Process

- Hitting the Ceiling
  - Accountability Chart
  - Rocks
  - Meeting Pulse
  - Scorecard

- Core Values
  - Core Focus
  - 10 Year Target
  - Marketing Strategy
  - 3 Year Picture
  - 1 Year Plan
  - Quarterly Rocks
  - Issues List

- Focus & Traction
  - Team Health
  - Quarterly Rocks
  - Issue Solving
  - Toolbox Tools
  - Accountability

- Quarterly Pulsing
- Annual Planning
- Qtr
- Qtr
- Qtr
**THE VISION/TRACTION ORGANIZER™**

**ORGANIZATION NAME:**

### VISION

| CORE VALUE | 1. FLEXIBLE  
2. INNOVATIVE  
3. RESPECTFUL  
4. SPIRITED  
5. TEAM |
|---|---|

### 3 YEAR PICTURE

- **Future Date:**
- **Revenue:**
- **Profit:**
- **Measurables:**
  - What Does It Look Like?
    - 3 total $1.5M+ clients
    - 3 total $1M+ clients
    - 15 total $200k+ clients
    - 50% of new projects are new clients
    - Our own location
    - Lettershop capabilities
    - Properly incented employees
    - Company wide automation
    - Great reputation/thought leader in industry
    - More associations-writing, speaking PIA, MFSA, Red Tag
    - Fending off acquisition

### CORE FOCUS™

- **Passion:** Create raving fans through living our core values
- **Our Niche:** Being your Canadian logistics “partner”

### 10 YEAR TARGET

- **$25 million in revenue at a 10% net margin**

### MARKETING STRATEGY

- **Target Market/”The List”:** 1. Mail producers in that are able and willing to go after their Canadian direct marketing mail 2. Major accounts using international providers for their Canadian mail
- **Three Uniques:** 1. Canadian expertise 2. Understand the value chain 3. The Right Route Solution
- **Proven Process:** The Right Route Solution
# The Vision Component

## The Vision/Traction Organizer™

**Organization Name:** RCS International

### Traction

<table>
<thead>
<tr>
<th>1 Year Plan</th>
<th>Rocks</th>
<th>Issue List</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Future date:</strong> December 31, 20XX</td>
<td><strong>Future date:</strong> September 11th, 20XX</td>
<td><strong>Issue List</strong></td>
</tr>
<tr>
<td><strong>Revenue:</strong> $10 million</td>
<td><strong>Revenue:</strong> $2 million</td>
<td>1. Operations facility</td>
</tr>
<tr>
<td><strong>Measurables:</strong> 30 clients/projects greater than $50k each (annualized)</td>
<td><strong>Measurables:</strong> 20 clients/projects greater than $50k each (annualized)</td>
<td>2. Exchange rate</td>
</tr>
</tbody>
</table>

### Goals for the Year

1. Hire a controller
2. 14 new projects > $50k (half new clients)
3. Sales software to capture the list and manage sales funnel
4. 8 association touches
5. Implement an Operating System
6. 
7. 

### Rocks for the Quarter

<table>
<thead>
<tr>
<th>Rocks for the Quarter</th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Create and execute sales strategy with metrics</td>
<td>Joe</td>
</tr>
<tr>
<td>2. Revitalize culture: - 4 hr simple quote - Phones 8:30-5:30 - Monthly events - Core values</td>
<td>Bob</td>
</tr>
<tr>
<td>3. Fill the pipeline w/3000 names</td>
<td>Patrick</td>
</tr>
<tr>
<td>4. Launch the website</td>
<td>Joe</td>
</tr>
<tr>
<td>5.</td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
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<tr>
<td>7.</td>
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</tr>
</tbody>
</table>
The People Analyzer is designed to clarify whether you have the right person in place or not. This is one of the top five tools used by all my clients. The concept was actually created by my dad back in the early 1970s for evaluating salespeople, and I have altered it into a tool that helps evaluate an individual’s core values. The People Analyzer template can be downloaded from www.eosworldwide.com/people.

First, put the names of the people you’re going to analyze in the left column. Then list your core values across the top. Then rate each person according to his or her adherence to the core values. Give one of three ratings:

+  He or she exhibits that core value most of the time.

+/- Sometimes he or she exhibits the core value and sometimes he or she doesn’t.

-  He or she doesn’t exhibit the core value most of the time.

You will notice in the preceding example, John is absolutely the right person for your organization, George is very much on the fence, and Sally must go.

The ideal you’re shooting for in your organization is to surround yourself with 100 percent of the right people, who look just like John does. However, this is only an ideal, so don’t get caught up in perfection. What your leadership team has to do is determine what the bar is. The “bar” is the minimum standard you will accept from the People Analyzer results. The power of setting the bar is that you give all managers absolute clarity on what is acceptable and what is not.
Assuming that three major functions exist in all organizations, the next truth is that they must all be strong.

I’ve had many debates about whether sales and marketing is the most important function. The argument is always that until somebody sells something, nothing else happens. That’s hard to disagree with. But realistically, all three have to be strong.

To make the point, let’s consider three scenarios:

- You have a strong sales and marketing function, a weak operations function, and a strong financial function. What’s the net effect? In that scenario, you’re doing a great job selling and bringing in new customers, but you’re losing them right out the back because operations is not delivering what you promised and customers aren’t happy.

- You have a strong sales and marketing function, a strong operations function, and a weak financial function. What’s the net effect? Again, you’ll bring in a lot of customers and take good care of them, but money is coming in the front door and going right out the back due to a lack of financial controls: $10 million in and $10 million out, or worse, $10 million in and $10.2 million out. This may strike a nerve because many companies fall into a situation where there is no monitoring of spending, nor is individual customer profitability assessed.
That is the basic structure of the Accountability Chart. With that understanding, two other very important factors need to be taken into account when creating the right structure for your organization.

First of all, when customizing the Accountability Chart for your company, the three major functions might split into more functions. For example, sales and marketing sometimes splits into a distinct sales function and a distinct marketing function. Operations sometimes splits into two or three distinct functions such as delivery, project management, or customer service. Finance and administration can split into as many as four: finance, administration, information technology (IT), and human resources (HR).

Depending on the size and state of your organization, you will end up with anywhere between three and ten major functions on that front line. As long as you stay focused on what the right structure is for your organization, the right number will come. Please remember, though, less is more. Not one EOS client has more than seven major functions.

The second factor is another major function that is not on the front line. In my experience, when a company creates its Accountability Chart, half the time they
As you construct your Accountability Chart, a few words of caution: Create only the structure first. Don’t put any names in any of the boxes yet. In other words, illustrate the correct functions at all levels in the organization. This method will keep you honest with yourself and lead you to the best structure. Once the right structure is set, then put the right people in the right seats. When you choose someone for that seat, you want to be certain that person is operating in his or her Unique Ability®.

When you’re finished, the Accountability Chart should look like an organizational chart, with five bullets that illustrate the major roles of each function. Important note: The Accountability Chart will clarify function, role, and reporting structure, but it will not define communication structure. Your communication should flow freely across all lines and departments where necessary, creating an open and honest culture. With each position’s accountability clear and communication crossing all departments, you will avoid cross-departmental issues. The Accountability Chart should in no way create silos or divisions.
Life is much easier for everyone when you have people around you who genuinely get it, want it, and have the capacity to do it.

With GWC now clear, incorporate it into your People Analyzer. When you’re evaluating your people, the rating on GWC should be a black-and-white “yes” or “no,” unlike the pluses and minuses for core values. You must get a “yes” on all three, or the person is in the wrong seat.

**Table:**

<table>
<thead>
<tr>
<th>NAME</th>
<th>Be Humble</th>
<th>Confident</th>
<th>GROW or DIE</th>
<th>HELP First</th>
<th>Do the Right Thing</th>
<th>Do What You Say</th>
<th>WANT IT</th>
<th>Capacity to Do It</th>
</tr>
</thead>
<tbody>
<tr>
<td>JOHN SMITH</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
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<tr>
<td>SALLY JONES</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>YES</td>
<td>NO</td>
<td>YES</td>
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<tr>
<td>GEORGE WILSON</td>
<td>+/-</td>
<td>+/-</td>
<td>+/-</td>
<td>+/-</td>
<td>NO</td>
<td>YES</td>
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</table>

**ONE NAME, TWO SEATS**

You can have one name in two seats, just not two names in one seat. When an organization first starts out, the founding entrepreneur occupies every seat. He or she is the one name in all seats. He or she is the integrator, the head of sales and marketing, the head of operations, and the head of finance. As the organization grows, new people are brought in to fill the seats needed. For instance, once the entrepreneur reaches capacity, he or she then brings in someone to run operations and is able to let go of that major function.

If you’re at a point where you have people in more than one seat—for instance, your bookkeeper is also your shipping person and your customer service person—that is okay, as long they have enough time to do both jobs well. It’s a matter of the size of the organization. If they or you don’t have enough time to be in all seats, that will have to change. This leads us to the next point.
are over 400 different Scorecards. Your Scorecard will be unique to you and your organization. The following exercise will show you a step-by-step process for creating a Scorecard that fits your unique business.

**STEP 1**
Spend an hour with your leadership team. Imagine you’re on a desert island somewhere. None of you can talk to anyone, access e-mail, or talk on the phone. All you have is a piece of paper with a handful of numbers on it. These numbers must allow you to have an absolute pulse on your business. What are all of the numbers that must be on that piece of paper? Decide and list all of the categories that you’d need to track on a weekly basis to have that pulse.

These categories should include items such as weekly revenue, cash balances, weekly sales activity, customer satisfaction/problems, accounts receivable and payable, and client project or production status, to name a few.
Sachse Construction
Circle of Life

Project & Corporate Accounting
- Prepare owner pay applications and process payments to subcontractors for construction and architectural projects
- Process general operation expenses and payments
- Process employee payroll
- Maintain company financial records
- Prepare closeout manuals for owners at completion of project

General & Administrative Services
- Prepare project manuals and documents for use by owners, subcontractors, and superintendents
- Maintain office supply inventories and track purchases and usage
- Coordinate purchase or lease of office and field equipment
- Direct incoming phone calls and written communication to appropriate staff
- Coordinate and administer employee benefits

Information Technology
- Manage all hardware and software computer resources
- Provide new user setup and training

Construction Services
- Schedule and coordinate subcontractors from start to completion of work
- Communication with owner and architect to review progress, RFI's, and change requests
- Review and approve submittals, as-built drawings, and other construction documentation
- Respond to warranty work requests and oversee repairs
- Accumulate required closeout documentation for owner and job records

Business Development
- Prepare proposals and qualification statements to procure sales
- Prepare & negotiate Construction Contracts
- Public Relations and Sales Material preparation
- Marketing/Website Development

Architectural Services
- Procure space planning projects
- Develop Space Plans
- Prepare Construction Documents
- Review and approve submittals during the construction phase
- Respond to RFI's from the construction superintendent

Estimating & Procurement
- Review plans and specifications for potential projects
- Solicit and qualify subcontractor bids
- Prepare proposal of costs to owner for potential projects
- Finalize scope of work and pricing for awarded projects and issue subcontractor agreements
STEP 7
Share the company Rocks with the entire organization. As you learned in the Vision Component, the vision must be shared by all. Every quarter you should meet with the entire organization for your state-of-the-company meeting for no more than 45 minutes to share successes, progress, and the V/TO and to unveil the company Rocks for the quarter. Remember, people sometimes have to hear something seven times before they really hear it for the first time, and this is one of the ways they will ultimately share the vision.

STEP 8
Have each department set their Rocks as a team. Just as the leadership team sets their Rocks, each department team follows the exact same process to set

**Rocks due by March 31, 2007**

**Company Rocks**

1. Close $1 million in new business  
   **Owner**  
   BL
2. Document delivery process and train all  
   **Owner**  
   AM
3. Narrow CFO candidates to two  
   **Owner**  
   JK
4. Implement new IS software  
   **Owner**  
   SP

**Bill’s Rocks**

1. Close $1 million in new business  
2. 10 new prospects in the pipeline  
3. Hire one new salesperson

**John’s Rocks**

1. Narrow CFO candidates to two  
2. Finalize and implement new hire orientation  
3. Increase line of credit to $1 million

**Amy’s Rocks**

1. Document delivery process and train all  
2. Create customer feedback system  
3. Update database  
4. Proactively contact top 10 clients  
5. Revise and recommunicate Accountability Chart

**Sam’s Rocks**

1. Implement new IS software  
2. Roll out our new website  
3. Retrain all on A/R and A/P policy  
4. Finalize new client contracts
passionate, intense, productive meeting and got back on track again. Yet after another 90 days, I had to hold another meeting because I did not even recognize my team. “What happened to the people who were participating in that intense meeting 90 days ago?” I wondered. We couldn’t be further off the same page. But just like clockwork, by the end of the meeting, we were fired up and on the same page yet again.

I soon realized it was a normal cycle. When I really thought about the problem, I noticed it affected my Entrepreneurs’ Organization forum group, my friends, and my family. It seems to be human nature. Of the 1300 full-day sessions I’ve conducted, at least 900 have been quarterly sessions. People whose focus was clear in the prior quarterly session became unfocused by the following one. I would see absolute agreement on core issues the previous quarter and then total disagreement in the current one. By the end of the session, though, everyone would be back on track. In some situations, people didn’t even remember agreeing. Fortunately, I kept very good notes and could prove that they did.

Realizing this cycle was normal, I changed my attitude. First, I stopped getting frustrated and accepted it. Second, I decided to put together a great agenda for a powerful quarterly meeting every time. Now all EOS clients follow this exact same agenda in their quarterlies.
THE WEEKLY MEETING PULSE

The traction process continues taking the vision down to the ground. We are now narrowing in from quarterly to weekly. Implementing this step will really create traction and help you execute the vision. Once the quarterly priorities are set, you must meet on a weekly basis to stay focused, solve issues, and communicate. As you can see by the following model, the Weekly Meeting Pulse is your opportunity to make sure that everything is on track. If you’re on track for the week, then you’re on track for the quarter, and if you’re on track for the quarter, then you’re on track for the year, and so on. The Meeting Pulse, like a heartbeat, creates a consistent flow that keeps the company healthy. Put another way, the Meeting Pulse creates a consistent cadence that keeps the organization in step.

ALWAYS A LEVEL 10 MEETING

How would you rate your meetings on a scale from 1 to 10? The response is almost always somewhere between a 4 and a 5. That is simply not good enough. Most meetings in business are weak and not very productive, and yours probably are too. By implementing the ingredients of the Level 10 Meeting, you will raise that rating up to a 10.
**LEVEL 10 WEEKLY MEETING AGENDA***

<table>
<thead>
<tr>
<th>SEGUE</th>
<th>5 min</th>
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</thead>
<tbody>
<tr>
<td>SCORECARD</td>
<td>5 min</td>
</tr>
<tr>
<td>ROCK REVIEW</td>
<td>5 min</td>
</tr>
<tr>
<td>CUSTOMER/EMPLOYEE HEADLINES</td>
<td>5 min</td>
</tr>
<tr>
<td>TO-DO LIST</td>
<td>5 min</td>
</tr>
</tbody>
</table>
| • John to call ABC Co.  
| • Bill to have a meeting with Sara  
| • Sue will call the supplier  
| • Jack to revise core values speech |
| IDS            | 60 min |
| • Winter sales are down  
| • We missed the delivery date on ABC  
| • A/R is over 60 days  
| • Charles is not following the process |
| CLOSE          | 5 min |

*Notice how the to-dos and issues are built right into the agenda.*

Be patient with the Weekly Meeting Pulse. Your first meeting will be awkward, but as you stay committed to it, it will become very comfortable. The level of team health, communication, and results will consistently rise.

**THE WEEKLY MEETING ROLLOUT**

Once you master the Weekly Meeting Pulse as a leadership team, the next step is to roll it out to each department. Clients typically take about three months to institute the Weekly Meeting Pulse throughout their organization, because the leadership team must master it first. Departmental weekly meetings are typically closer to 30 to 60 minutes. Use the Level 10 Meeting Agenda as a guide for customizing your departmental meeting agendas. Just make sure that at least 50 percent of the meeting time is spent solving issues.
Since beginning The EOS Process, The Benefits Company has experienced 30 percent growth on average every year for the last five years. To say that it’s gaining traction would be an understatement.

Filling out the Organizational Checkup at least twice every year shows you how you’re progressing as an organization. Together with your leadership team, you can find the gaps between where you are and where you want to go. The gaps are issues that go on the Issues List. You can then determine if they are a high enough priority to tackle. If so, the solutions become goals, Rocks, and to-dos for the coming year.

For example, say you rate yourselves a 3 out of 5 on the fifth statement, “Our target market is clear, and our sales and marketing efforts are focused on it.” You might decide that a Rock for this quarter is for the sales manager to redefine your target market, clean up your sales pipeline, and train all salespeople on it.

Another example might be that you rated yourselves a 4 out of 5 on the first statement, “We have a clear vision in writing that has been properly communicated and shared by everyone.” You realize the gap is that not everyone shares the vision and you have not been sharing it often enough. As a result you set a Rock for the quarter to address several people who do not share the vision and to make a decision on their future. In addition, someone has a todo to schedule a meeting with everyone to share the vision again and get back on track with quarterly company meetings.

**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. We have a clear vision in writing that has been properly communicated and is shared by everyone.

2. Our core values are clear, and we are hiring, reviewing, rewarding, and firing around them.
3. Our core business is clear, and our systems and processes reflect that.

4. Our 10-year target is clear and has been communicated to everyone.

5. Our target market is clear, and our sales and marketing efforts are focused on it.

6. Our differentiators are clear, and all of our sales and marketing efforts communicate them.

7. We have a proven process for doing business with our customers. It has been named and visually illustrated, and everyone is adhering to it.

8. All of the people in our organization are the right people.

9. Our Accountability Chart (organizational chart of roles and responsibilities) is clear, complete, and constantly updated.

10. Everyone is in the right seat.

11. Our leadership team is open and honest, and demonstrates a high level of trust.

12. Everyone has Rocks and is focused on them (3 to 7 priorities per quarter).

13. Everyone is engaged in regular weekly meetings.

14. All meetings are on the same day and at the same time each week, have the same printed agenda, start on time, and end on time.
15. All teams clearly identify, discuss, and solve key issues for the greater good and long term.

16. Our systems and processes are documented, simplified, and followed by all.

17. We have a system for receiving regular customer and employee feedback, and we know their level of satisfaction.

18. A Scorecard for weekly metrics and measurables is in place.

19. Everyone in the organization has a number.

20. We have a budget and are monitoring it regularly (i.e., monthly or quarterly).

Total number of each ranking

Multiply by the number above ×1 ×2 ×3 ×4 ×5

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

One more example might be that you rated yourselves 2 out of 5 on statement number 16: “Our systems and processes are documented, simplified, and followed by all.” Seeing this gap, you agree as a team once and for all to make it a goal for this year to finally document your core processes.

Filling out the Organizational Checkup at least twice every year will clarify all gaps, put those issues into action, and ultimately enable you to continue to climb toward 100 percent. The goal is progress, not perfection. You might feel frustrated because you’re not at 88 percent like the Benefits Company. Yet success is not based on where you are, but on how far you have come. If you were at 55 percent last year and at 63 percent this year, that’s success. The next year you’ll be at 72 percent and maybe 80 percent in the year after that. Keep using the principles, and you’ll break through.