



PM
PATRICK
METZGER

Ready to get **MORE** from your **BUSINESS?**



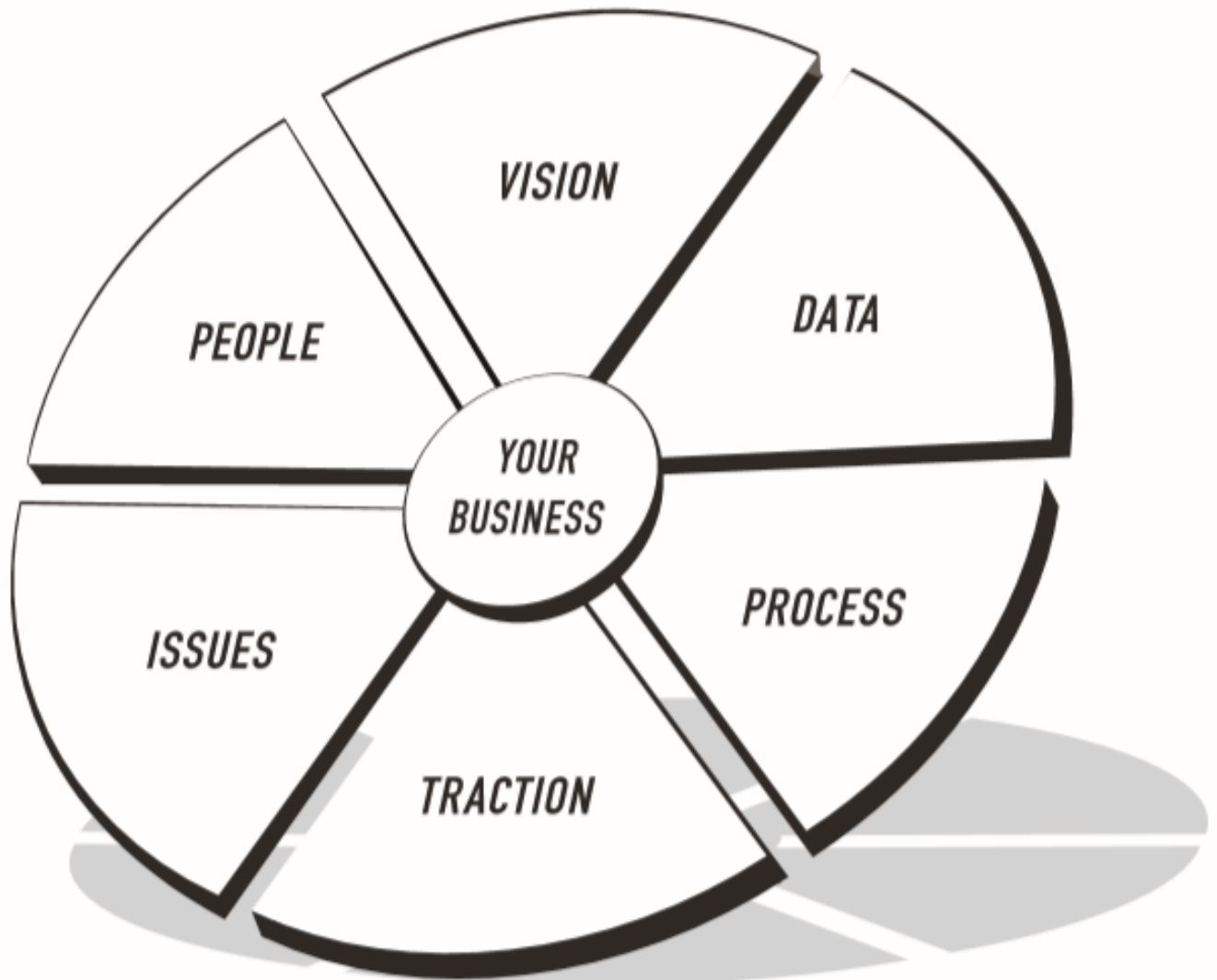
Patrick Metzger

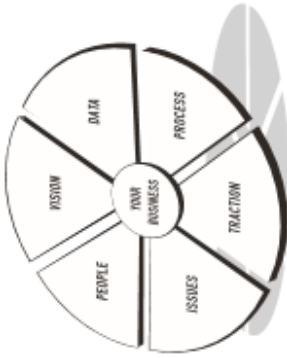
Professional EOS Implementer®
Keynote Speaker
High Performance Coach



(701) 412-1710 | www.patrick-metzger.com | patrick@patrick-metzger.com

THE EOS MODEL™





THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME: _____

VISION

CORE VALUES	<ol style="list-style-type: none"> 1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 	3-YEAR PICTURE™
CORE FOCUS™	Purpose/Cause/Passion: _____ Our Niche: _____ _____ _____	
10-YEAR TARGET™	Target Market/The List: _____ _____ _____	Future Date: _____ Revenue: _____ Profit: _____ Measurables: _____ What Does It Look Like? • _____ • _____ • _____ • _____ • _____ • _____ • _____ • _____
MARKETING STRATEGY	3 Uniques™: <ol style="list-style-type: none"> 1. _____ 2. _____ 3. _____ Proven Process: _____ Guarantee: _____	



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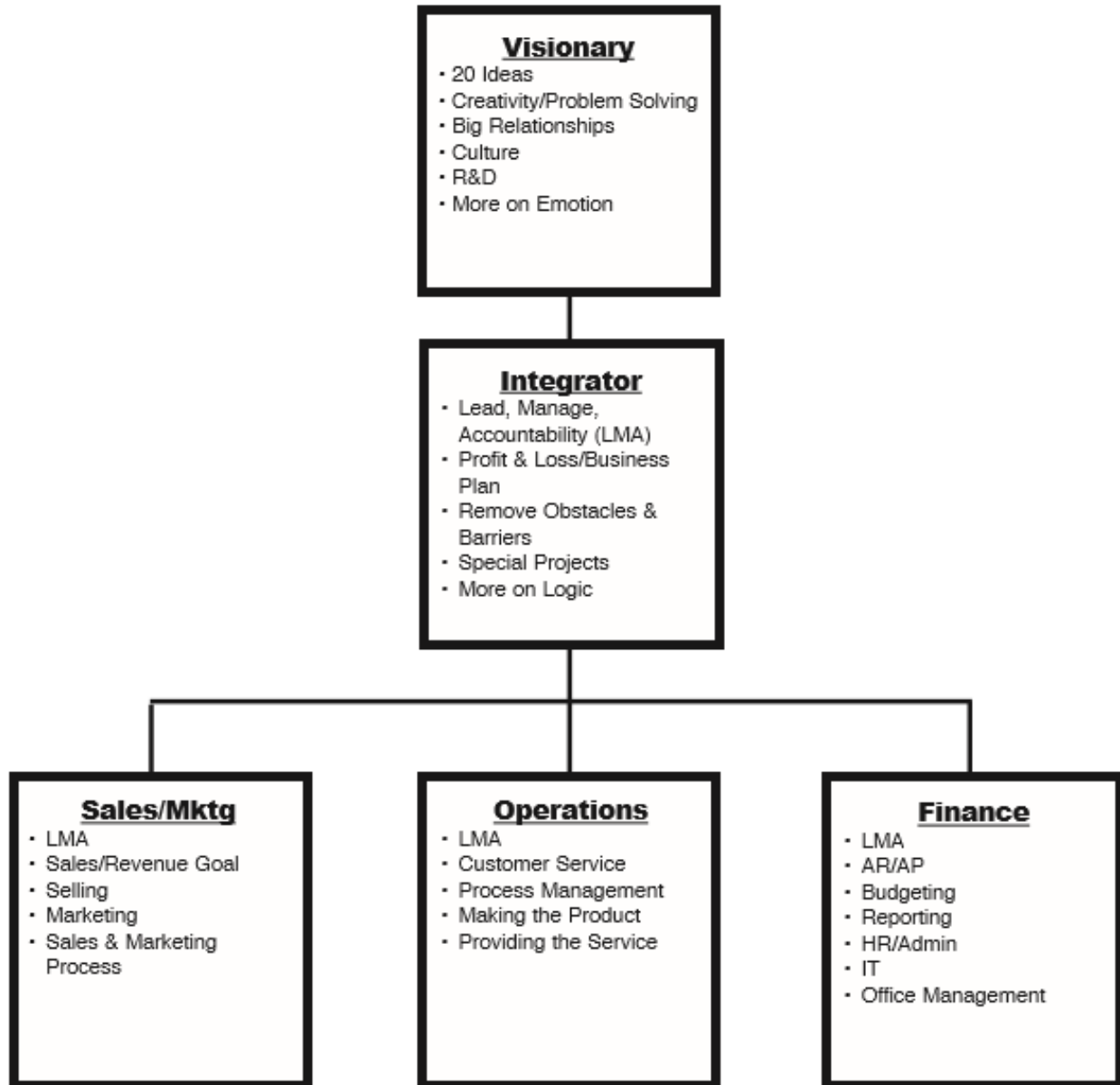
TRACTION

1-YEAR PLAN	ROCKS	ISSUES LIST																																																														
<p>Future date: Revenue: Profit: Measurables:</p> <p>Goals for the Year</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">1.</td><td></td></tr> <tr><td style="text-align: center;">2.</td><td></td></tr> <tr><td style="text-align: center;">3.</td><td></td></tr> <tr><td style="text-align: center;">4.</td><td></td></tr> <tr><td style="text-align: center;">5.</td><td></td></tr> <tr><td style="text-align: center;">6.</td><td></td></tr> <tr><td style="text-align: center;">7.</td><td></td></tr> </table>	1.		2.		3.		4.		5.		6.		7.		<p>Future date: Revenue: Profit: Measurables:</p> <p>Rocks for the Quarter</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">1.</td><td></td><td></td><td></td></tr> <tr><td style="text-align: center;">2.</td><td></td><td></td><td></td></tr> <tr><td style="text-align: center;">3.</td><td></td><td></td><td></td></tr> <tr><td style="text-align: center;">4.</td><td></td><td></td><td></td></tr> <tr><td style="text-align: center;">5.</td><td></td><td></td><td></td></tr> <tr><td style="text-align: center;">6.</td><td></td><td></td><td></td></tr> <tr><td style="text-align: center;">7.</td><td></td><td></td><td></td></tr> </table> <p style="text-align: right;">Who</p>	1.				2.				3.				4.				5.				6.				7.				<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">1.</td><td></td></tr> <tr><td style="text-align: center;">2.</td><td></td></tr> <tr><td style="text-align: center;">3.</td><td></td></tr> <tr><td style="text-align: center;">4.</td><td></td></tr> <tr><td style="text-align: center;">5.</td><td></td></tr> <tr><td style="text-align: center;">6.</td><td></td></tr> <tr><td style="text-align: center;">7.</td><td></td></tr> <tr><td style="text-align: center;">8.</td><td></td></tr> <tr><td style="text-align: center;">9.</td><td></td></tr> <tr><td style="text-align: center;">10.</td><td></td></tr> </table> <p style="text-align: right;"> Prioritize • Identify • Discuss • Solve </p>	1.		2.		3.		4.		5.		6.		7.		8.		9.		10.	
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EXAMPLES OF CORE VALUES

- Shows unequivocal excellence
- Continually strives for perfection
- Wins
- Does the right thing
- Compassion
- Shows honesty and integrity
- Is hungry for achievement
- Is enthusiastic, energetic, tenacious, and competitive
- Encourages individual ability and creativity
- Maintains accountability
- Services the customer above all else
- Works hard
- Is never satisfied
- Is interested in continuous self-improvement
- Helps first
- Exhibits professionalism
- Encourages individual initiative
- Is growth-oriented
- Treats everyone with respect
- Provides opportunity based on merit; no one is entitled to anything
- Has creativity, dreams, and imagination
- Has personal integrity
- Isn't cynical
- Exhibits modesty and humility alongside confidence
- Practices fanatical attention to consistency and detail
- Is committed
- Understands the value of reputation
- Is fun
- Is fair
- Encourages teamwork

THE ACCOUNTABILITY CHART



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.

Function Name
• _____
• _____
• _____
• _____
• _____

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.

Do they:

Get it?

Y N

- 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.

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™

Starting with your issues list, identify the top three issues*, then follow the Issues Solving Track™

*An "issue" is defined as a problem, obstacle, barrier, idea or opportunity. Basically anything unresolved that needs to be discussed.

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

- In an open and honest environment, everyone must share their thoughts, ideas, concerns, and solutions regarding the real issue.
- Discuss and debate.
- Everyone needs to get it all out on the table, but only say it once. If you say it more than once, you are politicking.
- Once everything is on the table and things are getting redundant, it's time for the solution.
- With the greater good in mind, the solution is always simple, though sometimes not easy and sometimes very hard.

Step 3: Solve

- It's more important *that* you decide than it is *what* you decide ... so decide!
- The solution needs to 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 owned by someone and put on the To-Do List, which then are confirmed complete in next week's meeting.

Rule of thumb: On a healthy team, eight out of ten times everyone will agree with the solution. However, two out of ten times they won't, and 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 usually live with it and must support the decision. From there, there must be a united front moving forward.

CORE PROCESSES

- **People Process**
- **Marketing Process**
- **Sales Process**
- **Operations Process(es)**
- **Accounting Process**
- **Customer-Retention Process**

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 activities to be added here</i>	
IDS	60 Minutes
<i>Additional activities to 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**
- **Meeting Pulse™**
- **Scorecard**



CLARIFY, SIMPLIFY & ACHIEVE YOUR VISION



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