

THE BATL

B.O.S.

PLAN

COMMON FRUSTRATIONS



LACK OF CONTROL

Not enough control over your time, the market or your company. Instead of you controlling the business, the business is controlling you.



PEOPLE

You're frustrated with employees, customers, vendors or partners. They don't seem to listen, understand you or follow through with their actions.



PROFIT

Simply put, there's not enough of it.



THE CEILING

Your growth has stopped. No matter what you do, you can't seem to break through and get to the next level. You feel overwhelmed and unsure of what to do next.



NOTHING IS WORKING

You've tried various strategies and quick-fixes. None have worked for long and as a result, your staff has become numb to new initiatives. You're spinning your wheels and you need traction to move again.

WHAT IS AN OPERATING SYSTEM?

A business operating system is a complete set of simple concepts and practical tools that has helped thousands of entrepreneurs around the world get what they want from their businesses.

It's a people operating system that harnesses human energy through a simple set of tools and principles. You didn't become an entrepreneur to feel burned out or stuck in place.

A successful operating system gets you “unstuck” by organizing the hundreds of challenges you face every day and making them more manageable. You're able to solve issues before they become problems, get the right people in the right seats, make meetings so productive that you actually look forward to them, and build a culture of accountability.

KEYS TO SUCCESS

We must be growth oriented, willing to change and have a willingness to be vulnerable. Beyond that we must focus on strengthening six key areas of our businesses:

- Vision
- People
- Information
- Issues
- Processes
- Traction

Overall, we need to keep everything simple. There is a trend with entrepreneurs where we tend to make things more complicated than they need to be. This time, let's keep it simple and use these lessons to make the simple decisions to move our businesses forward.

VISION



Do they see what you're saying? Think of a recent client, do they know what your vision is? Describe how they knew it:



You see your vision but have you put it on paper? Do so here:



Your vision has to be so much bigger than you, what's that look like?



Overall, what is vision to you? How would you define it in business?

CORE VALUES

The small set of vital and timeless principles that guide you to success. These are for both you and your company, and be mindful that the most success comes from when those align.

As you realize what your core values are, you need to remember to keep them simple. Really narrow your focus to 3-7 core values.



What are your core values?

CORE FOCUS

You can think of this portion as your mission statement or vision statement. This is what you should be laser-focused on and should be the singular things that you focus on the most.

An important aspect here is to remember that you can't go chasing shiny objects until you have accomplished your core focus.

Answer these two questions:

- Why does your organization exist? Purpose, Cause or Passion?
- What is your organization's niche?



What is your core focus?

★ BE A TACTICAL LEADER ★

10 YEAR TARGET

This portion is your big, hairy, audacious goal that keeps you driving forward. Where do you want your organization to be in the next decade? This is really the larger than life goal that everyone is working toward, the thing that everyone within the organization is striving to accomplish.

While this length is up to you, studies show that most entrepreneurs, 9 out of 10 in fact, chose this time-frame as their big goal.



What is your 10 year target?

MARKETING STRATEGY

There are 4 main parts that make up a marketing strategy that you must understand for your vision to be accomplished. Those four parts are:

- Your target market
- Your three uniques
- Your proven process
- Your guarantee

If you haven't thought through those things yet, take the time you need to identify each of them.



What is your marketing strategy?

3 YEAR PICTURE

As you review the V/TO, you'll see that the three-year picture is made up of measurables at the top and then bullet points to create the overall picture. Don't overthink this portion of the mission, try to keep it simple and recognize we will work our way to accomplish this goal.

Create 10-20 bullet points highlighting several different aspects of your goals, such as: revenue, profits, people, resources and environment.



What is your 3 year picture?

1 YEAR PLAN

This portion of gaining a grip on your business is really going to help you bring your long-term vision to the ground and make it real for yourself. This means we must decide what has to get done this year.

This is similar to the 3 year plan, focus on revenue, profits, what is measurable for you to accomplish? The numbers should be consistent and measurable alongside the 3 year plan, building to accomplish that picture.



What is your 1 year plan?

YOUR ROCKS

Quarterly Rocks help you identify what you need to accomplish over the next 90 days. This highlights a window to success for you. As we highlight your Rocks, let's continue thinking about how to reverse engineer your success.

Remember that less is always better and you don't need to overwhelm yourself here. Think of 3-7 things that you **MUST** accomplish in the next quarter to make sure you're in line with achieving your successes. And once set, you can't add any more!



What are your quarterly Rocks?

YOUR ISSUES

This is the final question to answer about your vision and what you plan to accomplish in the next year. It may seem strange to include this portion but this is highly important. You need to be able to clearly identify any obstacles that you may face so that you can push forward.

This list should be around 15-20 issues that you recognize and can be any obstacle, concern or opportunity you face in achieving your vision.



What are your issues in business?

YOUR PEOPLE

It's time to cut through all the fancy words for "good people"... We've all heard them called superstars, top performers, employee of the month but what makes them the "right" person for your organization?

They share your core values, both personally and for your business. You enjoy being around them and they make your organization a better place to be.

This can be both employees and clients, think about people in your organization and assess more about them.



Who are some people that represent your "right person?"

TAKING OWNERSHIP

When your clients or employees make a mistake or don't maintain agreed upon aspects of working together, whose fault is it? Do they make an excuse or take ownership?

What about when you make a mistake? Do you take ownership or do you make an excuse as well?

Taking ownership is one of the key components to operating with honesty and integrity BUT there is a dichotomy... You must maintain accountability as well!



Think of some examples when ownership wasn't taken and list them below:

YOUR ORGANIZATION

In order to put people in the right place in your organization, we must first recognize the different roles that you have and must fill.

Be mindful to remove yourself from the organization initially so that you can fully encompass every area of growth your business may need in the future.


Two of the most important roles are the Visionary and the Integrator. This CEO and COO roles. Do you have an integrator? It's common for this to be overlooked.

 Take some time to think about all the roles your ORG could need in the future.

IDENTIFYING YOUR DATA

Imagine every aspect of your business that you wish to have continued success in. Everything that you would like to track, which can then be grown. The categories could be as granular as weekly revenue, cash balances, sales activity, client updates, touch points, new meetings... whatever you want to improve on.

We have to recognize only the thing we track can be improved on. If we aren't taking the time to note things, we won't keep them in our mind. Be sure to use the Scorecard to track this WEEKLY.

 Brainstorm some data points and success metric points you want to track:

UNDERSTANDING KPI'S

There are several considerations you should understand before you start tracking your KPI:

- First and foremost, understand these need to be granular aspects of your business, something that changes WEEKLY.
- Weekly information is highly important but don't forget to pay attention to and keep track of how your monthly numbers are influenced.
- Think about red flagging your categories that are off track. Make sure that they stand out so you can start focusing on the areas that need the most attention.



What are some areas that you already know you need to focus on?

Head over to the Scorecard to start tracking your data!

YOUR ISSUES

When the vision is clear, the people and clients are in place, and you're managing data, you will inevitably find out what's holding you back. The most successful companies identify, admit and solve their problems.

Napoleon Bonaparte said "Nothing is more difficult and therefore more precious than to be able to decide."

That means we have to recognize what is broken so we can fix it and take action, move forward with our businesses. Your ability to succeed is in direct proportion to your ability to solve your problems.

The greatest trait a leader can have is being decisive.



Think about your issues, recognize what they are, then list a few of them:

SOLVING YOUR ISSUES

Identify, Discuss, Solve:

The three steps to understanding and fixing the issues your business is facing right now. We are going to determine your top three issues and then identify the people around you that can help you solve them the fastest.

Your issues may be uncomfortable but you must be vulnerable enough and willing to change to make this happen for yourself.

As you Discuss and Solve, make sure everything is said and discussed, leave nothing on the table here.

 Determine your top 3 issues and identify who is going to discuss with you:

THE 10 BATL TACTICS

- You will not decide by consensus
- You will have resolve and determination
- You will be decisive
- You will NOT rely on second hand information
- You will stay focused on the greater mission
- You will solve one problem at a time
- You will live with it, end it or change it
- You will choose short-term suffering
- You will face your greatest fear
- You will take action

 It's time to take action and become BATL Strong, what's your first step?

YOUR PROCESS

Nothing can be fine tuned until it's first consistent. Understand that as a business owner, you want to make sure the customer and employee experience are consistent across the board. There are generally seven core processes that make up your unique business model.

This component is often the most neglected and overlooked aspect of an entrepreneur's business. Don't let this be your biggest shortcoming.



Is there anything currently in your business that you want to create more consistently?

I.D. YOUR PROCESSES

Generally, you don't want to delegate this to one person in particular. Use the team you have in place in order to help you identify these processes.

Follow the 20/80 rule: document the 20 percent that produces 80 percent of the results. In other words, document at a very high level.

There are typically these 7 processes: HR, Marketing, Sales, Operations, Accounting and Customer Retention.



Can you identify the 7 core processes that guide your business?

DOCUMENT YOUR PROCESSES

This is where the accountability chart comes into play, whomever is responsible for the process should be the one documenting it.

*** REMEMBER ***

Follow the 20/80 rule: document the 20 percent that produces 80 percent of the results. In other words, document at a very high level.



Take time to document the core processes of your business:

EXAMPLE OF A PROCESS

THE HR PROCESS

Step 1: The Search

- Define role/job description/salary
- Decide search medium
- Begin search
- E-mail 20 spheres/peers

Step 2: Interviewing

- Screen resumes
- Initial interview/profiling tools
- Second interview
- Check references
- CEO interview/core values speech

Step 3: Hiring

- Eight hour OJT/trial
- Decision
- 90-day trial

Step 4: Orientation

- HR policy/review employee manual
- Benefits review/forms
- Position training
- CEO Orientation (company story/culture)

EXAMPLE OF A PROCESS

Step 5: Quarterly Reviews

- Manager fills out the PA in preparation for the review
- Follow the review checklist
- Review the PA
- Document the review and have it signed by all
- File review with the HR department

Step 6: Termination

- Three strike rule with documentation
- Terminate upon third strike
- Contact legal counsel
- Meet with employee/HR present
- Exit interview
- Document termination and have it signed by all

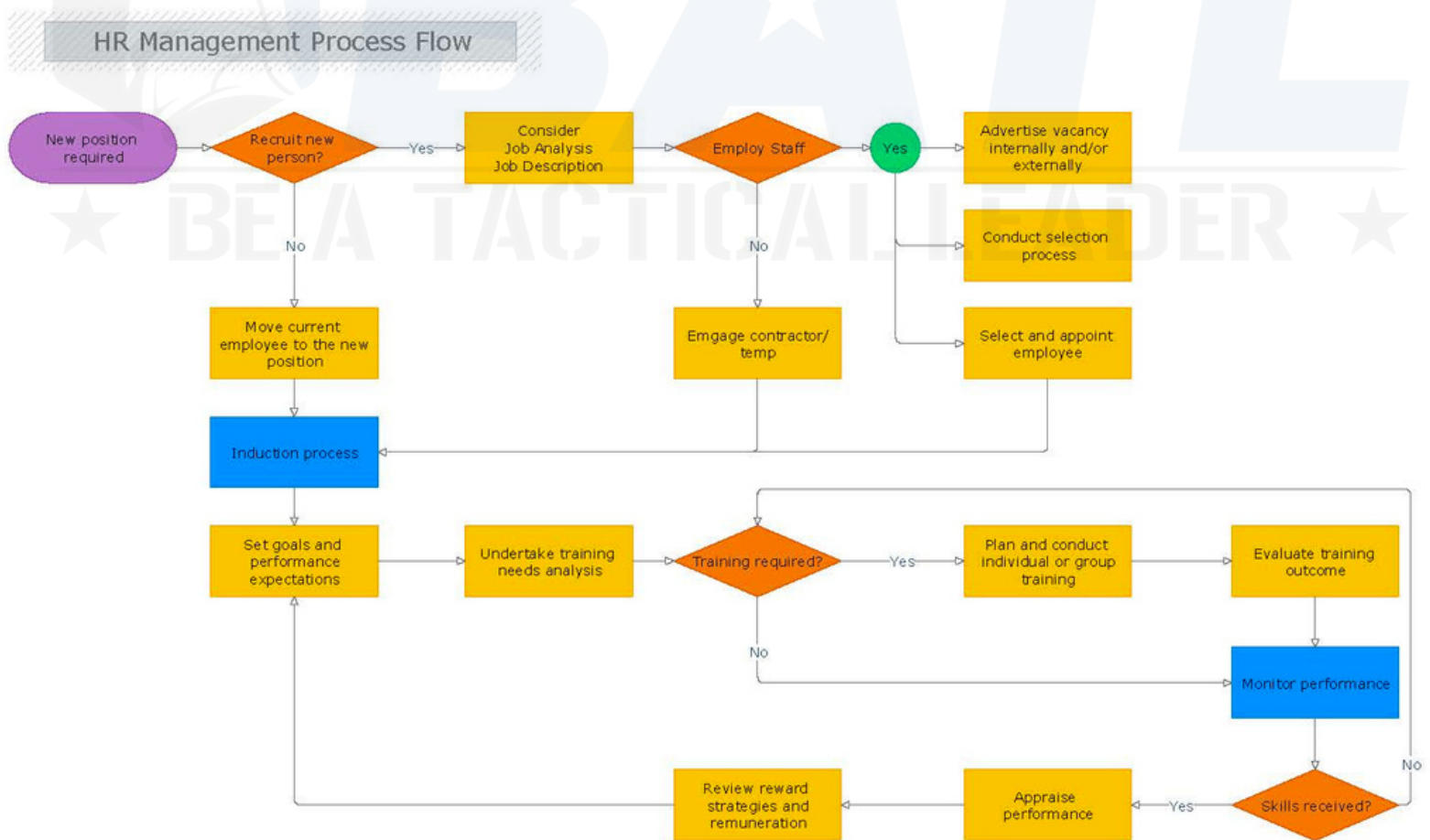
Step 7: Ongoing Benefits Management

- 401K Management
- Bonus Plan
- Health Insurance
- Employee Files

FOLLOWED BY ALL

Everyone in your organization needs to understand the importance of using one and only one process. That means the CEO and the new hire all must use the same process involved.

One of the best ways is to create a visual model and illustration for each employee to follow. These visuals can be called mapping or Circle of Life, where the process is easily understood in a graphic.



GAINING TRACTION

Action is the process of doing. Now that we've mapped everything out, it's time to take action. The ability to create accountability and discipline is one of the most difficult aspects for any business to master.

Two aspects of the discipline needed is specific, measurable goals for and from everyone and you must meet better as an organization. Your Rocks and your Meeting Pulse.



Have you identified your goals and meeting pulse yet?

ESTABLISHING YOUR ROCKS

This is where we are going to establish your rocks, your 3-7 goals for the next 90 days.

Step 1:

Review your V/TO and whiteboard everything you want to accomplish in the next 90 days. Most leadership teams come up with 10-20 items.

Step 2:

From that list, discuss, debate and determine what your 3-7 rocks are going to be. Set your priority to each one and determine if you keep it, kill it or pass it to the next quarter.

 List your current Rocks, however many you currently have:

ESTABLISHING YOUR ROCKS

Step 3:

Once you've narrowed it down, set a date for each Rock to be completed. Remember, it must be specific, measurable and attainable: "close three core accounts."

Step 4:

Now, assign who is responsible for each Rock, this clarity is key. All of them may be you for now, if not, you may have to outsource some of them. Determine now the one person who is responsible for them.

 List your 3-7 Rocks, and who is responsible for accomplishing them:

ESTABLISHING YOUR ROCKS

Step 5:

Now that your rocks are set and assigned, how many are you personally responsible for? If you aren't directly responsible for 3-7 of these Rocks, create your own Rocks that will impact the original 3-7.

Step 6:

Once all of your Rocks are completed, create a Rock Sheet that you and your team can utilize to keep your goals directly in front of everyone. This is an important reminder for you and each of your team members as you establish more accountability in your company.



List Rocks and the owner of each, from Company level to individual level:

AVOID THE PITFALLS

AVOID THESE PITFALLS:

Garbage in/garbage out:

You will get exactly what you put into each aspect of these steps. Take the necessary time and don't rush the process.

It takes two quarters to master Rocks:

Be patient and understand it takes time to get into the flow of true mastery with these goals. More experience with this flow will further improve your capabilities in accomplishing them.

Commitment Fizzle:

Make sure as you roll out your Rocks you are fully committed to accomplishing them each quarter. Don't let these become a flavor of the month.

Too many Rocks:

Don't give more than 3 Rocks to anyone outside of the leadership team. Most employees will become overwhelmed and you will violate the golden rule that less is more.

MEETING PULSE

Let's dispel that meetings are bad, right here and now. The fact is, meetings are essential but a well run meeting is vital, they are the moment of truth for everyone in your organization. This is where the L-10 meeting framework comes into play, a meeting that is frequent and saves time. The overall Meeting Pulse consists of two types of meetings: quarterly and weekly.

QUARTERLY MEETING PULSE

Who: The leadership team

Where: off-site

Duration: Eight hours

Frequency: Every 90 days

Pework: Bring V/TO complete (everyone brings his or her issues and proposed priorities for the coming quarter)

QUARTERLY MEETING AGENDA

- Segue
- Review previous quarter
- Review the V/TO
- Establish next quarter's Rocks
- Tackle Key issues
- Next steps
- Conclude

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ANNUAL MEETING PULSE

Who: The leadership team

Where: off-site

Duration: Two days

Frequency: Every year about the same time

Pework: Bring V/TO completed, proposed budget for next year, thoughts on goals for next year

ANNUAL MEETING AGENDA

- Segue
- Review previous year
- Team health building
- SWOT/issues list
- V/TO (through one year plan)
- Establish next quarter's Rocks
- Tackle key issues
- Next steps
- Conclude

MEETING PULSE

Five Key Points for Weekly meetings:

- Be on the same day each week
- Be at the same time each week
- Have the same printed agenda
- Start on time
- End on time

WEEKLY MEETING PULSE

Who: The leadership team

Where: Office conference room

Duration: 90 minutes

Frequency: Every week

Pework: Rocks established and Rock Sheet created; scorecard complete; issues solving track understood

WEEKLY MEETING AGENDA

- Segue - 5 minutes
- Scorecard - 5 minutes
- Rock review - 5 minutes
- Customer & employee headlines - 5 minutes
- To-do list - 5 minutes
- IDS - 60 minutes
- Conclude - 5 minutes

TAKING ACTION

Context is clear and mastery is near. Recognize this will take time and have the right people in the right place will benefit you greatly. That could be employees, clients, coaches or mentors. Everything you learn about business moving forward will be able to fit into your B.O.S., your Business Operating System.

I recommend slowly implementing overall aspects of this B.O.S. plan and understand there will be moments of friction that arise. As you master certain aspects on a higher level within your organization, move to the next lower level with that aspect. Overall, be patient with this implementation, you can only move at your own speed.

As you implement each piece and find the right team to help you and your team stay accountable, be prepared to continue to review and revise your plan once or twice a year with your team, coaches and mentors.

WHY IT WORKS

The 90-day Plan stems from humans only being able to focus that long.

The To-Do List in the weekly meeting is designed to ensure accountability.

The V/TO is designed to get your vision out of your head and into the heads of others using a simplified approach of only 8 questions.

Data forces you to give people numbers so you can measure achievement.

Core Values go to the heart of human nature.

The Meeting Pulse forces people to stay connected and keep their circles connected.

The Issues Solving Track addresses the natural tendency to avoid conflict and instead removes emotion.

A single system directs talent and energy in one direction for the entire organization.

ORGANIZATION CHECK-UP

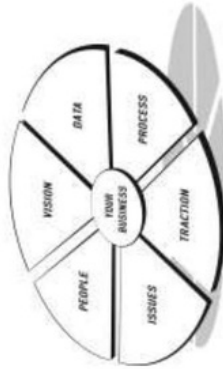
For each statement below, rank your business on a scale of 1 to 5, where 1 is weak and 5 is strong.

	1	2	3	4	5
We have a clear vision in writing that has been properly communicated and is shared by everyone in the company.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our core values are clear, and we are hiring, reviewing, rewarding, and firing around them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our Core Focus (core business) is clear, and we keep our people, systems, and processes aligned and focused on it.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our 10-Year Target (big, long-range business goal) is clear, communicated regularly, and is shared by all.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our target market (definition of our ideal customer) is clear, and all of our marketing and sales efforts are focused on it.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our 3 Uniques (differentiators) are clear, and all of our marketing and sales efforts communicate them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have a proven process for doing business with our customers. It has been named and visually illustrated, and all of our salespeople use it.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All of the people in our organization are the "right people" (they fit our culture and share our core values).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our Accountability Chart (organizational chart that includes roles/responsibilities) is clear, complete, and constantly updated.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Everyone is in the "right seat" (they "get it, want it, and have the capacity to do their jobs well").	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our leadership team is open and honest, and demonstrates a high level of trust.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Everyone has Rocks (1 to 7 priorities per quarter) and is focused on them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Everyone is engaged in regular weekly meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All meetings are on the sale day and at the same time each week, have the same agenda, start on time, and end on time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All teams clearly identify, discuss, and solve issues for the long-term greater good of the company.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our Core Processes are documented, simplified, and followed by all to consistently produce the results we want.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have systems for receiving regular feedback from customers and employees, so we always know their level of satisfaction.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A Scorecard for tracking weekly metrics/measurables is in place.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Everyone in the organization has at least one number they are accountable for keeping on track each week.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have a budget and are monitoring it regularly (e.g. monthly or quarterly).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

VISION AND TRACTION

THE VISION/TRACTION ORGANIZER

Purpose - To Clarify Objectives and Key Results



ORGANIZATION:

CORE VALUES (Internal)	1. 2. 3. 4. 5. Purpose/Cause/Passion: Our Niche:	3-YEAR PICTURE
CORE FOCUS (External)	6. 7. 8. 9. 10.	Future Date: Revenue: \$ Profit: \$ Measurables: 1. 2. 3.
10-YEAR TARGET	What does it look like?	
MARKETING STRATEGY	Target Market / "The List": Three Uniques: 1. 2. 3. Proven Process: Guarantee:	

EOS/Management Insight

VISION AND TRACTION

THE EOS MODEL™



THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME:

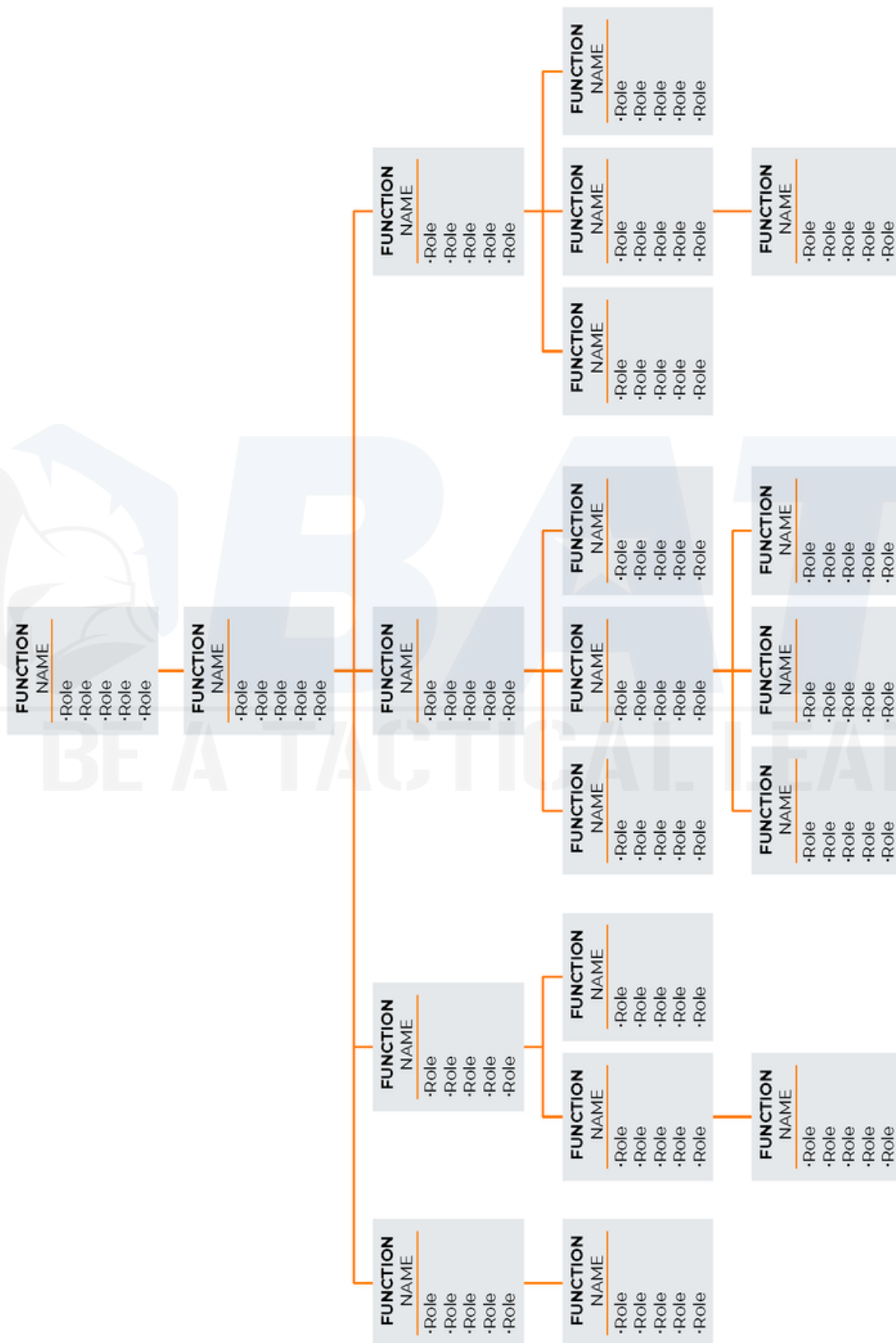
TRACTION

1-YEAR PLAN	ROCKS	ISSUES LIST																															
<p>Future Date: Revenue: \$ Profit: \$ Measurables:</p> <p>Goals for the Year:</p> <table border="1"> <tr><td>1.</td></tr> <tr><td>2.</td></tr> <tr><td>3.</td></tr> <tr><td>4.</td></tr> <tr><td>5.</td></tr> <tr><td>6.</td></tr> <tr><td>7.</td></tr> </table> <p>With your cursor in the last row, press Tab to add another row.</p>	1.	2.	3.	4.	5.	6.	7.	<p>Future Date: Revenue: \$ Profit: \$ Measurables:</p> <p>Rocks for the Quarter:</p> <table border="1"> <tr> <td>1.</td> <td>Who</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> <p>With your cursor in the last row, press Tab to add another row.</p>	1.	Who	2.		3.		4.		5.		6.		7.		<table border="1"> <tr><td>1.</td></tr> <tr><td>2.</td></tr> <tr><td>3.</td></tr> <tr><td>4.</td></tr> <tr><td>5.</td></tr> <tr><td>6.</td></tr> <tr><td>7.</td></tr> <tr><td>8.</td></tr> <tr><td>9.</td></tr> <tr><td>10.</td></tr> </table> <p>With your cursor in the last row, press Tab to add another row.</p>	1.	2.	3.	4.	5.	6.	7.	8.	9.	10.
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ORGANIZATIONAL CHART



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WHAT'S INCLUDED IN A LEADERSHIP MEETING COMPATIBLE WITH EOS?

Now that you have some tips for running a successful leadership meeting and a better understanding of whether or not you want to make them compatible with EOS, let's cover what to add to your agenda.

The agenda starts with 25 minutes at the top dedicated to reporting and updates. Then, the bulk of the meeting is spent identifying and solving the most important issues of the week.

Remember, time allotments aren't suggestions! Following the agenda items and time exactly will allow you and your team to get the most out of this meeting format.

Here's what's on the agenda:

Check-in (5 minutes)

Start the meeting with a personal check-in. Share a win, or an "aha!" moment to kick the meeting off on a positive.

While the agenda is rigid, it's important to recognize that everyone's human! Starting off the meeting with some good news is a great segue into "reporting mode."

Scorecard (5 minutes)

Okay, you've celebrated some wins, now it's time to get down to business.

This section is meant to discuss 3-5 metrics that pass the "beach test."

The beach test is the idea that if you're on a beach vacation and these metrics are off track (think your app is down, cash flow, etc.) you'd fly home to fix it.

Rock updates (5 minutes)

"Rocks" are projects that will take up a quarter's worth of work. Go through company and department "rocks" and whether they're on or off track.

If a rock is off track, add it to the issues portion of the agenda to tackle in that section.

At this point in the meeting, you're solely focused on getting through updates.

Client/employee headlines (5 minutes)

If you had a newspaper dedicated to client and employee news, what would the headlines be? That's what you're sharing in this section.

Headlines should be one-sentence updates so that everyone can stay up-to-date on what's happening with all your people — good or bad news.

WHAT'S INCLUDED IN A LEADERSHIP MEETING COMPATIBLE WITH BOS?

To-do list (5 minutes)

Run through the to-do list (this carries over from meeting to meeting) and check off what's done, not done and in progress. Ideally, the items on your to-do list are 7-day action items, which means you should be able to cross out the majority of the to-dos from the prior meeting.

The to-do list actually lives within the agenda — another reason it's important to use the same agenda each week.

Issues list: identify, discuss, solve (IDS) (60 minutes)

Everything up until this point in the meeting is the pretext. The crux of your meeting focuses on understanding the root of problems and constructively solving them, rather than jumping to solutions. The discussion portion provides an opportunity to dig deeper to identify the true root of the problem— arguably, one of the most important steps of the meeting. Without it, you might be missing the point.

With all the issues handy in a list (this can be tracked in your Google sheets), meeting attendees should vote on the top 3 priorities and focus on tackling them in the meeting —starting with the most important issue first.

Once solved, take it off the list. Likely, the solution will result in some to-dos, so make sure to add those to your to-do list as needed. If issues are on the agenda for more than a few weeks, drop them to a long-term list to be discussed on a quarterly basis.

Wrap up (5 minutes)

This is the final stretch of the meeting! 5 minutes before the end time (and no later!), take some time to review the following three things before everyone parts ways:

- Recap the to-do list and next steps from your meeting.
- Discuss if there are any cascading messages that need to be communicated to the rest of the organization.
- Rate your meeting. The ideal is to receive ratings of 8 or higher. If it's lower, ask why so you can course-correct for next time.

NEED HELP?

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