Get MORE
Of What You Want
From Your Business

Transforming your company with

EOS®
Entrepreneurial Operating System®
Even the most successful entrepreneurs occasionally find running a business more challenging than they expected.

Many work longer hours and get less return on their investment of time and money than they would like.
Most entrepreneurs regularly grapple with one or more of the following challenges:

- **Lack of control** - over time, the market, or the company.
- **People** - don’t listen, understand or follow through.
- **Profit** - there’s not enough of it.
- **Growth** - is okay, but they just can’t seem to break through to the next level.
- **Magic Pills** - lots of remedies and quick fixes have come and gone, but the wheels are still spinning.

GET A GRIP ON YOUR BUSINESS
If these problems seem all too familiar, you’re not alone.

It doesn’t have to be that way.

In this presentation, Ken will introduce you to the **Six Key Components™** of a **successful business**.

He’ll arm you with a set of **simple, practical tools** you and your leadership team can begin using **right away** to get better results.
THE BIG IDEA IN 178 WORDS

We understand that as an entrepreneurial business owner, you’re dealing with a variety of complex issues. All those issues could be boiled down to probably a handful:

- Lack of control – over time, the market or company
- People - they don’t listen, follow through or hold themselves accountable
- Profit - simply put, there isn’t enough
- Growth – feeling stuck, you’re hitting the ceiling

The reality is, if you can focus on the 6 key components of your business, you’ll solve your issues, be in more control and increase profitability. We are fundamentally committed to this point of view. And companies that strengthen the 6 key components grow 18% annually.

**EOS** provides a comprehensive way of running your business so you can strengthen each component using simple, practical tools that produce the **results** you want. Successful entrepreneurial business owners focus exclusively on their core business. People who stay focused succeed. It’s that simple.

In this presentation, I’m going to introduce you to the 6 key components and the specific tools and disciplines you’ll use that will put you back in control of your business!
AGENDA

About Us

About You

The Tools

The Process

IS THERE A FIT?
EOS STATS

Over 665 Companies running on EOS

Over 4,065 full day sessions delivered

Over 10,000 hours of working with entrepreneurs and their leadership teams
MY BACKGROUND

Kenneth C. DeWitt
Business Coach and
Certified EOS Implementer

Ellis Architects

Collateral Benefits Group

GORRIE & REGAN

alden

PACE

HONIRON

Southland Benefit Solutions

Spiller Furniture

HPA

Health Partners America

VISION

Security Technologies

DeWitt LLC
MY STORY

Had partnerships in six businesses

Founded two very successful CPA firms

Merged with a large national firm

Became a fractional CFO, including for TekLinks of Birmingham

Set out to invent a system that could be used to create successful businesses in any industry

Joined with EOS Worldwide / Traction
TODAY

Full-time Certified EOS Implementer
AGENDA

About Us

About You

The Tools

The Process

YOUR STORY
ABOUT YOU
A clear picture of where things are

Brief history
Revenue
Employees
Type of business
#1 Business goal / what do you want?
3 biggest challenges / 2 a.m. thoughts
3 greatest strengths
Meeting effectiveness (1-10)
Organizational alignment around plan (1-10)
Organizational accountability (1-10)
AGENDA

About Us

About You

The Tools

The Process
Begin at the end to illustrate what it looks like at the end of the journey.

A discovery

136 ISSUES - LOTS TO MANAGE
DISCOVERY: STRENGTHEN 6 KEY COMPONENTS
EVERYTHING FALLS INTO PLACE
One quick pass to introduce the Six Key Components.

Second pass to go into more detail.
100% ON THE SAME PAGE WITH WHERE YOU ARE GOING AND HOW YOU WILL GET THERE
YOU CAN'T ACHIEVE A GREAT VISION WITHOUT GREAT PEOPLE
CLEAR VISION + GREAT PEOPLE + DATA = TRANSPARENCY

Cut through politics, egos & feelings
Open & honest

YOUR BUSINESS

VISION
PEOPLE
DATA

OBJECTIVE MEASURABLES VS. SUBJECTIVE

DeWitt LLC
Success is in direct proportion to your ability to solve your own issues.

Set them up, knock them down

VISION
PEOPLE
ISSUES
DATA
YOUR BUSINESS

SOLVING YOUR PROBLEMS AS THEY SURFACE

DeWitt LLC
The secret ingredient in business often neglected

- Vision
- People
- Data
- Issues
- Process

- More consistent
- Scalable
- Easier to manage
- More efficient
- More fun
- More profitable

Your Business

The secret ingredient in business often neglected

DeWitt LLC
Environment of accountability & discipline = solid execution
WHEN ALL 6 COMPONENTS ARE STRONG
EVERYTHING FALLS INTO PLACE

Most organizations are operating at 20 – 40%.

Aim for 100% Utopia

Goal is 80+% attainable

VISION

DATA

PROCESS

TRACTION

ISSUES

PEOPLE

YOUR BUSINESS

THE EOS MODEL™
So how do **YOU** get there?

How do companies get to 80+%?
100 PAGE STRATEGIC PLANS?
SIMPLER APPROACH, 8 QUESTIONS: THE VT/O

Getting the leadership team 100% on the same page.

THE EOS MODEL™
THE V/TO:
Vision/Traction organizer
WHAT ARE CORE VALUES?

Guiding principles that define your culture.

• Guide business processes
• Clarify who we are
• Articulate what we stand for
• Help explain why we do business the way we do
• Guide us on how to teach
• Inform us on how to reward
• Guide us in making decisions
• Underpin the whole organization
• Require no external justification
There are significant benefits that come from a vibrant and alive culture:

- **Focus**: Aligns the entire company towards achieving its vision, mission, and goals
- **Motivation**: Builds higher employee motivation and loyalty
- **Connection**: Builds team cohesiveness among the company’s various departments and divisions
- **Cohesion**: Builds consistency and encourages coordination and control within the company
- **Spirit**: Shapes employee behavior at work, enabling the organization to be more efficient and alive
“Compromise anything but your core values.”

Howard Schultz,
CEO of Starbucks
# THE VISION/TRACTION ORGANIZER™

**ORGANIZATION NAME:**

## VISION

### CORE VALUES

Guiding principals that define your culture *(Built To Last)*

- Hire, fire, review, recognize, reward
- They attract people to your organization
- Employees love being around each other

Process to discover your 3 - 7 core values

### CORE FOCUS™

**Purpose/Cause/Passion:**

**Our Niche:**

### 10 YEAR TARGET™

**Target Market/“The List”:**

Three Uniques:
1.
2.
3.

**Proven Process:**

**Guarantee:**

### MARKETING STRATEGY
# THE VISION/TRACTION ORGANIZER™

**ORGANIZATION NAME:**

**VISION**

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## CORE FOCUS

**Purpose/Cause/Passion:**

**Our Niche:**

**10 YEAR TARGET™**

**MARKETING STRATEGY**

**Target Market/“The List”:**

**Three Uniques:** 1.

**Proven Process:**

**Guarantee:**

**CORE FOCUS**

- Mission statement, hedgehog concept, voice, unique ability
- 100% on the same page with core focus
- Focuses entire organization
- Avoiding distractions - a filter
# THE VISION/TRACTION ORGANIZER™

**ORGANIZATION NAME:**

## VISION

| CORE VALUES | 1.  
| 2.  
| 3.  
| 4.  
| 5.  |

### CORE FOCUS™

- **Purpose/Cause/Passion:**

- **Our Niche:**

### 10 YEAR TARGET™

- **Target Market/"The List":**

- **Three Uniques:**
  1.  
  2.  
  3.  

- **Proven Process:**

- **Guarantee:**

### MARKETING STRATEGY

#### 10-YEAR TARGET

**Big, wonderful, energizing goal**

5 to 30 years

**Whole organization will act differently**
### THE VISION/TRACTION ORGANIZER™

**ORGANIZATION NAME:**

#### VISION

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<td>What Does It Look Like?</td>
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#### MARKETING STRATEGY

**Strategy before plan**

1. your audience
2. what 3 things set you apart
3. your proven way – on 1 page
4. what is your promise

**More customers - higher margins**

1. **Target Market/"The List":**
2. **Three Uniques:**
   1.  
   2.  
   3.  
3. **Proven Process:**
4. **Guarantee:**
THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME:

VISION

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## 1 YEAR PLAN

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### Goals for the Year

1. 
2. 
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6. 
7. 

### Rocks for the Quarter

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### Who

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### 1-YEAR PLAN

- Bringing it down to the ground
- What must get done
- 3 - 7 lead dominos - less is more

## ISSUES LIST

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**ROCKS**

What must get done in 90 days
3 - 7 lead dominos - laser focus
90 day world (human limits)
Maintains focus
THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME:

TRACTION

1 YEAR PLAN

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ISSUES LIST

Obstacles, barriers
Open, honest
On this list
How to solve later

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The EOS Model™
That’s our V/TO
CORE VALUES

Your filter to hire, fire, review, recognize, and reward

It's important that departments and individuals are motivated and measured against the way they model the values.

If you want a values-driven culture, hire people using the values as a filter.
EVERYONE ROWING IN ONE DIRECTION = GETTING THERE FASTER

Leadership team on the same page first, then the rest of the organization.

EVERYONE ROWING IN ONE DIRECTION = GETTING THERE FASTER

THE EOS MODEL™
Cut through all the jargon: “A-players”, “superstars”, “winners”.

MUST HAVE THE RIGHT PEOPLE IN THE RIGHT SEATS
RIGHT PEOPLE POSSESS YOUR CORE VALUES
SEAT MATCHES PERSON’S SKILL SET ON THE ACCOUNTABILITY CHART

VISION
- 8 Questions
- Shared By All

PEOPLE
- Right People
- Right Seats

DATA

ISSUES

PROCESS

TRACTION

YOUR BUSINESS
THE ACCOUNTABILITY CHART

Generic structure
ONLY 5 MAJOR FUNCTIONS

STEP 1 - DEFINING THE RIGHT STRUCTURE/SEATS
WHAT ARE THE MAJOR FUNCTIONS OF YOUR BUSINESS?
THE ACCOUNTABILITY CHART

STEP 1 - DEFINING THE RIGHT STRUCTURE/SEATS
WHAT ARE THE MAJOR FUNCTIONS OF YOUR BUSINESS

Textbook leadership team structure
THE ACCOUNTABILITY CHART

STEP 2 - CLARIFY ROLES & RESPONSIBILITIES FOR EVERY SEAT
Build teams for each major function.

STEP 3 - D&E THE RIGHT PERSON INTO EACH SEAT
BASED UPON CORE VALUES ALIGNMENT & UNIQUE ABILITY
# The People Analyzer

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# The Scorecard

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**13 WEEKS AT A GLANCE**

**EVERYONE HAS A NUMBER**
VISION
- 8 Questions
- Shared By All

PEOPLE
- Right People
- Right Seats

DATA
- Scorecard
- Measurables

ISSUES

PROCESS

TRACTION

YOUR BUSINESS

OPEN AND HONEST ENVIRONMENT
THE EOS MODEL™

VISION
- 8 Questions
- Shared By All

PEOPLE
- Right People
- Right Seats

DATA
- Scorecard
- Measurables

YOUR BUSINESS

ISSUES
- Issues List

PROCESS

TRACTION

OPEN AND HONEST ENVIRONMENT
THE EOS MODEL™

VISION
- 8 Questions
- Shared By All

PEOPLE
- Right People
- Right Seats

DATA
- Scorecard
- Measurables

PROCESS

ISSUES
- Issues List
- IDS

TRACTION

YOUR BUSINESS

THE ISSUES SOLVING TRACK

Identify
Discuss
Solve
6-10 CORE PROCESSES
THE 20/80 RULE -- YOUR WAY
THE EOS MODEL™

- VISION
  - 8 Questions
  - Shared By All

- PEOPLE
  - Right People
  - Right Seats

- ISSUES
  - Issues List
  - IDS

- DATA
  - Scorecard
  - Measurables

- PROCESS
  - Documented
  - Followed By All

- TRACTION

YOUR BUSINESS

THE RESULTS YOU WANT CONSISTENTLY
EVERYONE HAS A ROCK
A 90-DAY WORLD

THE EOS MODEL™

VISION
- 8 Questions
- Shared By All

PEOPLE
- Right People
- Right Seats

DATA
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- Measurables

ISSUES
- Issues List
- IDS

PROCESS
- Documented
- Followed By All

TRACTION
- Rocks

YOUR BUSINESS

- Rocks
CREATING A PULSE

THE EOS MODEL™

YOUR BUSINESS

VISION
- 8 Questions
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ISSUES
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PROCESS
- Documented
- Followed By All

TRACTION
- Rocks
- Meeting Pulse

CREATING A PULSE
# THE LEVEL 10 MEETING™

**Agenda:**

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<td>Scorecard</td>
<td>5 Minutes</td>
</tr>
<tr>
<td>Rock review</td>
<td>5 Minutes</td>
</tr>
<tr>
<td>Customer/employee headlines</td>
<td>5 Minutes</td>
</tr>
<tr>
<td>To-Do List</td>
<td>5 Minutes</td>
</tr>
<tr>
<td>IDS</td>
<td>60 Minutes</td>
</tr>
<tr>
<td>Conclude</td>
<td>5 Minutes</td>
</tr>
<tr>
<td>Recap To-Do List</td>
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<tr>
<td>Cascading messages</td>
<td></td>
</tr>
<tr>
<td>Rating (1-10)</td>
<td></td>
</tr>
</tbody>
</table>

COMMUNICATION, DISCIPLINE & EXECUTION
THE EOS MODEL™

VISION
- 8 Questions
- Shared By All

PEOPLE
- Right People
- Right Seats

DATA
- Scorecard
- Measurables

ISSUES
- Issues List
- IDS

PROCESS
- Documented
- Followed By All

TRACTION
- Rocks
- Meetings

YOUR BUSINESS

Aim for 100% Utopia

Goal is 80+% Attainable

RESULT: A GREAT ORGANIZATION

DeWitt LLC
AGENDA

About Us

About You

The Tools

The Process

HOW DO WE GET THERE?
THE PROCESS

24 Months

ADVANCE ONE STEP AT A TIME
EVERY SESSION IS GUARANTEED
What were business owners thinking when they started implementing EOS?

Q. Please reflect back to the moment you made the decision to implement EOS in your business. What were your thoughts or feelings behind taking that step? Was it one or more of these?

- 82.4% I wasn’t getting enough out of my people. We weren’t all on the same page, working together to win.
- 35.3% I was stuck. My business had flat-lined and I couldn’t figure out how to keep us growing.
- 29% We felt that everything we did was by brute force. We were working extremely hard but couldn’t seem to break through the “glass ceiling.”
- 23.5% There wasn’t enough profit to make it worth the time and energy I was investing in the business.
- 17.6% I felt like a prisoner to my business - it had more control of me than me having control of it. It wasn’t fun anymore.
WHERE DO WE GO FROM HERE?

REAL. SIMPLE. RESULTS.