

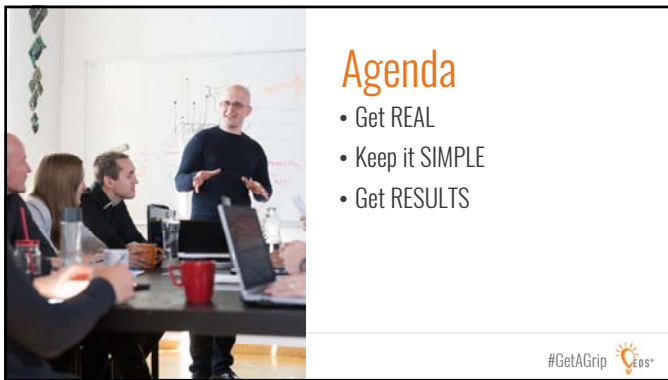
Concurrent Session

Are you Running your Organization or is it Running you?

Curt Swindoll, President, Current Strategies
Professional EOS Implementer



1



2



3



Get REAL

- You
- Me
 - Brief History
 - Discoveries

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4



Frustrations

- Who is Running Who
- Revenue
- People
- Hitting the Ceiling
- Nothing's Working

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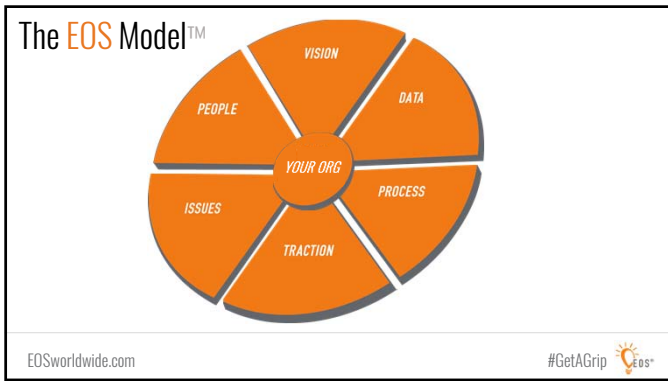
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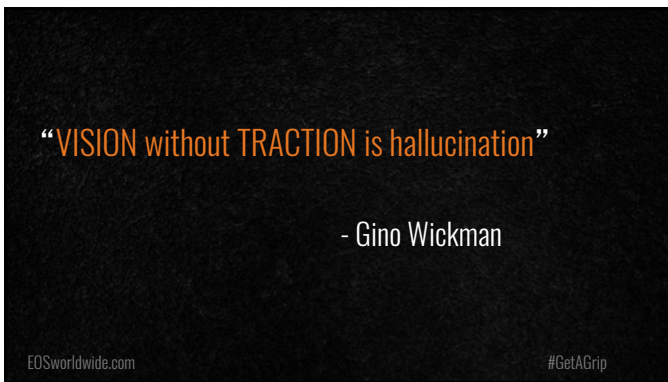
Keep it SIMPLE

#GetAGrip

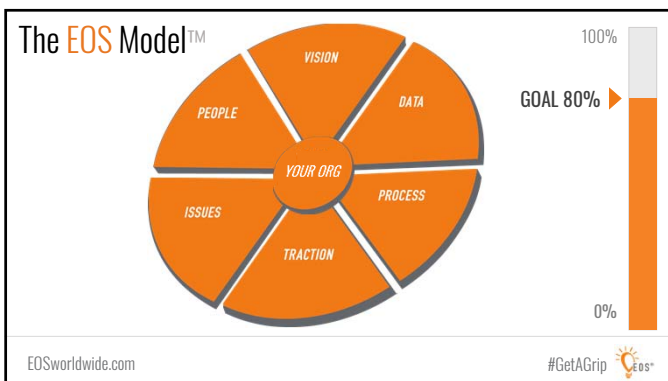
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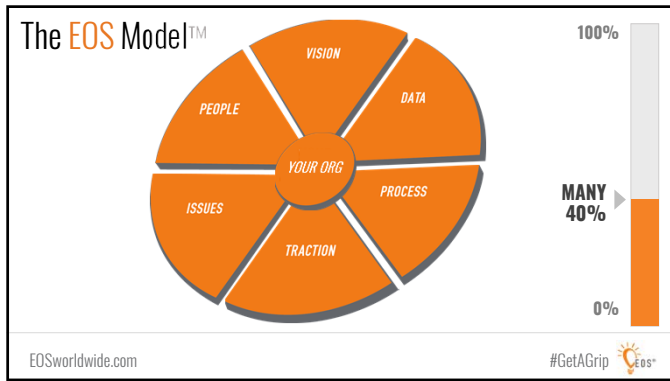
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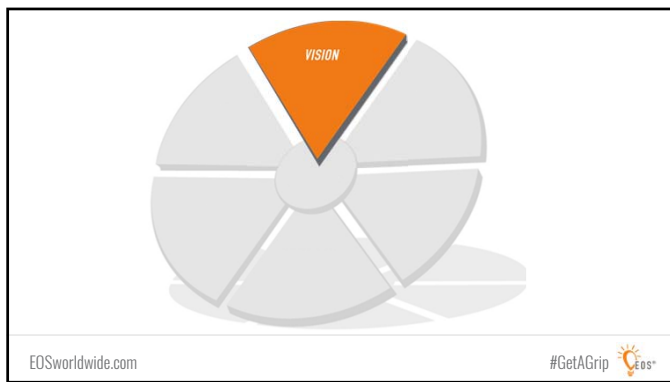
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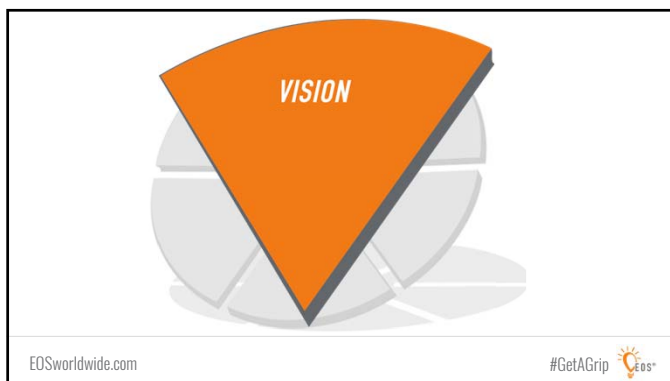
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10



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12

The Vision/Traction Organizer™

CORE VALUES	1.	3-YEAR PICTURE™
	2.	
3.		
4.		
5.		
CORE FOCUS™	Reason/Cause/Passion	Future Date Revenue Profit Headcount What Does It Look Like?
	Big Vision	
10-YEAR TARGET™		
MARKETING STRATEGY	Target Market/The List:	
	3 Strategies:	
	Primary Process	
	Secondary	

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V/TO™

1-YEAR PLAN	ROCKS	ISSUES LIST																																			
Future date Revenue Profit Headcount Goals for the Year	Future date Revenue Profit Headcount Rocks for the Quarter	1. 2. 3. 4. 5. 6. 7. 8. 9. 10.																																			
<table border="1"> <tr><td>1.</td><td></td></tr> <tr><td>2.</td><td></td></tr> <tr><td>3.</td><td></td></tr> <tr><td>4.</td><td></td></tr> <tr><td>5.</td><td></td></tr> <tr><td>6.</td><td></td></tr> <tr><td>7.</td><td></td></tr> </table>	1.		2.		3.		4.		5.		6.		7.		<table border="1"> <tr><td>1.</td><td></td><td>Who</td></tr> <tr><td>2.</td><td></td><td></td></tr> <tr><td>3.</td><td></td><td></td></tr> <tr><td>4.</td><td></td><td></td></tr> <tr><td>5.</td><td></td><td></td></tr> <tr><td>6.</td><td></td><td></td></tr> <tr><td>7.</td><td></td><td></td></tr> </table>	1.		Who	2.			3.			4.			5.			6.			7.			Priorities • Identify • Remove • Solve
1.																																					
2.																																					
3.																																					
4.																																					
5.																																					
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7.																																					
1.		Who																																			
2.																																					
3.																																					
4.																																					
5.																																					
6.																																					
7.																																					

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V/TO

CORE VALUES	1.	3-YEAR PICTURE™
	2.	
3.		
4.		
5.		
CORE FOCUS™	Reason/Cause/Passion	Future Date Revenue Profit Headcount What Does It Look Like?
	Big Vision	
10-YEAR TARGET™		
MARKETING STRATEGY	Target Market/The List:	
	3 Strategies:	
	Primary Process	
	Secondary	

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V/TO

CORE FOCUS™	Purpose/Cause/Passion:	
	Our Niche:	
MARKETING STRATEGY	1	3-YEAR PICTURE™
	2	
	3	
	4	
10-YEAR TARGET™ Our Vision:		3 Uniques™: 1. 2. 3. Proven Process: Guarantee:
WE-YOU TABLED Our Mission:		
5-YEAR TARGET™ Our Vision:		
10-YEAR TARGET™ Our Vision:		

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V/TO

CORE VALUES	1	3-YEAR PICTURE™
	2	
	3	
	4	
10-YEAR TARGET™	Our Vision:	
MARKETING STRATEGY	1	3-YEAR PICTURE™
	2	
	3	
	4	
10-YEAR TARGET™ Our Vision:		3 Uniques™: 1. 2. 3. Proven Process: Guarantee:
WE-YOU TABLED Our Mission:		
5-YEAR TARGET™ Our Vision:		
10-YEAR TARGET™ Our Vision:		

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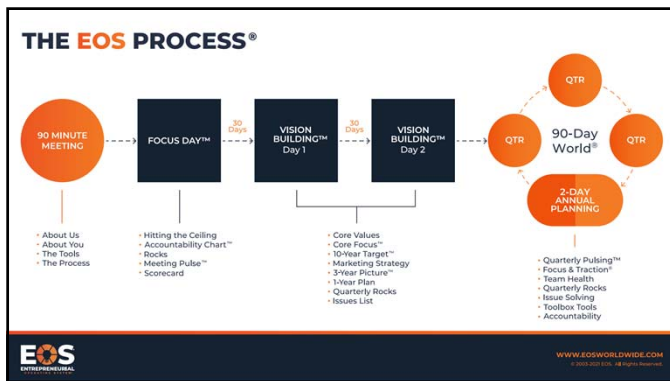
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V/TO

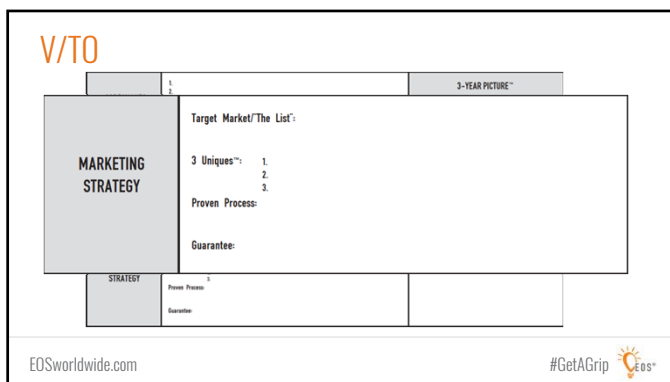
CORE VALUES	1	3-YEAR PICTURE™
	2	
	3	
	4	
10-YEAR TARGET™	Our Vision:	
MARKETING STRATEGY	1	3-YEAR PICTURE™
	2	
	3	
	4	
10-YEAR TARGET™ Our Vision:		3 Uniques™: 1. 2. 3. Proven Process: Guarantee:
WE-YOU TABLED Our Mission:		
5-YEAR TARGET™ Our Vision:		
10-YEAR TARGET™ Our Vision:		

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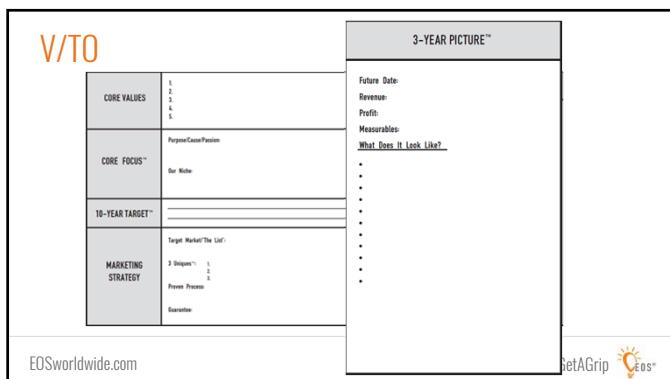
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V/TO

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. Practice: • Identify • Diagnose • Solve

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V/TO

1-YEAR PLAN	ISSUES LIST
Future date: Revenue: Profit: Measurables: Goals for the Year: 1. 2. 3. 4. 5. 6. 7.	1. 2. 3. 4. 5. 6. 7. 8. 9. 10. Practice: • Identify • Diagnose • Solve

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V/TO

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. Practice: • Identify • Diagnose • Solve

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V/TO

1-YEAR PLAN		ROCKS	
Future date		Future date	
Review		Review	
Goals		Goals	
Measurable		Measurable	
Goals for the Year		Rocks for the Quarter	
1.		1.	
2.		2.	
3.		3.	
4.		4.	
5.		5.	
6.		6.	
7.		7.	

ISSUES LIST

1.	
2.	
3.	
4.	
5.	
6.	
7.	
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10.	

Prioritize
 • Identify
 • Discuss
 • Solve

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100% STRONG

VISION
- 8 Questions

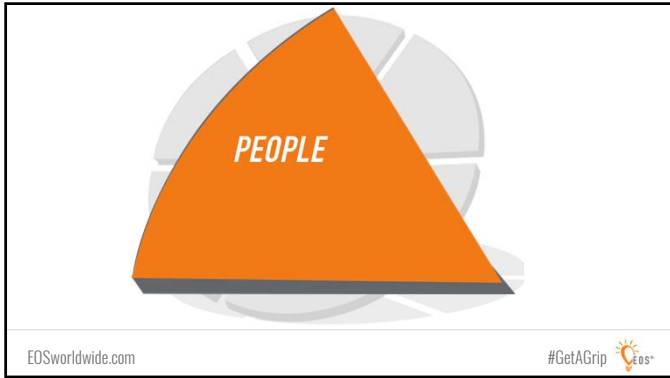
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PEOPLE

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The People Analyzer™

Name	Humbly confident	Grow or die	Help first	Do the right thing	Do what you say		
JoAnn Wright	+	+	+	+	+		
Martin Gilbert	-	+/-	-	-	+/-		
Ellen Smith	+/-	+/-	+	+/-	+		
The Bar	+	+/-	+	+/-	+		

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“Structure First, People Second”

- Gino Wickman

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The Accountability Chart

```
graph TD;
    A[INTEGRATOR] --- B[SALES & MARKETING / REVENUE];
    A --- C[OPERATIONS / PROGRAMS];
    A --- D[FINANCE / ADMINISTRATION];
```

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Right SEATS

Function
Name
• Role
• Role
• Role
• Role
• Role

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Right SEATS

Revenue/Fundraising

Name

- LMA
- Marketing/awareness
- Establish key relationships
- Hit revenue numbers
- Portfolio management

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Right SEATS

Linebacker

Name

- Gets It
- Wants It
- Capacity to Do It

- Cover the flats
- Block passes
- Blitz quarterbacks
- Tackle ball carriers
- Maximize turnovers

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The People Analyzer™

Name

	Handle criticism	Grow or die	Help first	Do the right thing	Do what you say	Get it	Want it	Capacity
Leighton Vander Esch	+	+	+	+	+	Y	Y	Y
Micah Parsons (Rookie)	-	+/-	-	-	+/-	Y	Y	N
Bobby Carpenter						N	Y	Y
The Bar						Y	Y	Y

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Right SEATS

Function

Name

- Role
- Role
- Role
- Role
- Role

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Right SEATS

```
graph TD; Visionary[Visionary] --- Managerial[Managerial]; Visionary --- Marketing[Marketing]; Visionary --- Sales[Sales]; Visionary --- Operations[Operations]; Visionary --- Finance[Finance]; Managerial --- Marketing; Managerial --- Sales; Managerial --- Operations; Managerial --- Finance; Marketing --- MarketingManager[Marketing Manager]; Marketing --- MarketingSpecialist[Marketing Specialist]; Marketing --- MarketingAssistant[Marketing Assistant]; Sales --- SalesManager[Sales Manager]; Sales --- SalesRepresentative[Sales Representative]; Sales --- SalesAssistant[Sales Assistant]; Operations --- OperationsManager[Operations Manager]; Operations --- OperationsSpecialist[Operations Specialist]; Operations --- OperationsAssistant[Operations Assistant]; Finance --- FinanceManager[Finance Manager]; Finance --- FinanceSpecialist[Finance Specialist]; Finance --- FinanceAssistant[Finance Assistant];
```

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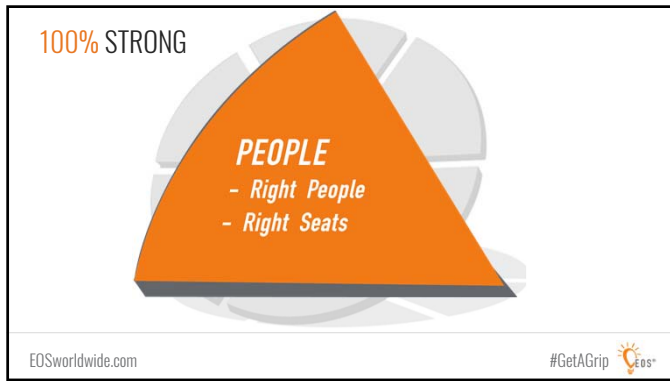
Two Kinds of PEOPLE ISSUES

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

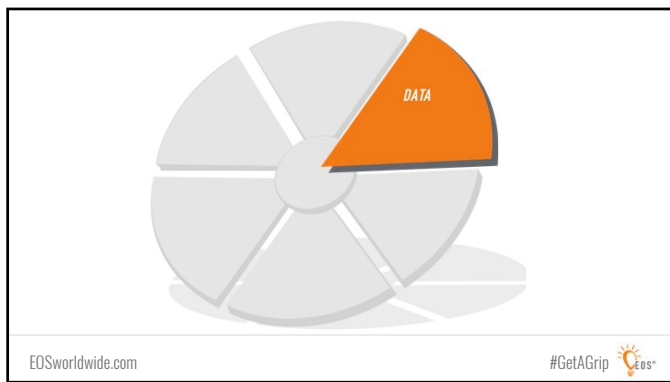
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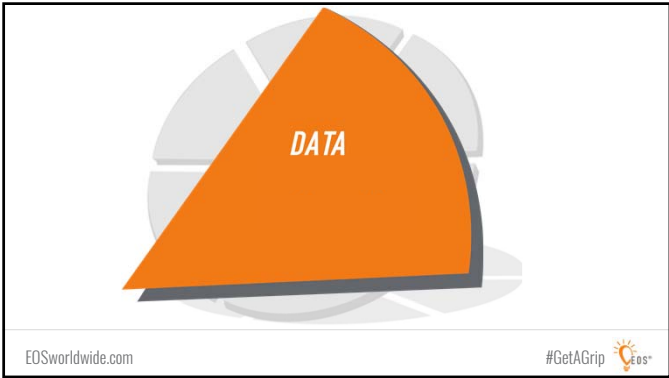
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**"If we have data, let's look at the data.
If all we have are opinions, let's go with mine."**

- Jim Barksdale, former Netscape CEO

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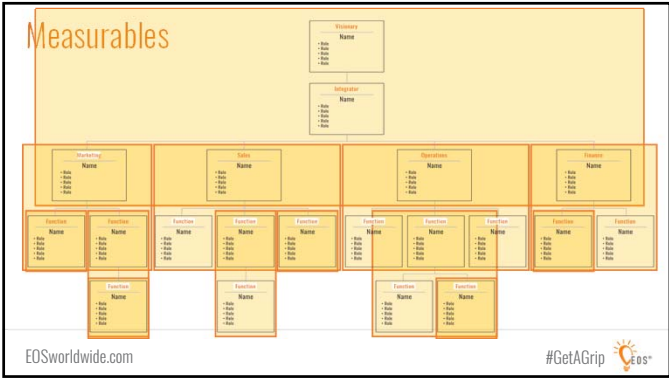
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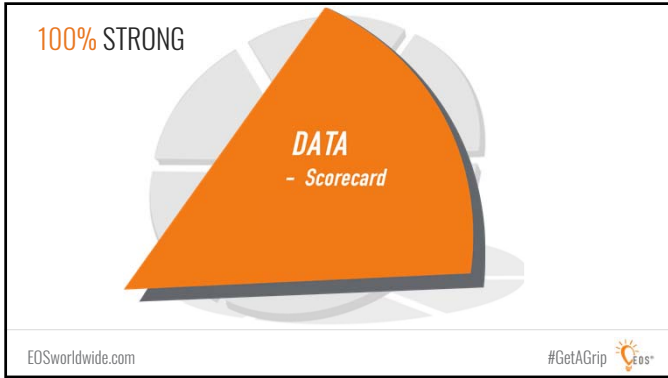
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Organization SCORECARD															
WHO	MEASURABLES	GOAL	30-Sep	7-Oct	14-Oct	21-Oct	28-Oct	4-Nov	11-Nov	18-Nov	25-Nov	2-Dec	9-Dec	16-Dec	23-Dec
Anne	Weekly Giving	>=\$84,500	\$92,000	\$85,238	\$81,200	\$80,934	\$88,678	\$88,200	\$85,321	\$80,282	\$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	Relationship Calls	50	54	55	61	59	32	48	51	72	61	54	50	52	54
Robert	Client Meetings	10	10	10	10	8	10	10	12	11	15	10	9	8	8
Robert	Proposals	5	5	5	6	5	6	5	6	4	5	8	6	5	5
Frank	Client Complaints	<=2	2	3	6	3	2	3	5	3	2	1	2	8	4
Jenn	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
John	Billable Hours	>=300	320	250	375	305	295	310	305	325	300	315	320	300	260
John	Utilization/Capacity	>75%	75%	76%	75%	75%	75%	75%	75%	82%	75%	75%	78%	75%	75%

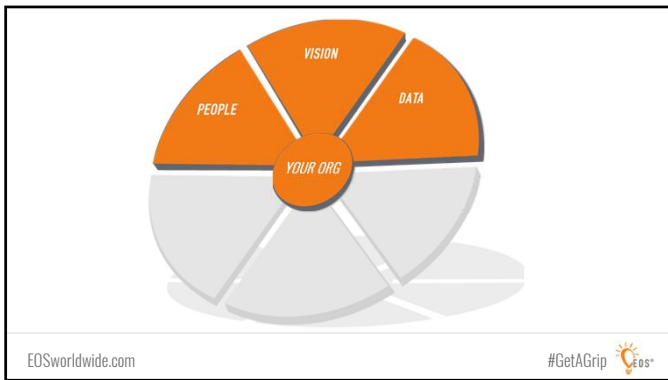
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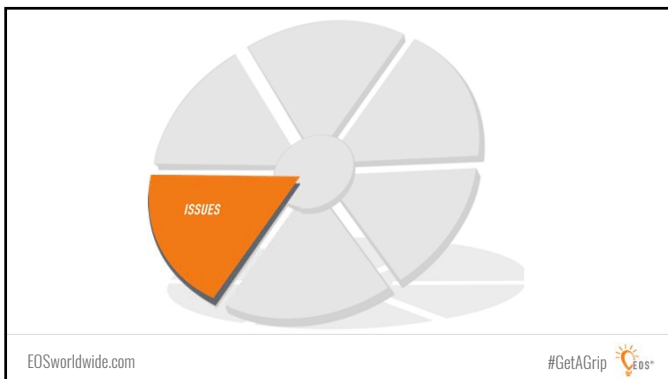
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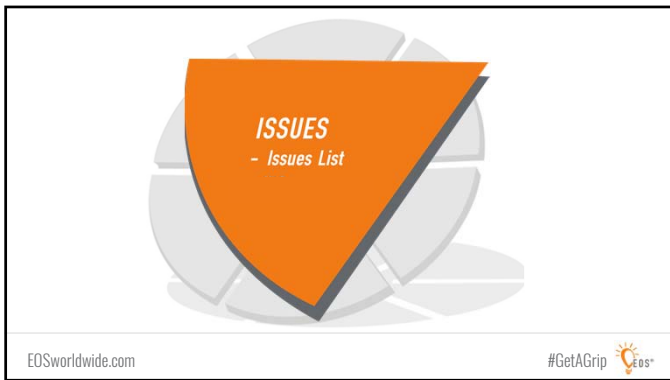
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Issues Solving Track

Identify

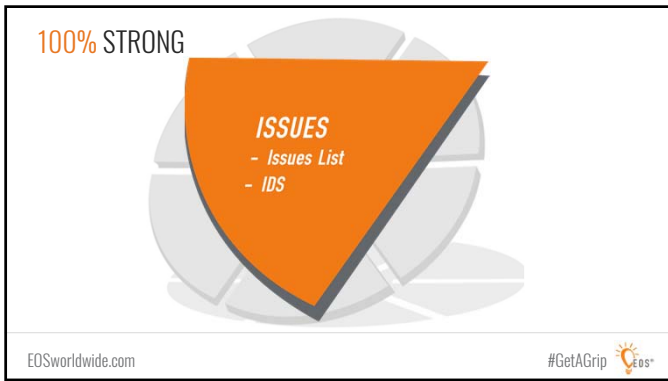
Discuss

Solve

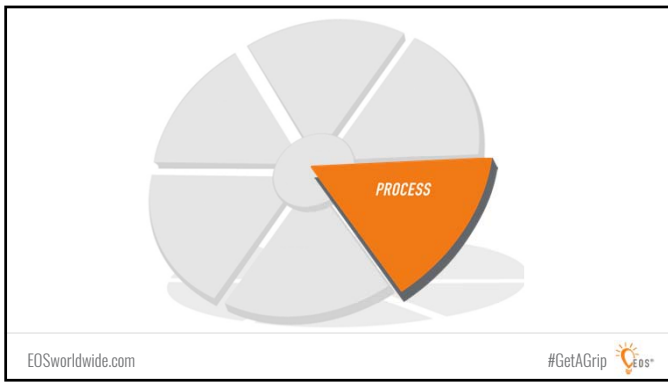
ISSUES LIST	
1.	Website Rock off-track 2
2.	Darren U. Right Person
3.	Andi S. Right Seat 1
4.	Sales off-track
5.	Anodyne Merger 3
6.	Utilization off-track
7.	Western US expansion
8.	
9.	
10.	

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Handful of Core Processes

- People
- Marketing
- Sales/Revenue
- Operations/Programs
- Operations/Programs
- Client Service
- Accounting

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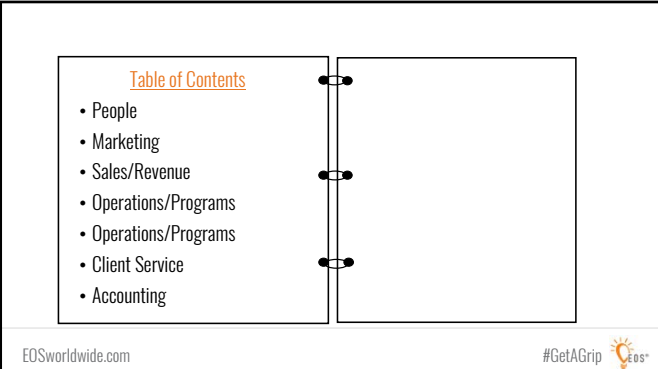


Table of Contents

- People
- Marketing
- Sales/Revenue
- Operations/Programs
- Operations/Programs
- Client Service
- Accounting

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Document and Simplify

People Proc

- ID Need
- Define Seat
- Hiring
- On-Boarding/1
- LMA
- Termination

Sales/Revenue Process

- New Lead
- Initial Call/Qualify
- Fit Meeting
- Proposal
- Win/Lose

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“Your-Org Way”

Table of Contents

- People
- Marketing
- Sales/Revenue
- Operations/Programs
- Operations/Programs
- Client Service
- Accounting

People Process

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

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“Systemize the predictable so you
can humanize the exceptional”

- Isadore Sharp, founder of Four Seasons Hotels

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PROCESS

- Documented

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FBA Checklist

- ☒ Train
- ☒ Measure
- ☒ LMA
- ☒ Update

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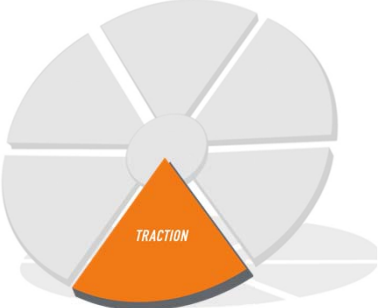
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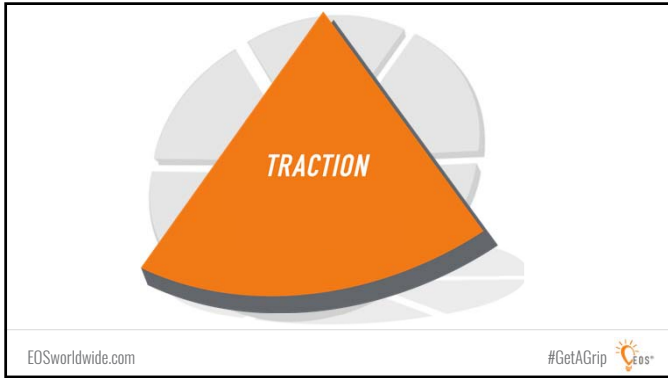
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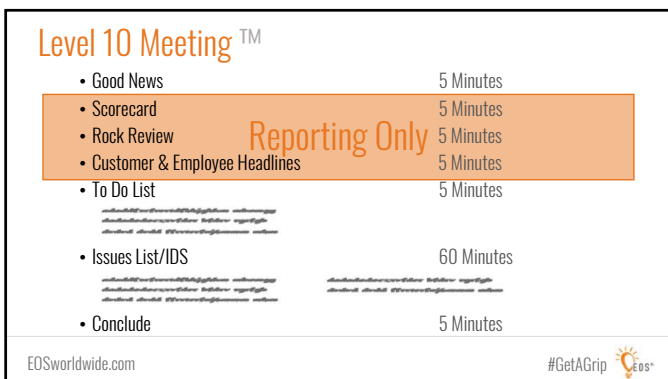
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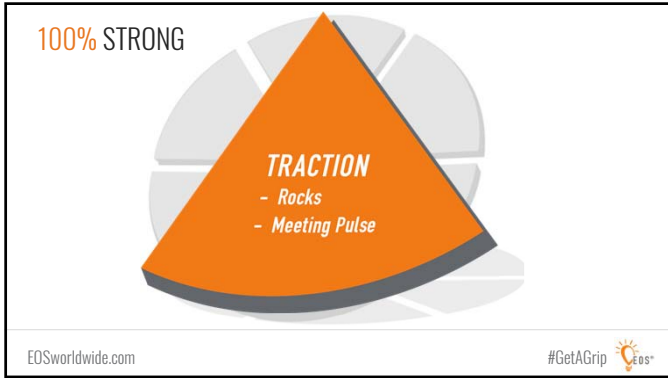
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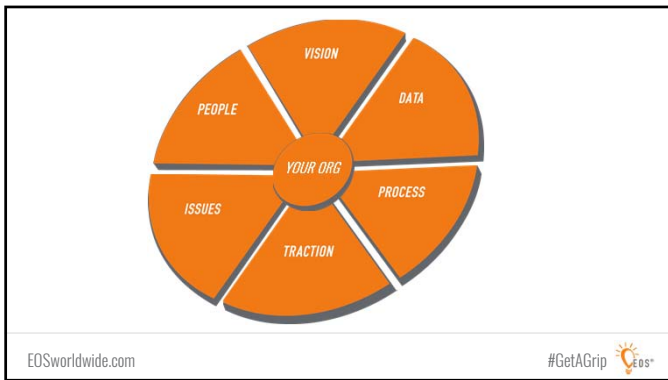
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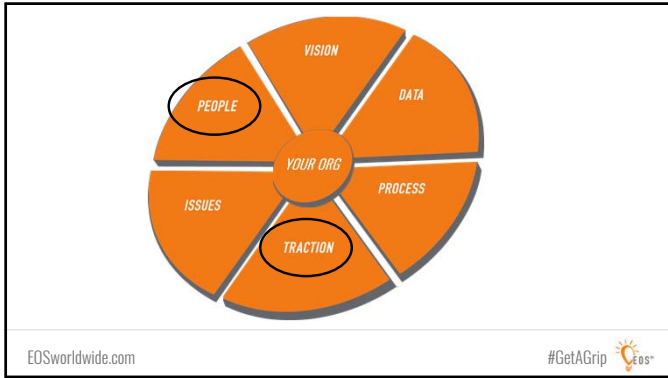
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EOS Foundational Tools™

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

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Resources

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- Traction Library
- Downloadable Tools & Videos
- Base Camp
- Consider a Professional Implementer

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Final Thoughts

- Choose – and **USE** – a **System**
- Leadership Mastery requires **doing our work WITH God**



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EOS: Strategy Execution System

"Thank you so much for your work using EOS to help us get **clarity on how we achieve our vision**. For more than 20 years, I've prayed and asked God to show me **how to realize the vision**. He gave me.

Words do not fully express my gratitude."

-Sherrye Willis, Visionary and EOS Client in Dallas



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"Real. Simple. Results."

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Thank you!

Curt Swindoll
Professional EOS Implementer
@EOSWorldwide

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GET A GRIP

Six Keys to Leadership Mastery
in a Christian Organization

Curt Swindoll
Professional EOS Implementer @EOSWorldwide

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Takeaways & Things to Do

[illegible]

Takeaways & Things to Do

[illegible]