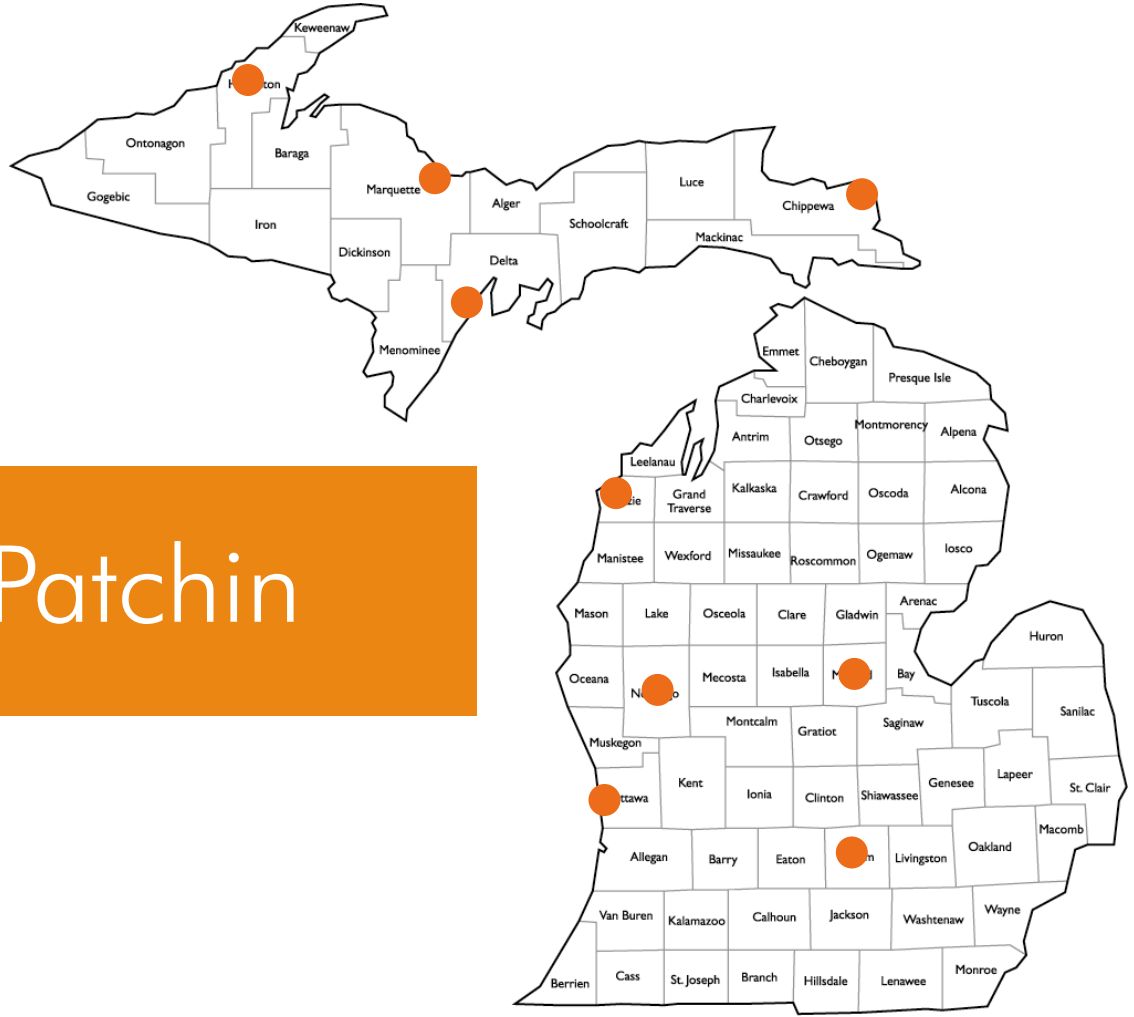
THETRUGROUP.COM

Organizational and Leadership Growth Expert

Strategic Planning: Using EOS® as powerful tool for HEALTHY growth

Scott Patchin



I believe . . .

Great conversations start with a question

About You

Q: Are you currently part of a business or organization? (please stand). Stay standing if . .

- More than one employee
- More than 10 people
- More than 25
- More than 50

Frustrations of Leaders

- People
- Control (lack of)
- Profit
- Overwhelmed / Focus
- Hitting the Ceiling

About You

Q: What is your biggest strategic issue?

A. People
B. Marketing
C. Sales
D. Don't know – too many to pick

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Entrepreneurial Operating System®

EOS®

Entrepreneurial Operating System®

EOS®

Vision: 8 Questions

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

THE EOS MODEL™

THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME:

VISION

CORE VALUES	1. 2. 3. 4. 5.	**3-YEAR PICTURE™** **Future Date:** **Revenue: $** **Profit: $** **Measurables:** **What does it look like?** •
CORE FOCUS™	**Purpose/Cause/Passion:** **Our Niche:**	
10-YEAR TARGET™		
MARKETING STRATEGY	**Target Market/"The List":** **Three Uniques:** 1. 2. 3. **Proven Process:** **Guarantee:**	

THE EOS MODEL™

THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME:

TRACTION

1-YEAR PLAN

Future Date:
Revenue: $
Profit: $
Measurables:

Goals for the Year:

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

With your cursor in the last row, press Tab to add another row.

ROCKS

Future Date:
Revenue: $
Profit: $
Measurables:

Rocks for the Quarter:		**Who**
1.		
2.		
3.		
4.		
5.		
6.		
7.		

With your cursor in the last row, press Tab to add another row.

ISSUES LIST

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

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Entrepreneurial Operating System®

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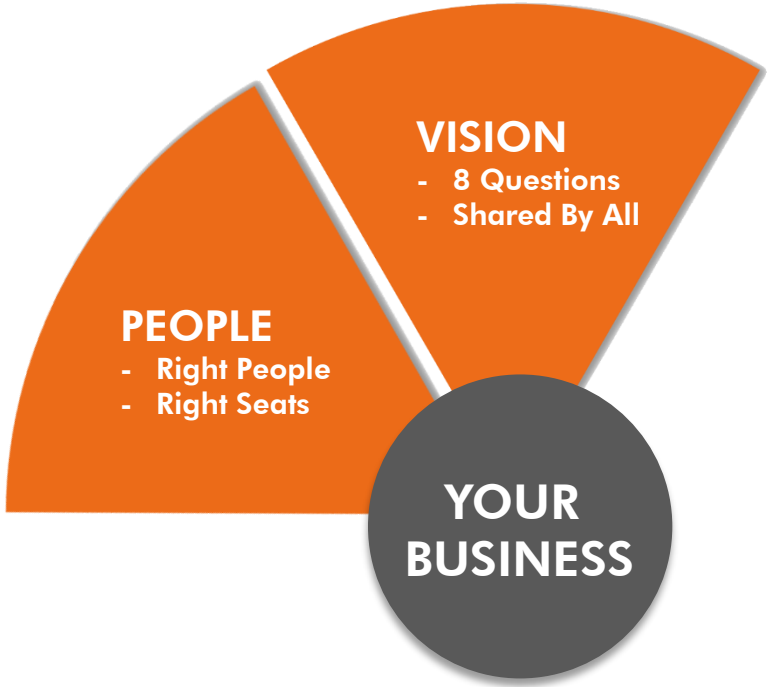
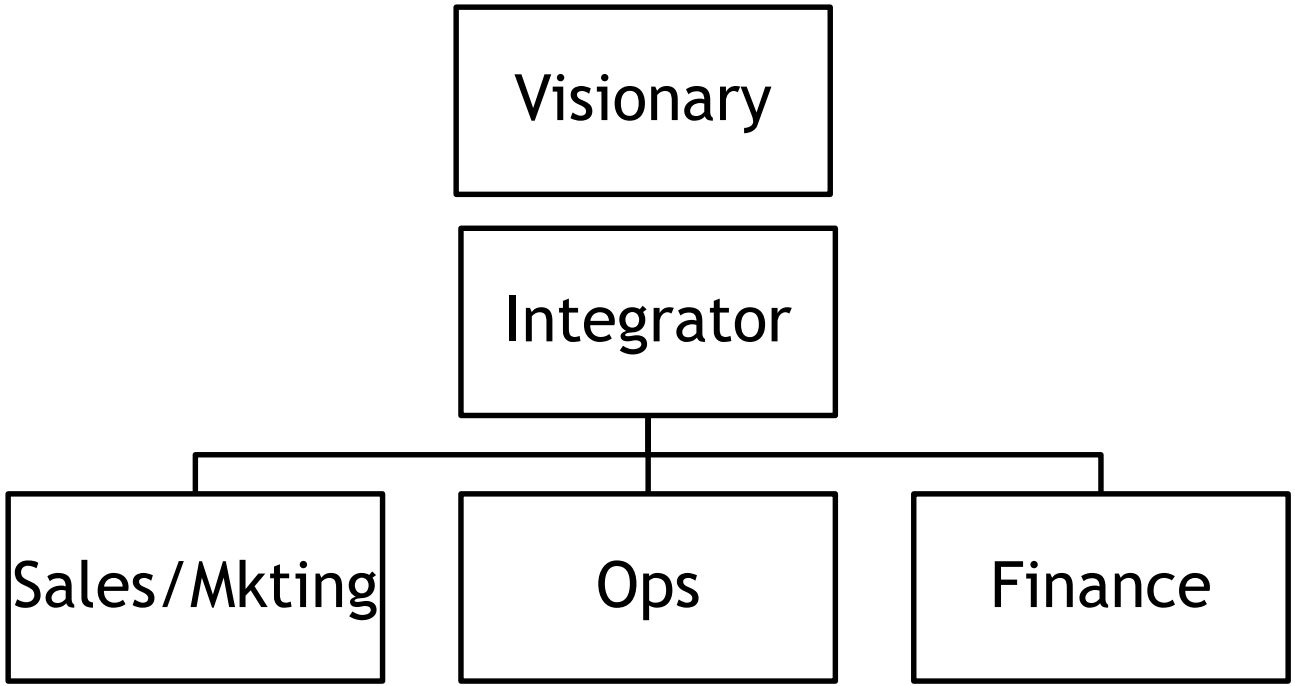


Right People

People Analyzer

NAME	Serve First	Get It Done	Kindness Matters	Learning + Doing = Growth		
Olivia	+	+	+	+		
Hannah	-	-	-	-		
Charlie	+/-	+/-	+/-	+/-		
The Bar	+	+	+	+/-		

Right Seat – Accountability Chart



Right Seat – Accountability Chart

Integrator

- LMA
- Tie breaker
- Team rhythm
- Communication
- Maintain organization focus
- Day to day clarity

Right Seat – Accountability Chart

GWC

- Get It
- Want It
- Capacity to Do It

Right Person / Right Seat

People Analyzer

NAME	Serve First	Get It Done	Kindness Matters	Learning + Doing = Growth	GETS IT	WANTS IT	CAPACITY TO DO IT	
Olivia	+	+	+	+	Y	Y	Y	
Charlie	+	+	+	+/-	Y	Y	N	

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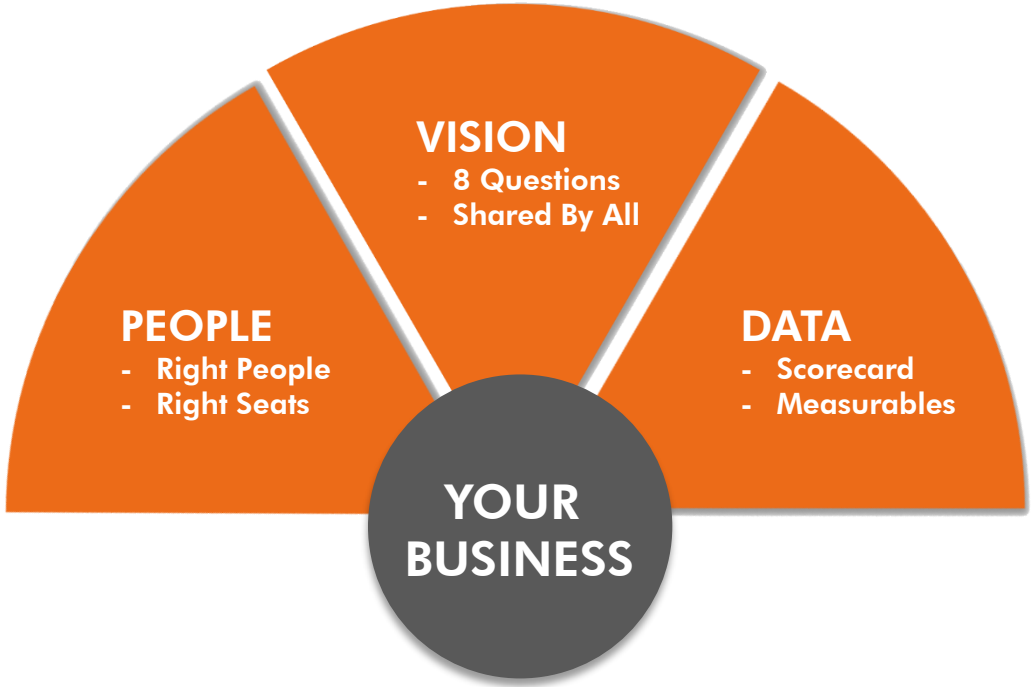

Scorecard

Measurable	Owner	Goal	9/4	9/11	9/18	9/25	10/2	10/9	10/16

5 Reasons Scorecards Are Hard

1. Overthink it
2. Fear (Fixed Mindset)
3. Don't GET the work
4. Nobody Asked
5. Don't see "Journey"

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The LEVEL 10 Meeting™

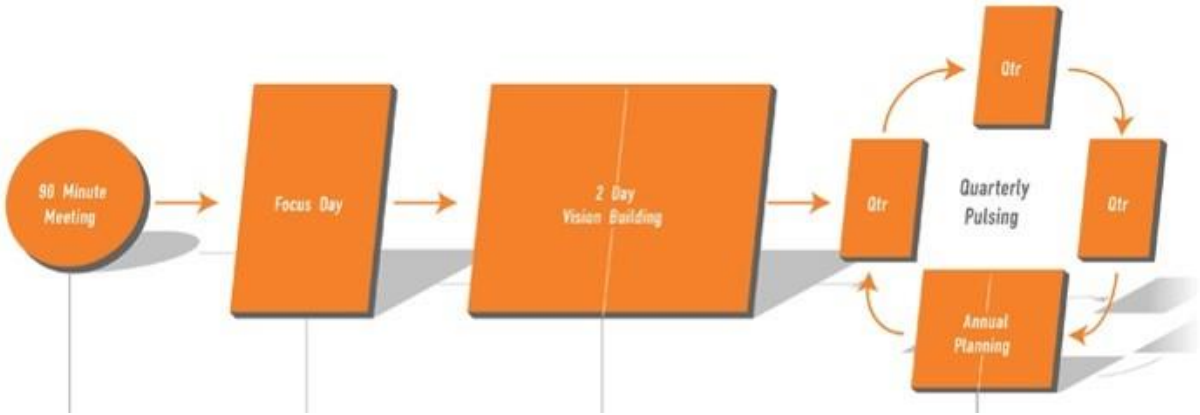
Good News	5 Mins
Scorecard	5 Mins
Rock Review	5 Mins
People Headlines	5 Mins
To-Do List	5 Mins
IDS	60 Mins
Conclude	5 Mins

EOS® – Foundational Tools

1. V/TO™
2. Accountability Chart
3. Rocks
4. Level 10 Meeting™
5. Scorecard

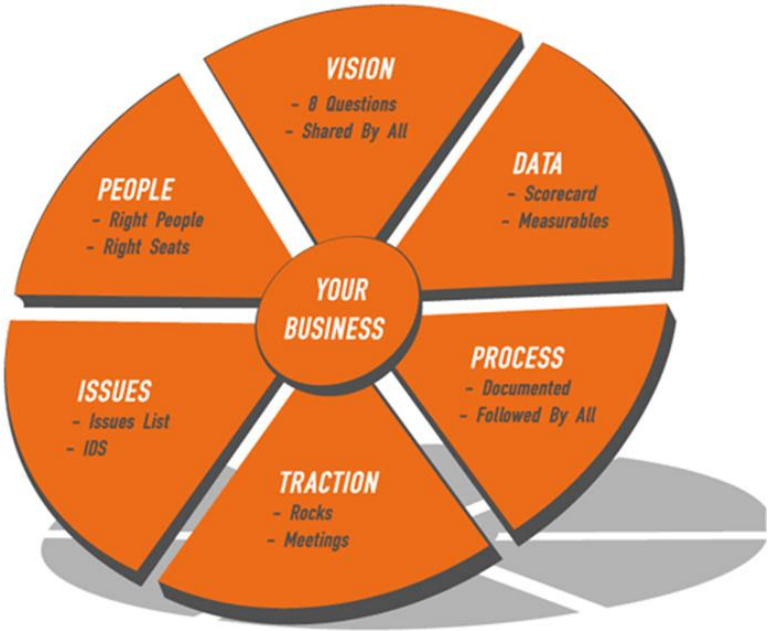
Using EOS® for HEALTHY growth

1 Implement EOS® – proven process



Using EOS® for HEALTHY growth

2 TRACTION® workshop



Serve First

1. Assess your Company
2. Educate your leadership team
3. 45-minute face-to-face (4 time slots)
4. scott@thetrugroup.com / 616.405.1018
5. Sign-up for blog and EOS mailing lists

If You Want to Go FAST,
go ALoNe.
If You Want to Go FAR,
go ToGeTHeR.
- african proverb
If your BUSINESS needs to go FASTER and FARTHER ~ TOGETHER
www.thetrugroup.com/eosjourney

Learn more about People-Centered Leadership™

FREE ebook

28 Tips for Developing as a People-Centered Leader

About the Speaker – Scott Patchin

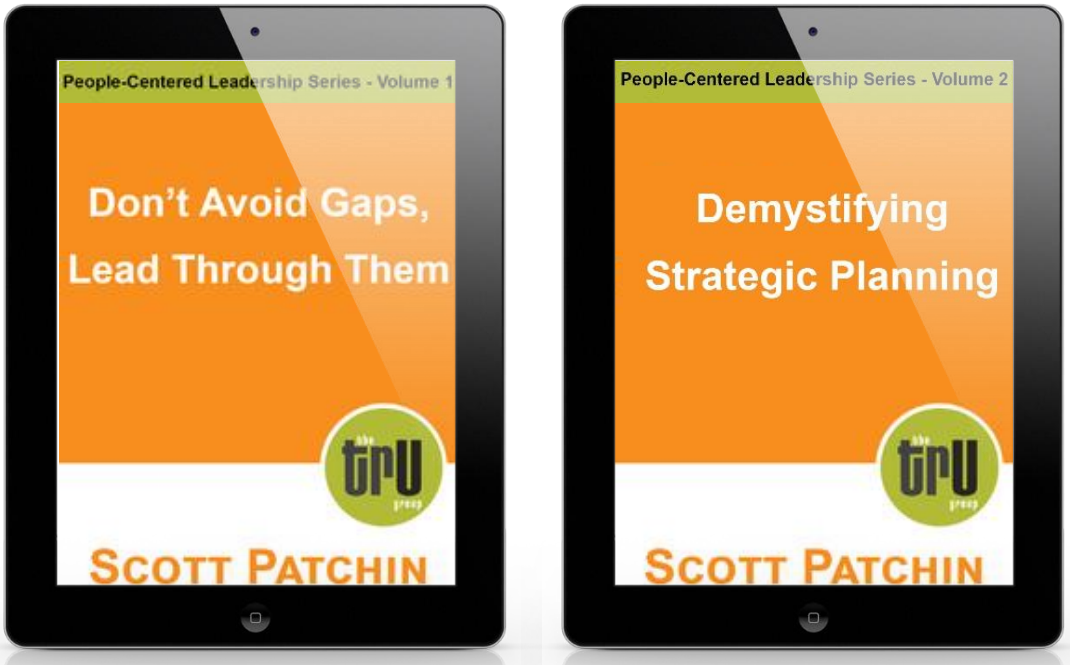
Scott has a core belief that the habits leaders practice and the conversations they have with their people are the keys to their success. He launched his leadership development company, The trU Group, in 2009 around his passion for *maximizing individual growth and eliminating needless pain – moving to and past the tipping point of success.*

He has work experience in manufacturing, healthcare, and banking/mortgage industries. He is an author, blogger, coach, and delivers a *hands-on* keynote. He resides in Michigan, has spoken across the Midwest on people-centered leadership, and is an experienced Entrepreneurial Operating System® implementer.

Learn more: linkedin.com/in/scottpatchin www.thetrugroup.com

Scott Patchin

What is leadership?



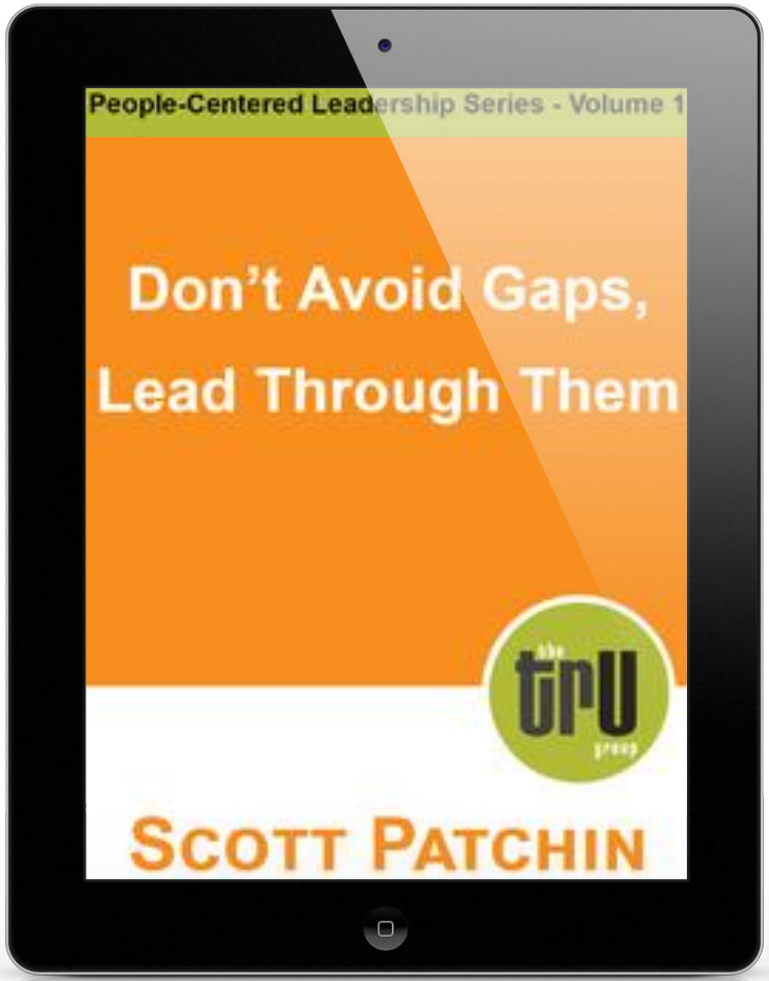
*available for free download on kindle, nook, ibooks, kobo, tolino, scribd, inktera

Gap #1
Strategy Gap

Creating an organizational performance gap

Gap #2
Execution Gap

Managing the gap in your organizational performance

Gap #3
Talent Gap

Managing the individual performance gap created by #1 and #2