



How are you  
feeling today?



# Feelings List

| ANGRY      | ANXIOUS  | SAD       | CONFIDENT | HAPPY      | CONTENT    |
|------------|----------|-----------|-----------|------------|------------|
| Irritated  | Scared   | Gloomy    | Brave     | Joyful     | Calm       |
| Frustrated | Worried  | Helpless  | Powerful  | Love       | Secure     |
| Mad        | Afraid   | Guilty    | Inspired  | Optimistic | Safe       |
| Critical   | Stressed | Hurt      | Curious   | Energetic  | Discerning |
| Hurt       | Shocked  | Hopeless  | Strong    | Valued     | Balanced   |
| Hostile    | Ashamed  | Miserable | Creative  | Cheerful   | Reflective |
| Furious    | Insecure | Drained   | Important | Connected  | Grateful   |
| Offended   | Rejected | Bored     | Energy    | Excited    | Trusting   |
| Annoyed    | Uneasy   | Tired     | Hopeful   | Interested | Relaxed    |



# Tulips

I believe that life blooms when we embrace the enchantment of what can be, and when we have the courage to go after what we love and let it grow.

Grace

Believe

Create  
More Joy

Be Bold

Thirst for Learning





# fifty flowers

THE FLOWER CEO











# Work smarter not harder

- What is EOS
- How I implemented EOS
- Time for Questions



# MY FLOWER

---

- Daffodil  
– Rebirth and Hope





# GAIN TRACTION IN YOUR BUSINESS

Six Keys to Getting What You Want  
from your Entrepreneurial Company

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**[JENNIFER DEROIN, Certified EOS Implementer®]**



# FRUSTRATIONS

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



**THE  
EOS  
MODEL®**

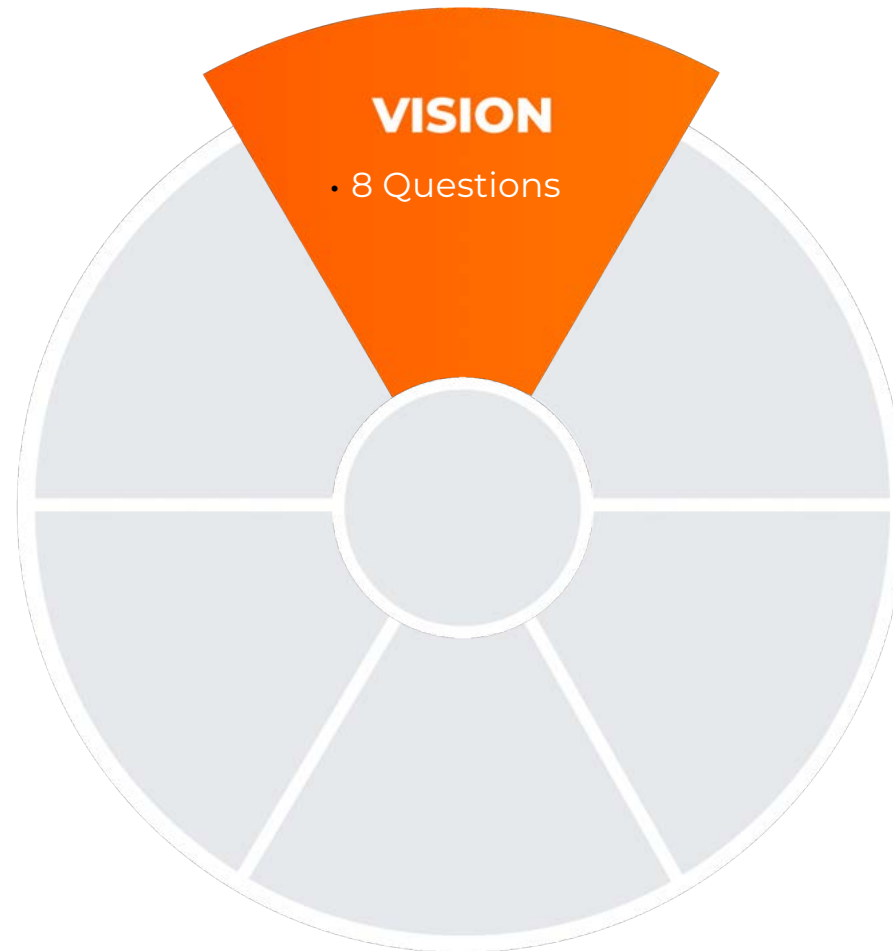


“Vision without traction  
is hallucination.”

**–GINO WICKMAN**



# THE EOS MODEL



# THE VISION/TRACTION ORGANIZER™



## 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><b>Purpose/Cause/Passion:</b></p> <p>Our Niche:</p>  |   |
| <b>10-YEAR TARGET™</b>    | <p>_____</p> <p>_____</p>   |   |
| <b>MARKETING STRATEGY</b> | <p><b>Target Market/"The List":</b></p> <p><b>Three Uniques™:</b>   <ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> </ol></p> <p><b>Proven Process:</b></p> <p><b>Guarantee:</b></p> |   |
|                           |   | <p><b>Future Date:</b></p> <p><b>Revenue:</b></p> <p><b>Profit:</b></p> <p><b>Measurables:</b></p> <p><b>What Does It Look Like?</b></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> <li>•</li> </ul> |





## THE VISION/TRACTION ORGANIZER™

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

### TRACTION

| 1-YEAR PLAN  | ROCKS  | ISSUES LIST           |     |          |       |          |       |          |       |          |       |          |       |          |       |          |       |  |
|--|--|-----------------------|-----|----------|-------|----------|-------|----------|-------|----------|-------|----------|-------|----------|-------|----------|-------|--|
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|                           |  |  |                        |
|---------------------------|--|--|------------------------|
|                           | 1.   |  | <b>3-YEAR PICTURE™</b> |
| <b>CORE VALUES</b>        | 1.<br>2.<br>3.<br>4.<br>5.   |  |                        |
| <b>10-YEAR TARGET™</b>    |  |  |                        |
| <b>MARKETING STRATEGY</b> | Target Market/"The List":<br><br>Three Uniques™: 1.<br>2.<br>3.<br><br>Proven Process:<br>Guarantee: |  |                        |

- Discover
- Define
- Live and Breathe



|                           |  |                            |
|---------------------------|--|----------------------------|
|                           | 1.   | <b>3-YEAR PICTURE™</b>     |
| <b>CORE FOCUS™</b>        | <b>Purpose/Cause/Passion:</b><br><br><b>Our Niche:</b>   |                            |
| <b>10-YEAR TARGET™</b>    | _____<br>_____<br>_____  | •<br>•<br>•<br>•<br>•<br>• |
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|                        |   |   |
|------------------------|---|---|
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| <b>10-YEAR TARGET™</b> | <hr/> <hr/>   |   |
| CORE FOCUS™            | Our Niche:  | What Does It Look Like?   |
| 10-YEAR TARGET™        |   | <ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul> |
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- What do you want from your business?
- 5-30 years out
- #1 Goal

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

|                           |   |
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|   |
|---|
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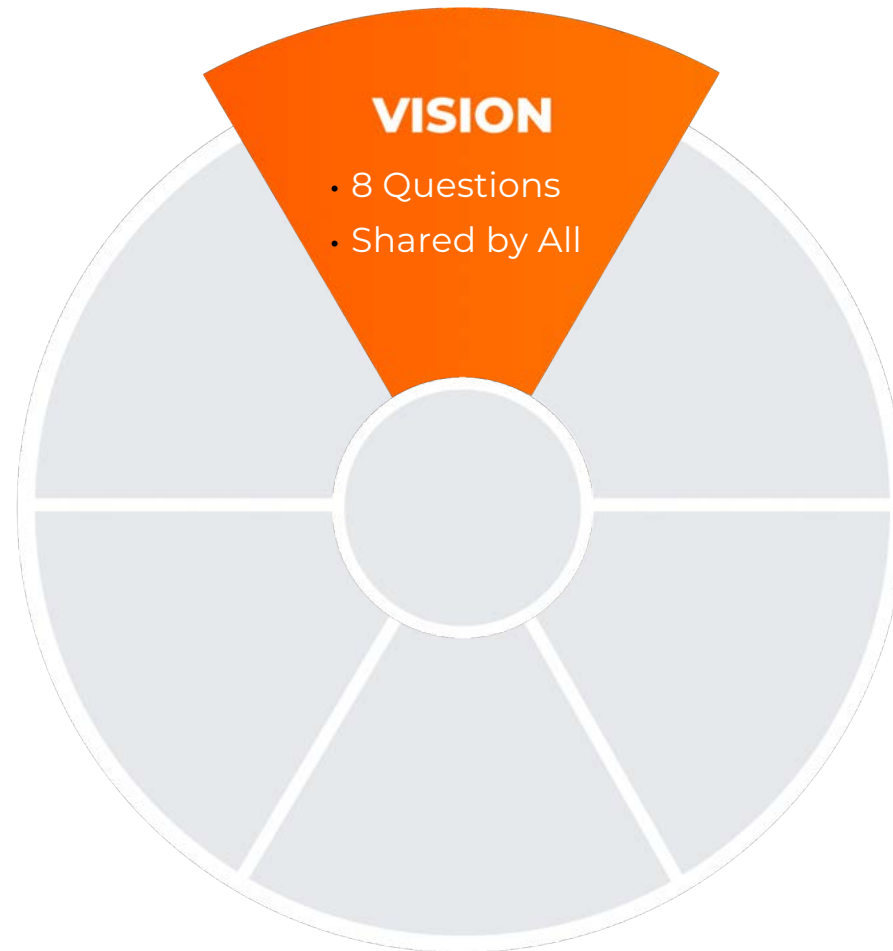
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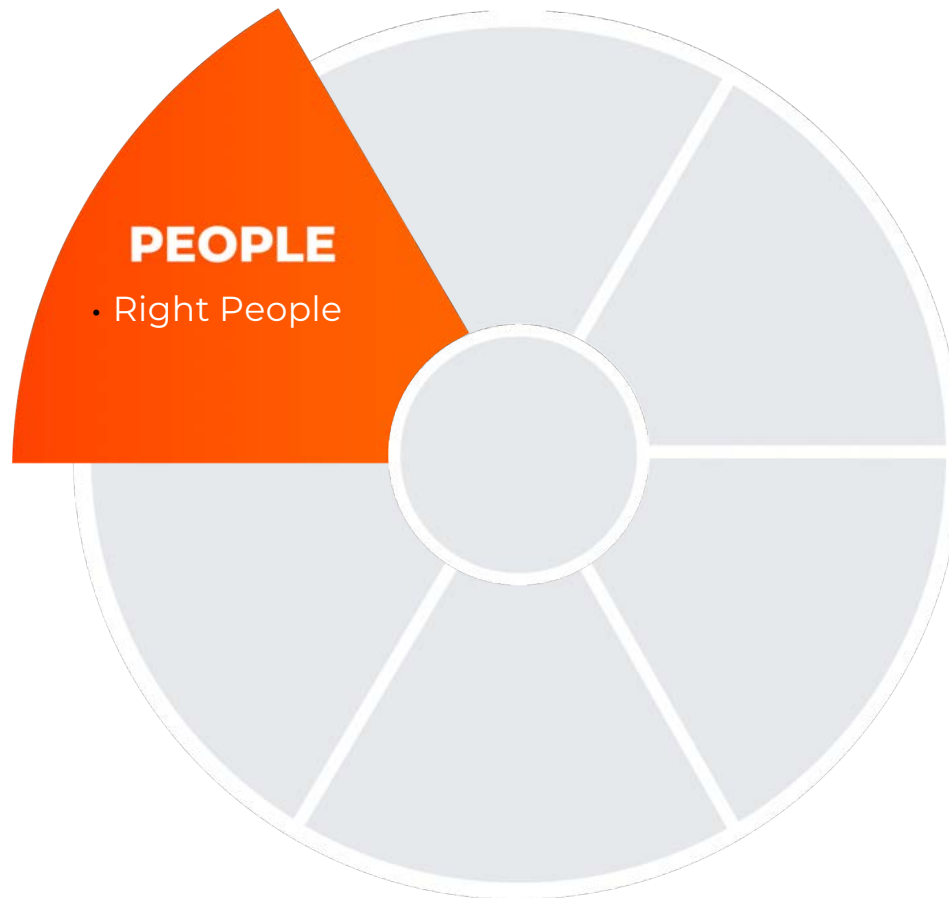


# THE EOS MODEL

**100% Strong**



# THE EOS MODEL

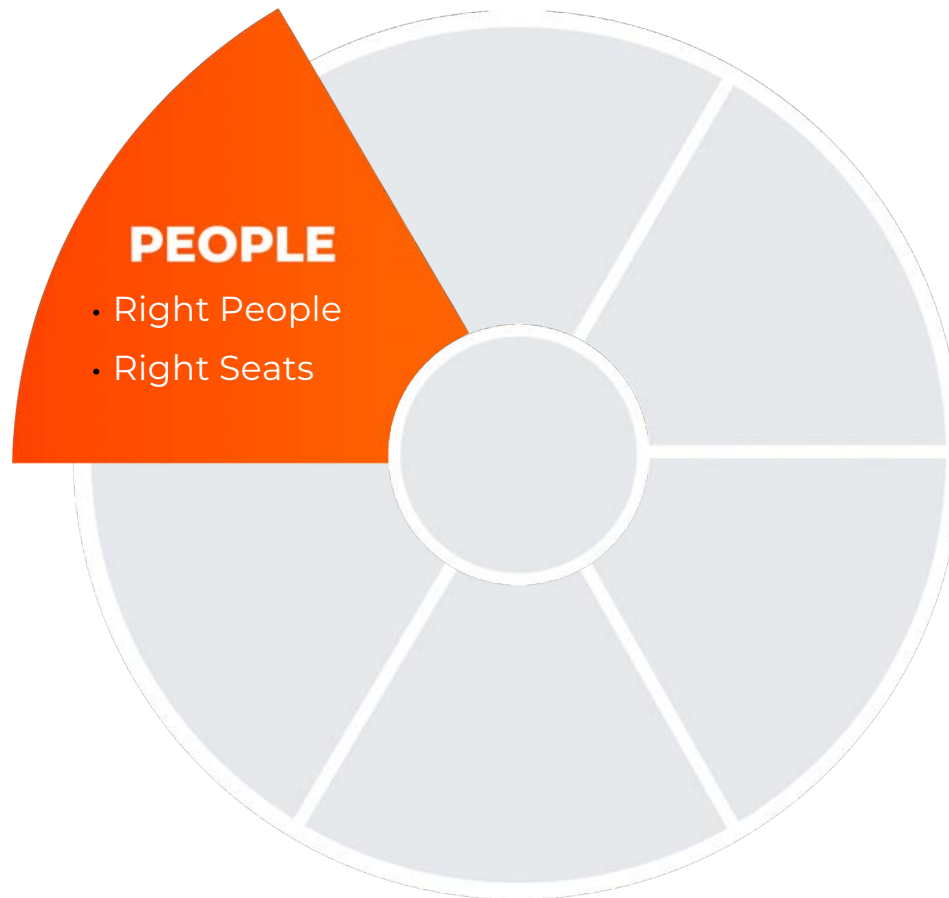


# THE PEOPLE ANALYZER™

| NAME            | <i>Humbly confident</i> | <i>Grow or Die</i> | <i>Help First</i> | <i>Do the right thing</i> | <i>Do what you say</i> |  |  |  |  |  |
|-----------------|-------------------------|--------------------|-------------------|---------------------------|------------------------|--|--|--|--|--|
| Maria Rodriguez | +                       | +                  | +                 | +                         | +                      |  |  |  |  |  |
| John Smith      | -                       | +/-                | -                 | -                         | +/-                    |  |  |  |  |  |
| George Wilson   | +/-                     | +/-                | +                 | +/-                       | +                      |  |  |  |  |  |

| THE BAR         |   |     |   |     |   |  |  |  |  |  |
|-----------------|---|-----|---|-----|---|--|--|--|--|--|
| BATTERY + +/- = | + | +/- | + | +/- | + |  |  |  |  |  |

# THE EOS MODEL

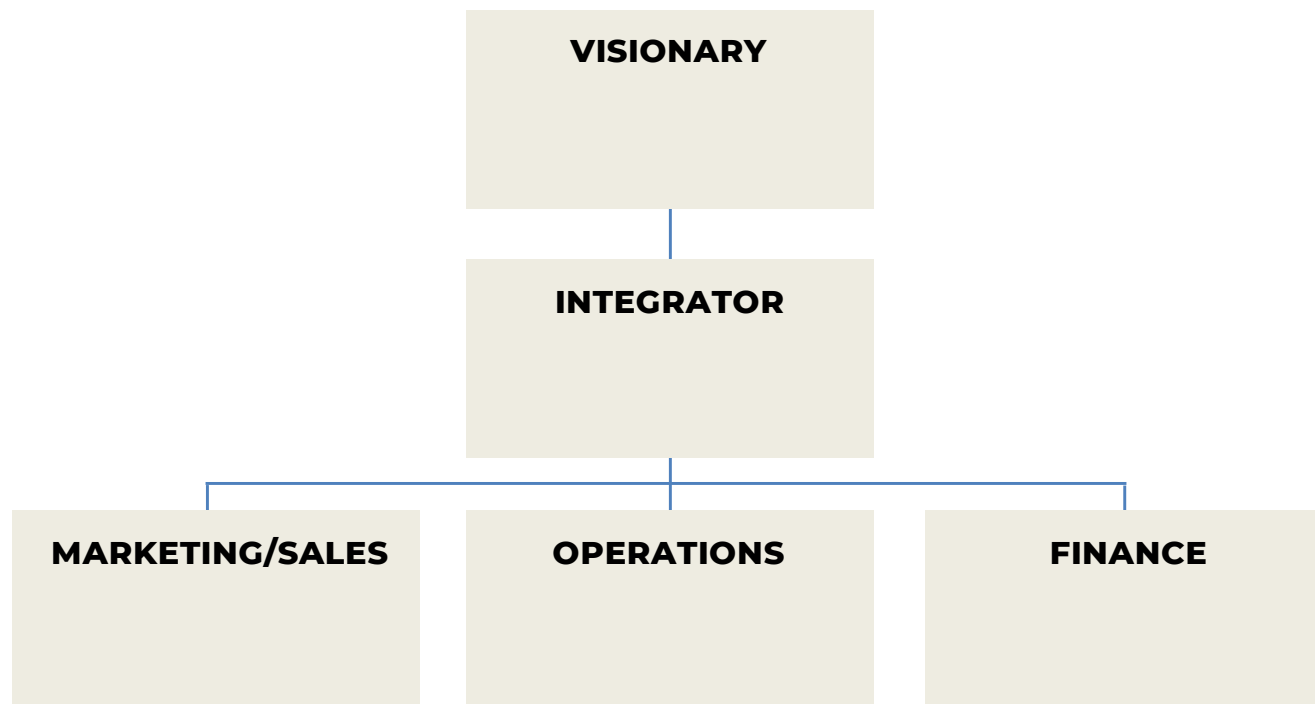




“Structure first,  
people second.”

**-GINO WICKMAN**

# ACCOUNTABILITY CHART™



# RIGHT SEATS

## FUNCTION Name

---

- Role
- Role
- Role
- Role
- Role

# RIGHT SEATS

## Marketing/Sales Name

---

- LMA™
- Marketing
- Lead Generation
- Hit sales numbers
- Account management



# THE PEOPLE ANALYZER™

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

**THE BAR**

|               |   |     |   |     |   |  |  |  |  |  |
|---------------|---|-----|---|-----|---|--|--|--|--|--|
| <b>STATUS</b> | + | +/- | + | +/- | + |  |  |  |  |  |
|---------------|---|-----|---|-----|---|--|--|--|--|--|



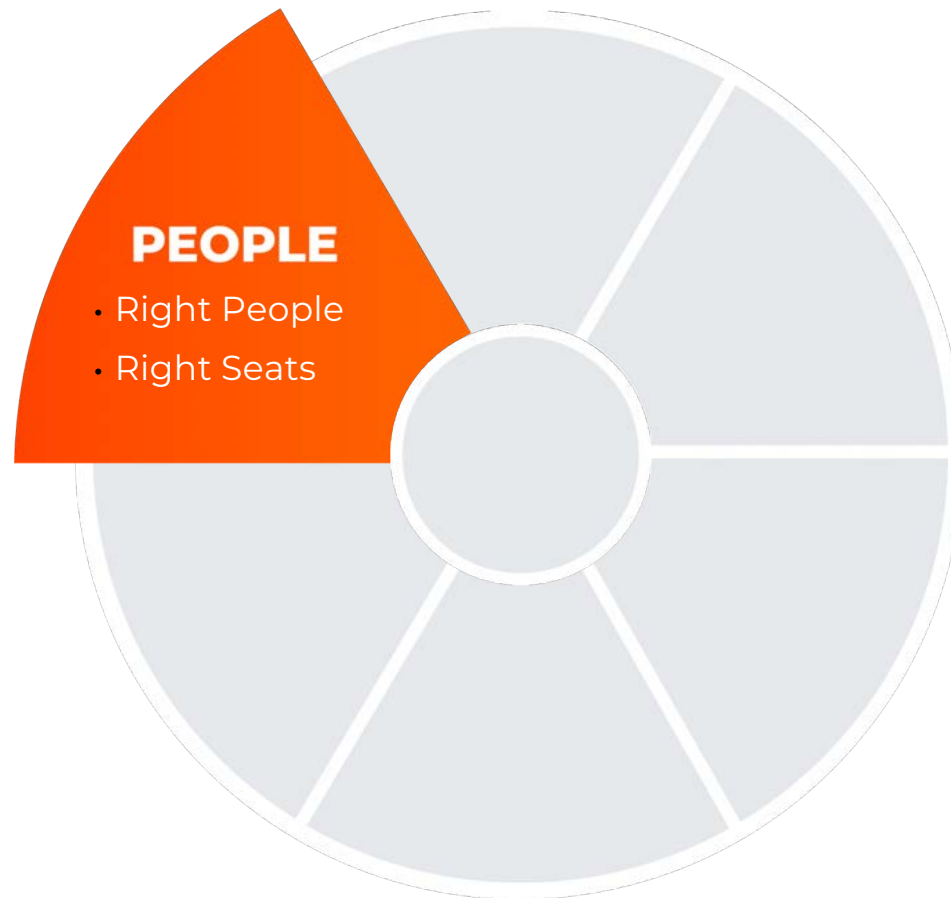
# TWO KINDS OF PEOPLE ISSUES

---

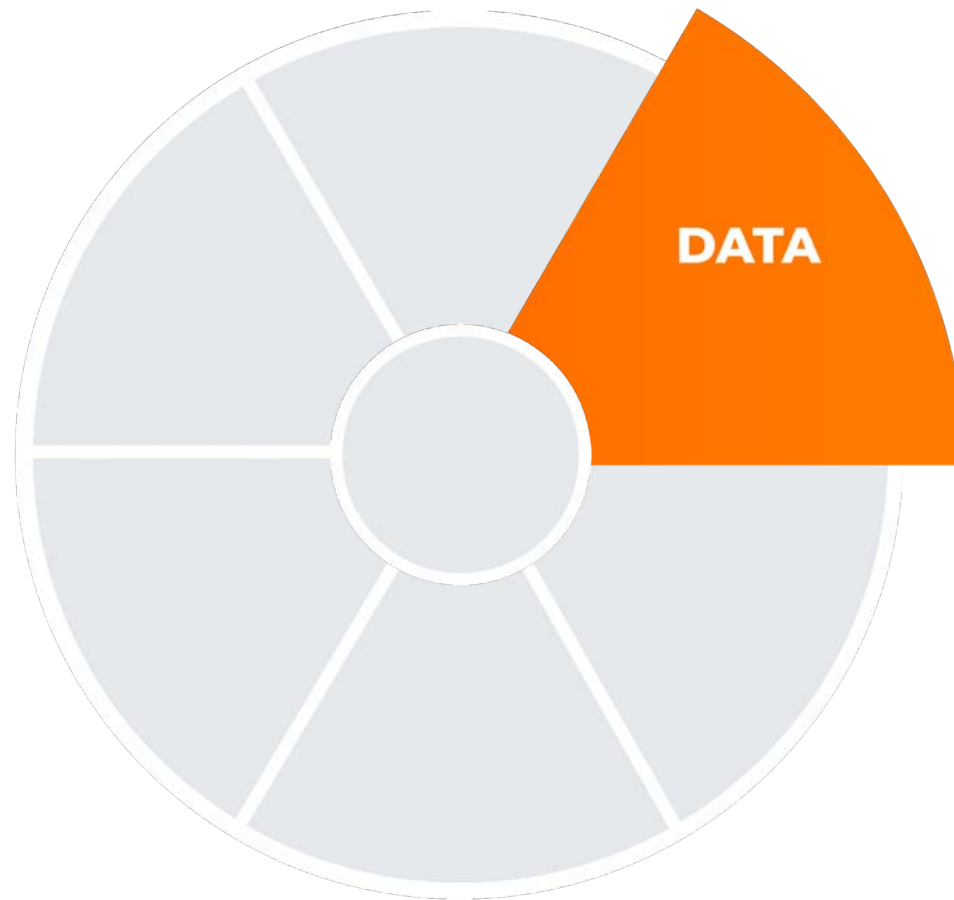
- Right Person, Wrong Seat
- Wrong Person, Right Seat

# THE EOS MODEL

**100% Strong**



# THE EOS MODEL

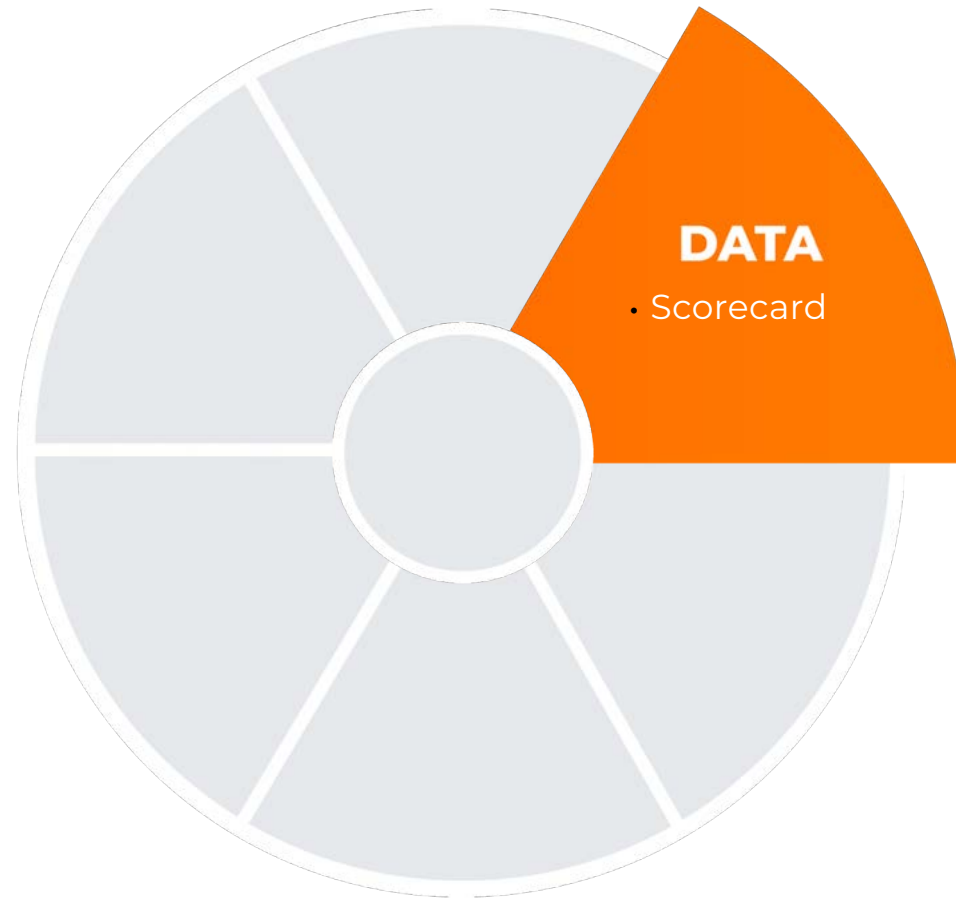


“If we have data, let’s look at the data. If all we have are opinions, let’s go with mine.”

**-JIM BARKSDALE,** *former Netscape CEO*



# THE EOS MODEL

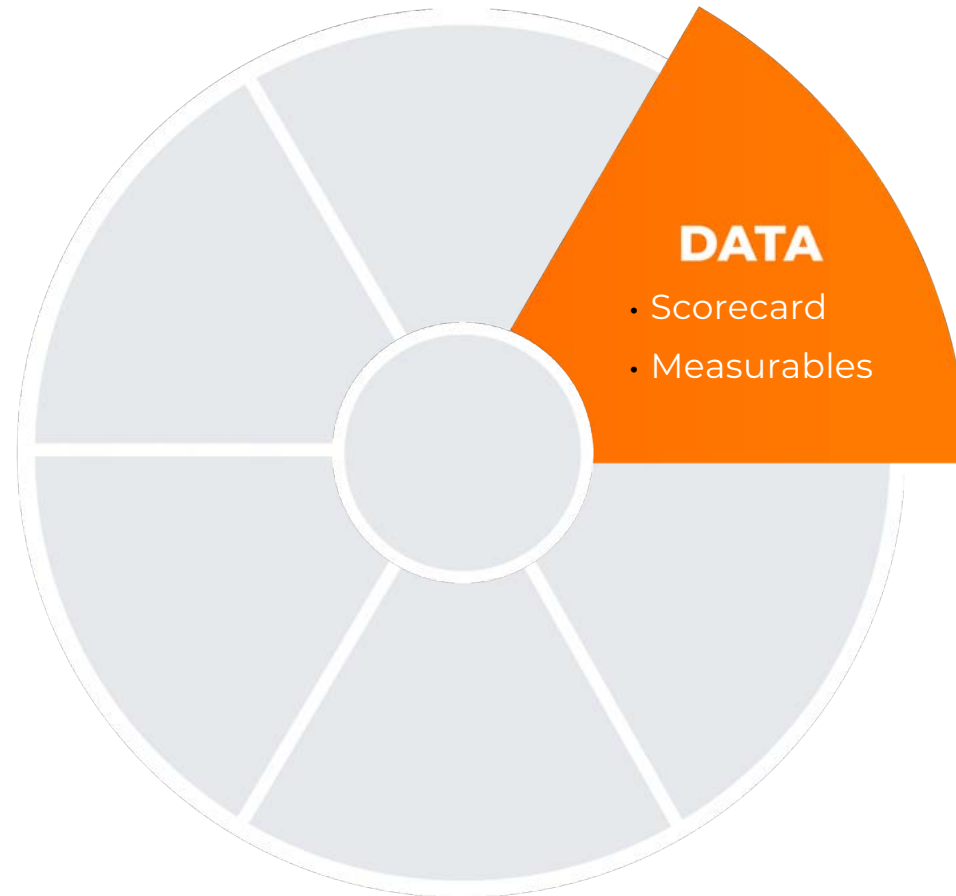


# COMPANY SCORECARD

| 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   | Weekly Revenue        | >=\$84,500 | \$92,000 | \$85,238 | \$81,200 | \$80,934 | \$88,678 | \$88,200 | \$85,321 | \$80,282 | \$95,291 | \$100,281 | \$86,200 | \$78,290 | \$83,498 |
| Anne   | Cash Balance          | >=\$14,245 | \$16,230 | \$15,200 | \$12,289 | \$11,989 | \$14,980 | \$15,123 | \$14,989 | \$11,291 | \$17,281 | \$18,359  | \$15,289 | \$10,221 | \$11,189 |
| Robert | Sales Calls           | 50         | 54       | 55       | 61       | 59       | 32       | 48       | 51       | 72       | 61       | 54        | 50       | 52       | 54       |
| Robert | Sales Meetings        | 10         | 10       | 10       | 10       | 8        | 10       | 10       | 12       | 11       | 15       | 10        | 9        | 8        | 8        |
| Robert | Proposal              | 5          | 5        | 5        | 6        | 5        | 6        | 5        | 6        | 4        | 5        | 8         | 6        | 5        | 5        |
| Robert | Closed Business       | 2          | 2        | 3        | 6        | 3        | 2        | 3        | 5        | 3        | 2        | 1         | 2        | 8        | 4        |
| David  | Customer Satisfaction | >=80%      | 80%      | 80%      | 80%      | 80%      | 80%      | 80%      | 80%      | 80%      | 80%      | 80%       | 80%      | 80%      | 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  | Errors                | <=4        | 3        | 2        | 2        | 2        | 2        | 1        | 2        | 3        | 0        | 0         | 0        | 2        | 1        |
| John   | Utilization/Capacity  | >75%       | 75%      | 76%      | 75%      | 75%      | 75%      | 75%      | 75%      | 82%      | 75%      | 75%       | 78%      | 75%      | 75%      |

# THE EOS MODEL

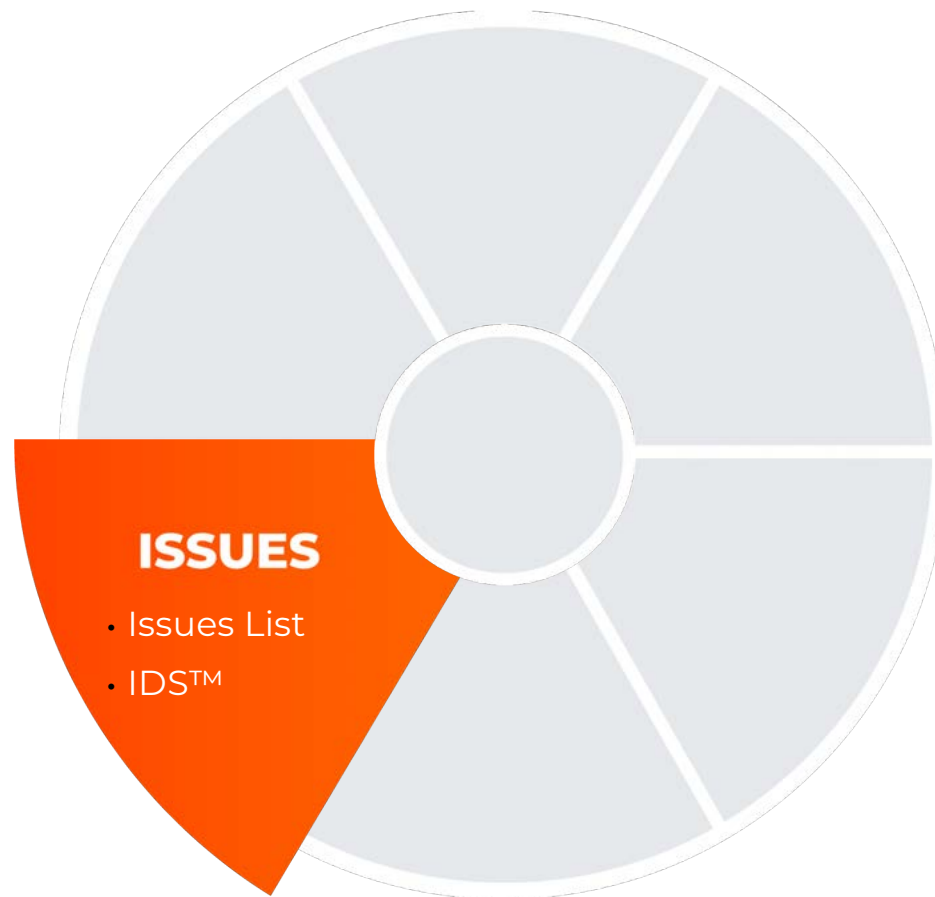
**100% Strong**



# THE EOS MODEL



# THE EOS MODEL



# ISSUES SOLVING TRACK

• Identify

• Discuss

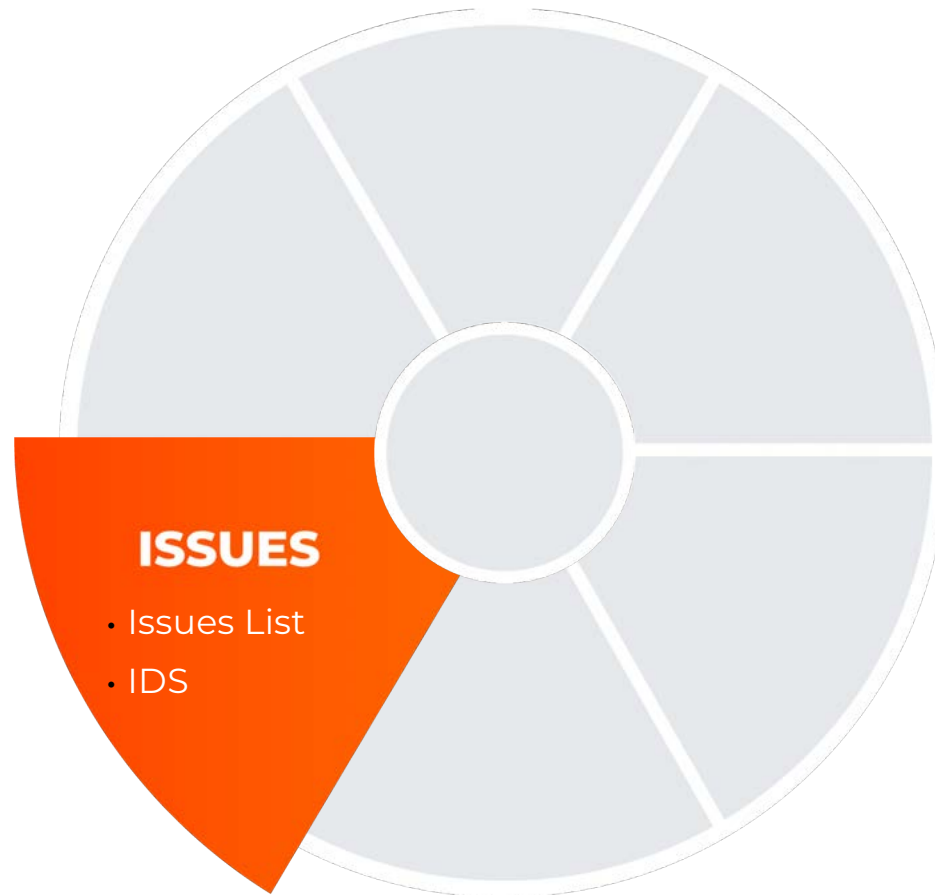
• Solve

## ISSUES LIST

1. Website Rock off-track 2
2. Darren U. Right Person
3. Andi S. Right Seat 1
4. ~~Sales off track~~
5. Anodyne Merger 3
6. Utilization off-track
7. \_\_\_\_\_
8. Western US expansion
9. \_\_\_\_\_
10. \_\_\_\_\_

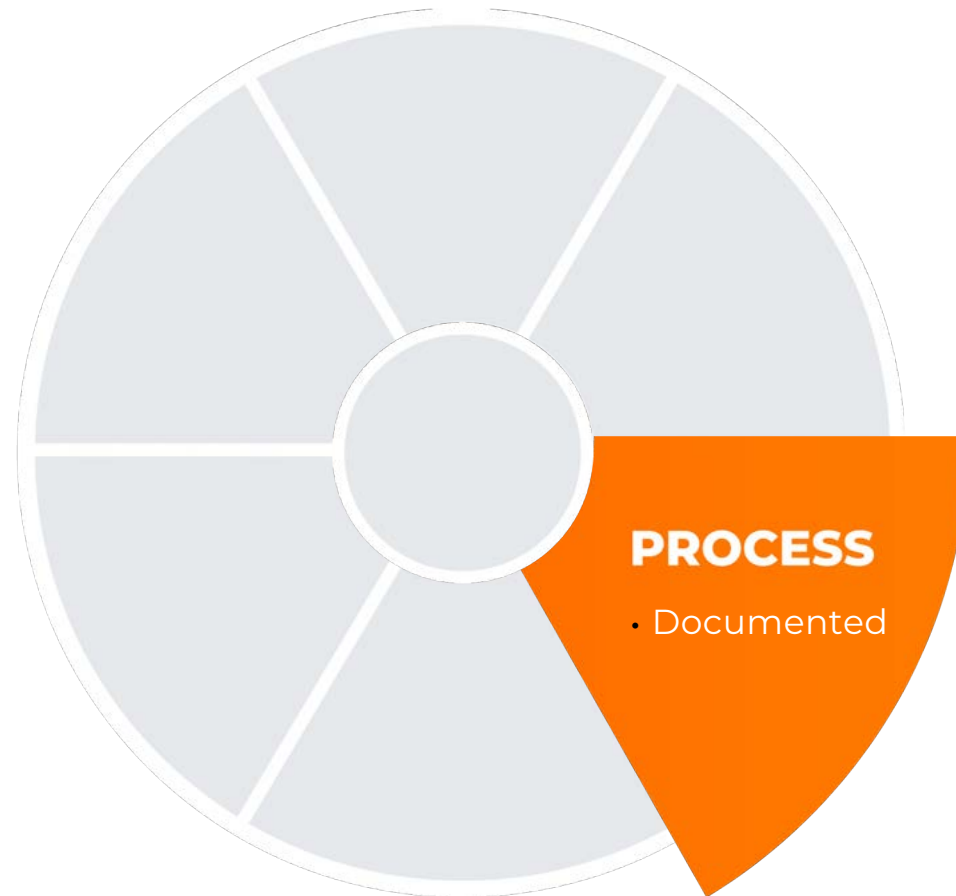
# THE EOS MODEL

**100% Strong**





# THE EOS MODEL





# HANDFUL OF CORE PROCESSES

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

# “YOUR COMPANY WAY”

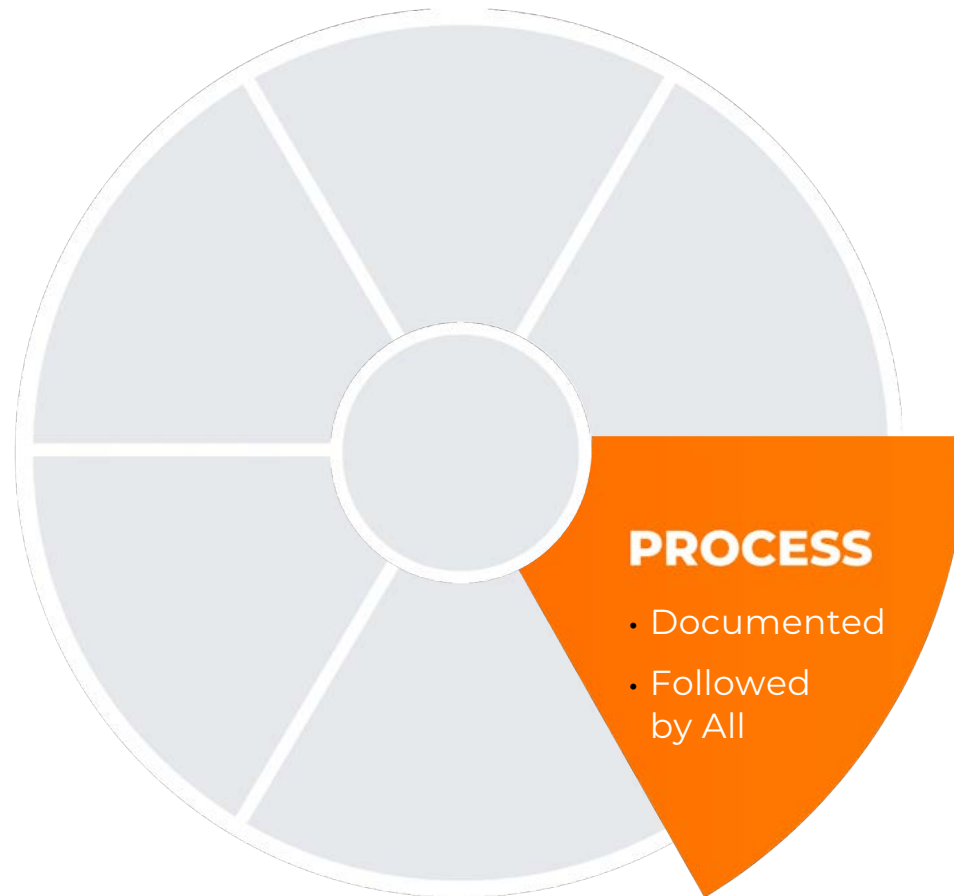
## Table of Contents

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

## People Process

- ID Need \_\_\_\_\_
- Define Seat \_\_\_\_\_  
\_\_\_\_\_
- Hiring \_\_\_\_\_
- On-Boarding/  
Training \_\_\_\_\_
- LMA \_\_\_\_\_  
\_\_\_\_\_
- Termination \_\_\_\_\_  
\_\_\_\_\_

# THE EOS MODEL





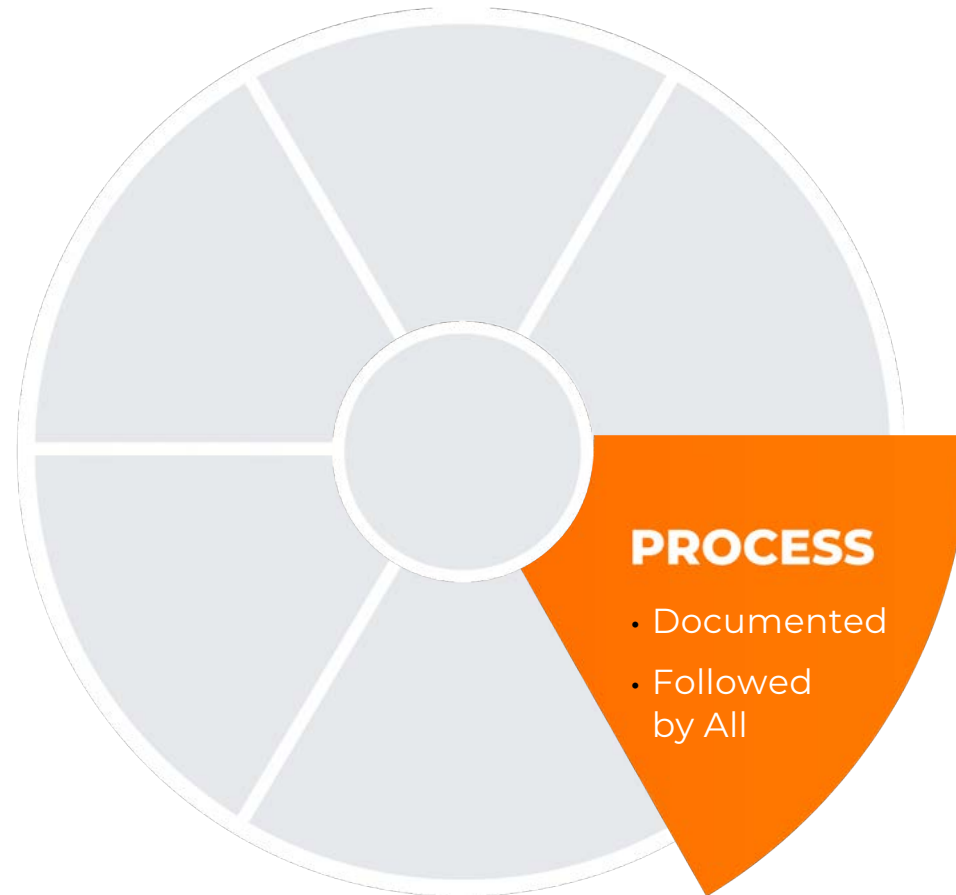
## **FBA CHECKLIST**

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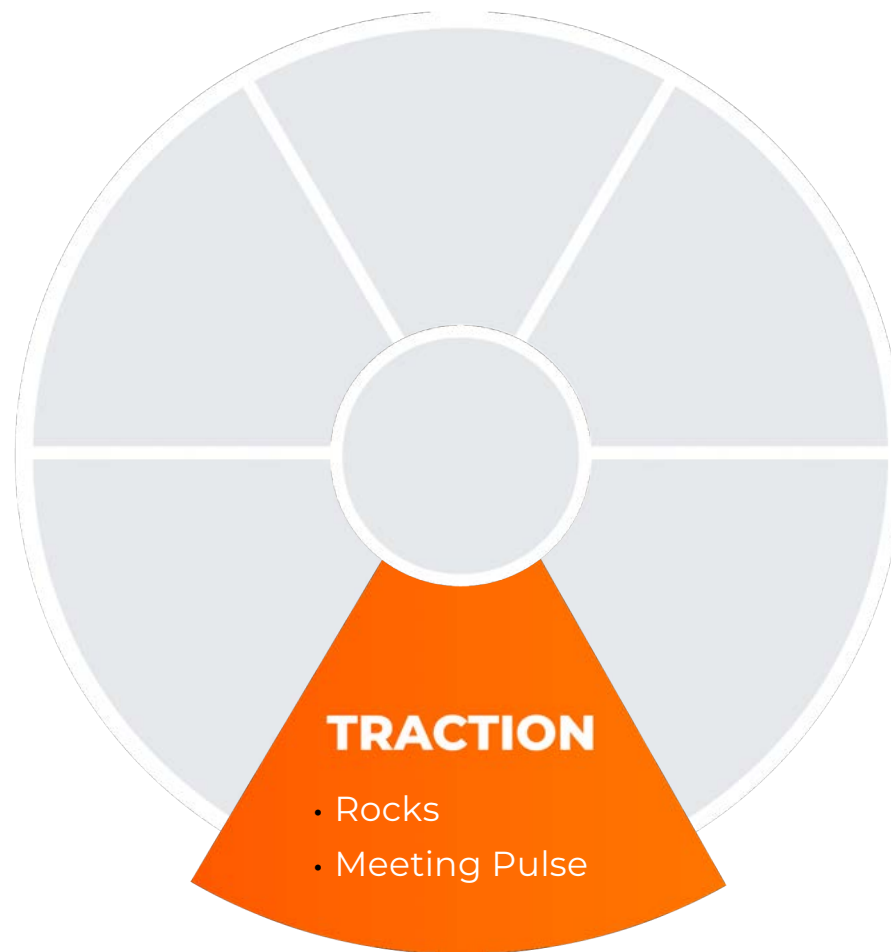
- Train
- Measure
- LMA
- Update

# THE EOS MODEL

**100% Strong**



# THE EOS MODEL







# MEETING PULSE™

---

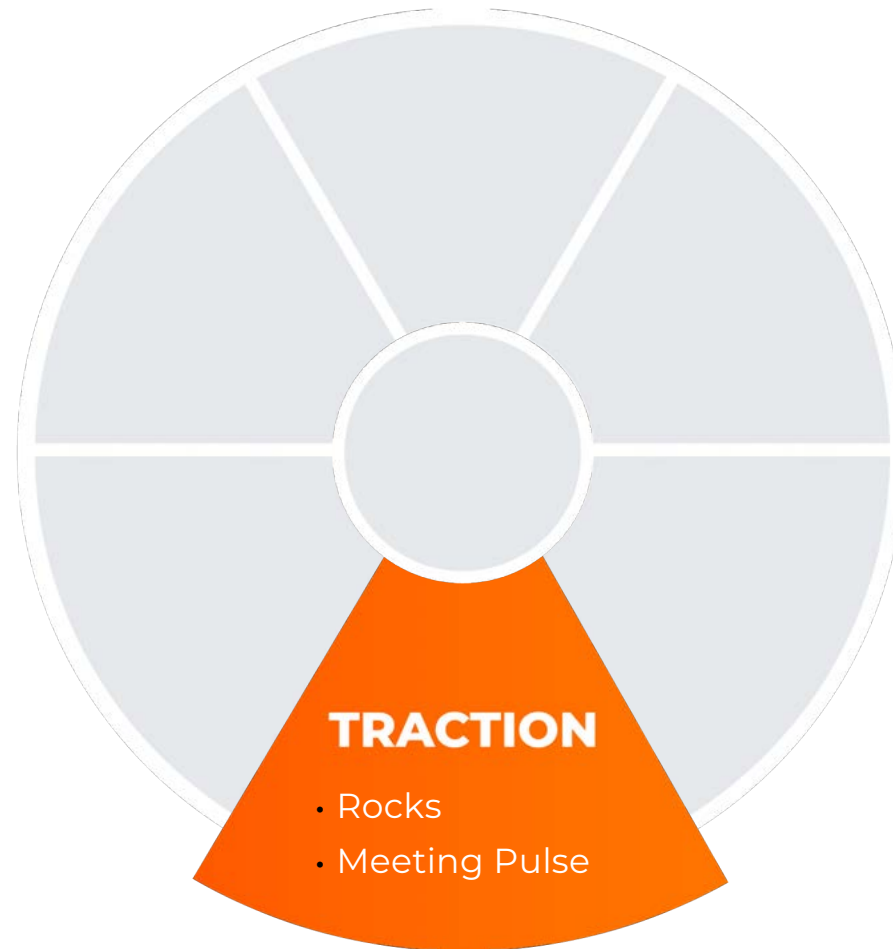
- 90-Day World™
- Meeting Pulse
  - Same Day
  - Same Time
  - Start on Time
  - End on Time
  - Same Agenda

# LEVEL 10 MEETING™

- Good News 5 Minutes
- Scorecard 5 Minutes
- Rock Review 5 Minutes
- Customer & Employee Headlines 5 Minutes
- To Do List 5 Minutes  
*Placeholder text for To Do List*
- Issues List/IDS 60 Minutes  
*Placeholder text for Issues List/IDS*
- Conclude 5 Minutes

# THE EOS MODEL

**100% Strong**



# THE EOS MODEL





# EOS FOUNDATIONAL TOOLS™

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



## RESOURCES

---

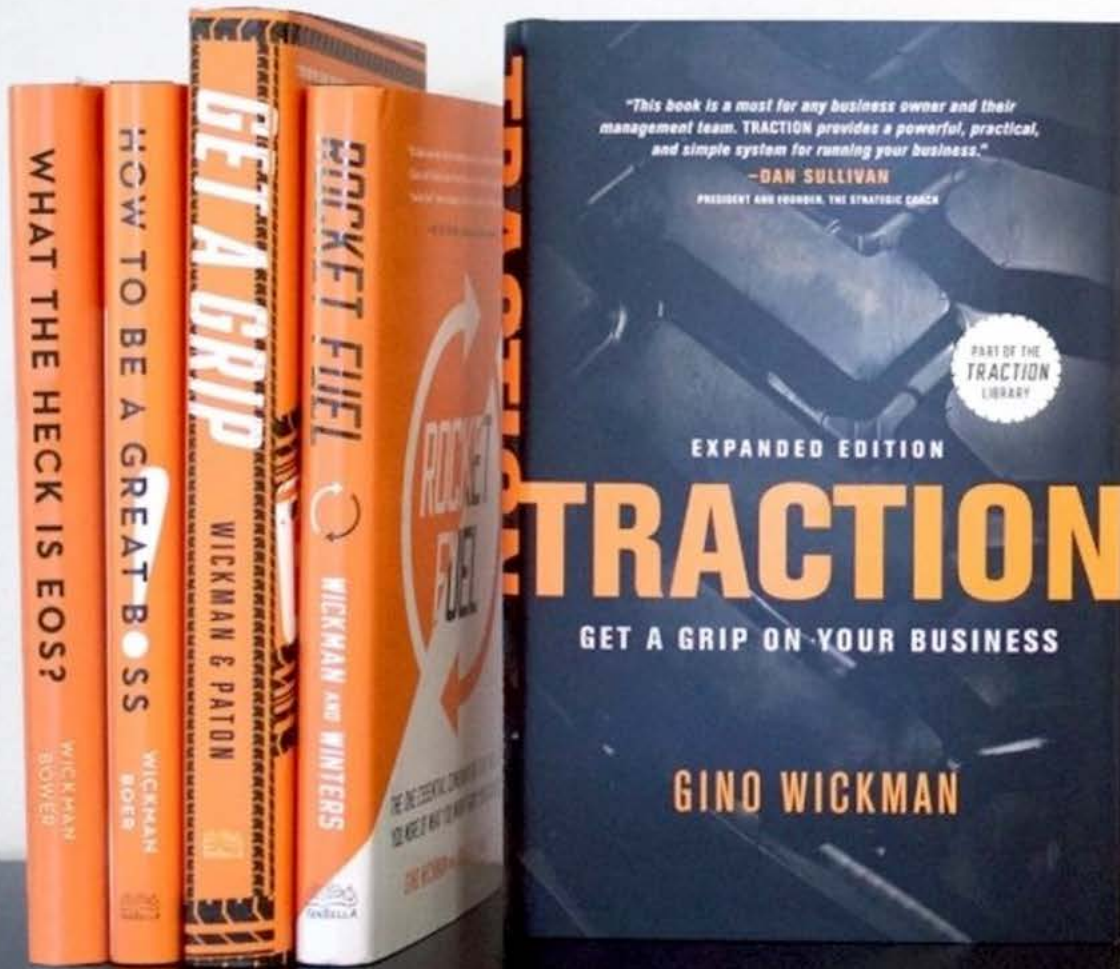
- [EOSWorldwide.com](https://EOSWorldwide.com)
  - Traction Library
  - Downloadable tools and videos
  - Base Camp
  - EOS Implementers





How do you  
feel now?



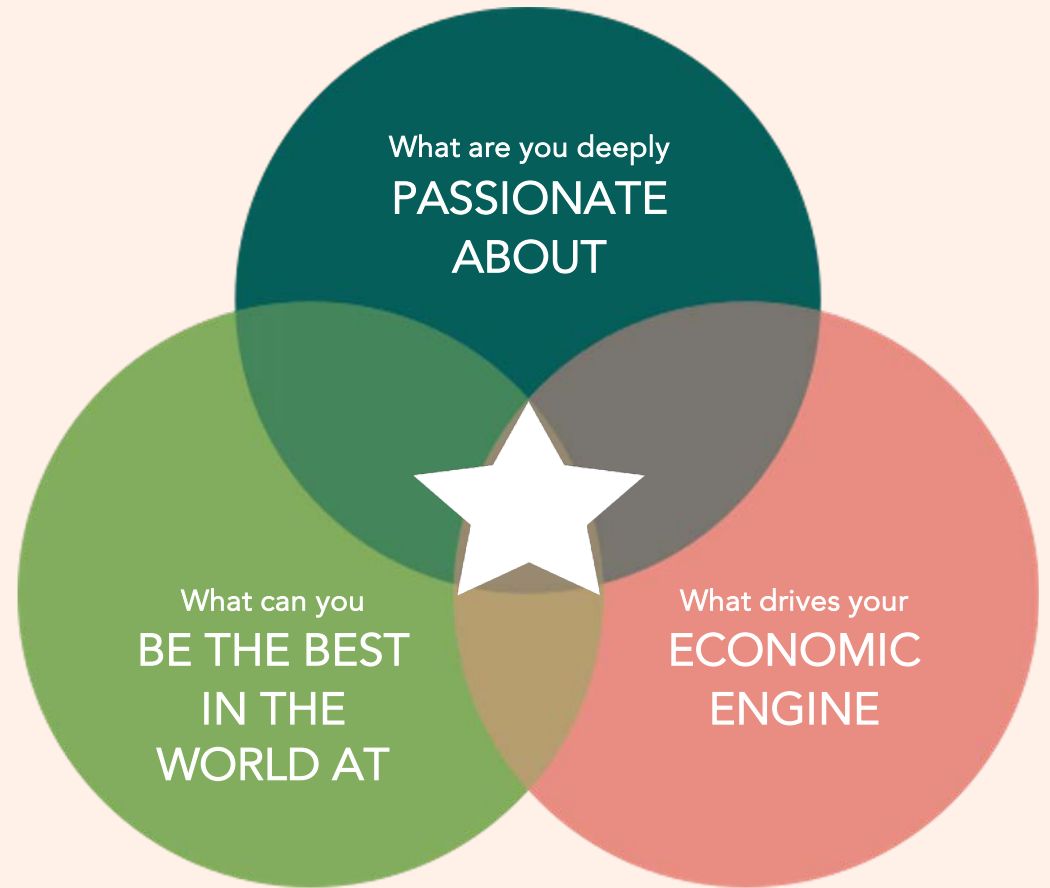


Is it possible to self-  
implement?

**Yes, and**

HEDGEHOG CONCEPT

# Good to Great





## VISION

“Steady hands make  
beautiful bouquet,  
steady minds make a  
**beautiful business**”

# Random Acts of...

Can we do  
it? Sure.

Should we  
do it?  
NO!

 **Core Values**



BE  
AWESOME







PEOPLE ANALYSER

# Right Person Right Seats

Your people are who create  
your culture and drive your  
business to success

**THE PEOPLE ANALYZER™**

| <b>NAME</b> | <i>Humbility</i> | <i>Trailblazing</i> | <i>Do the Right Thing</i> | <i>No Compromises</i> | <i>Bring It</i> | <i>Be Awesome</i> |  |  |  |  |  |
|-------------|------------------|---------------------|---------------------------|-----------------------|-----------------|-------------------|--|--|--|--|--|
| Rose        | +                | +                   | +                         | -                     | +               | +                 |  |  |  |  |  |
| Daisy       | -                | -                   | +/-                       | +                     | +               | -                 |  |  |  |  |  |
| Carnations  | +                | +                   | -                         | +                     | -               | -                 |  |  |  |  |  |
|             |                  |                     |                           |                       |                 |                   |  |  |  |  |  |
|             |                  |                     |                           |                       |                 |                   |  |  |  |  |  |
|             |                  |                     |                           |                       |                 |                   |  |  |  |  |  |
|             |                  |                     |                           |                       |                 |                   |  |  |  |  |  |
|             |                  |                     |                           |                       |                 |                   |  |  |  |  |  |
|             |                  |                     |                           |                       |                 |                   |  |  |  |  |  |
|             |                  |                     |                           |                       |                 |                   |  |  |  |  |  |
|             |                  |                     |                           |                       |                 |                   |  |  |  |  |  |
|             |                  |                     |                           |                       |                 |                   |  |  |  |  |  |
|             |                  |                     |                           |                       |                 |                   |  |  |  |  |  |
|             |                  |                     |                           |                       |                 |                   |  |  |  |  |  |
|             |                  |                     |                           |                       |                 |                   |  |  |  |  |  |

**THE BAR**

|                 |  |  |  |  |  |  |  |  |  |  |
|-----------------|--|--|--|--|--|--|--|--|--|--|
| RATING: + +/- - |  |  |  |  |  |  |  |  |  |  |
|-----------------|--|--|--|--|--|--|--|--|--|--|



Everybody needs a job,  
but do they want it?

# How to find the right people?



# 7 Personality Traits



# Categories & Labels

## Visionary

- Trailblazer
- Daredevil
- Enterpriser
- Philosopher
- Architect

## Research

- Technical Expert
- Scholar
- Specialist
- Craftsman

## Social

- Persuader
- Rainmaker
- Influencer
- Debator
- Socializer

## Organizational

- Administrator
- Coordinator
- Facilitator
- Operator
- Traditionalist

# Keywords for Job Listings

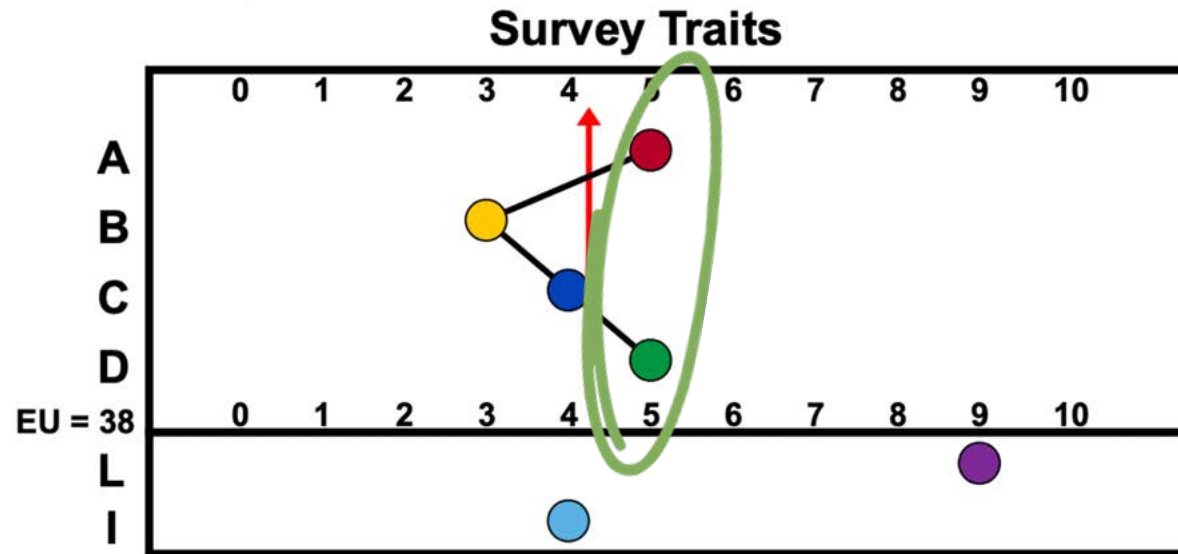
## Trailblazer



Innovative  
Take Charge  
Headstrong  
Independent  
Enthusiastic  
Optimistic  
Works Well With Pressure  
Quick  
Driven  
Good with delegating  
Uninhibited  
Dislikes Details

---

Technical Expert





Questions



Liza Roeser

THE FLOWER CEO



Can you see  
Clearly now?