



ARIZONA
SMALL
BUSINESS
BOOT CAMP &
COLLECTIVE



TRACTION POINT

RESPOND → PLAN → RETURN STRONGER

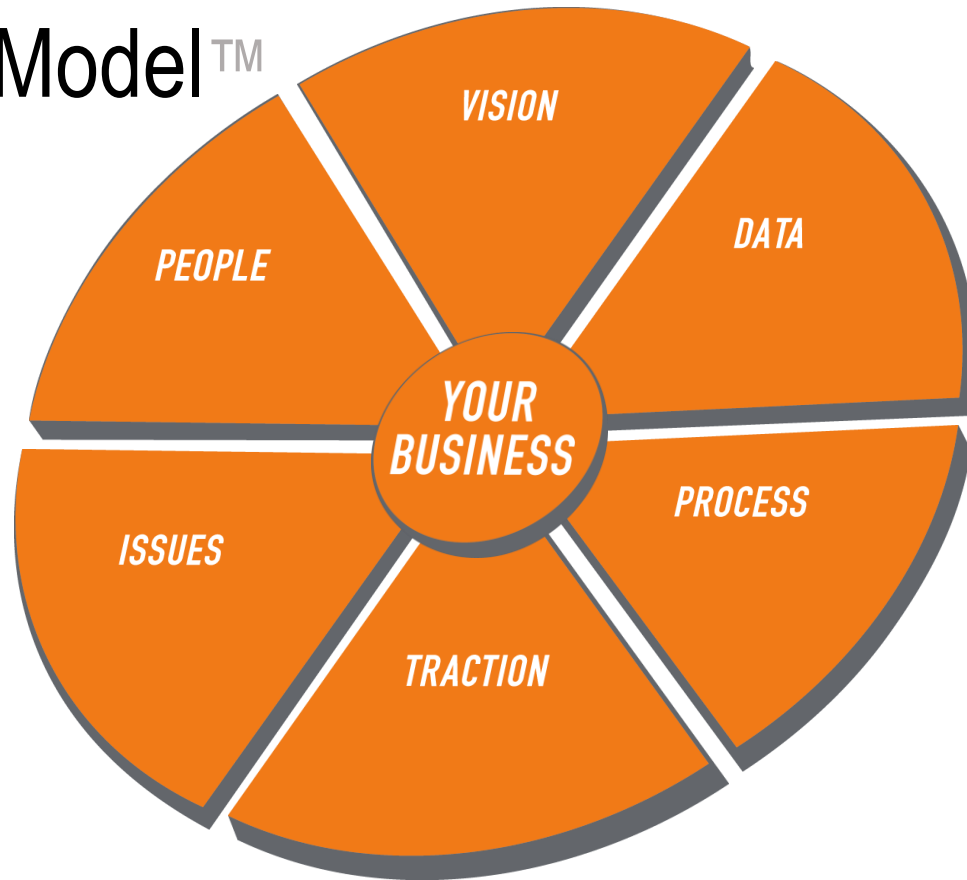
Using Data Driven Strategies to Run Your Business

PRESENTED BY

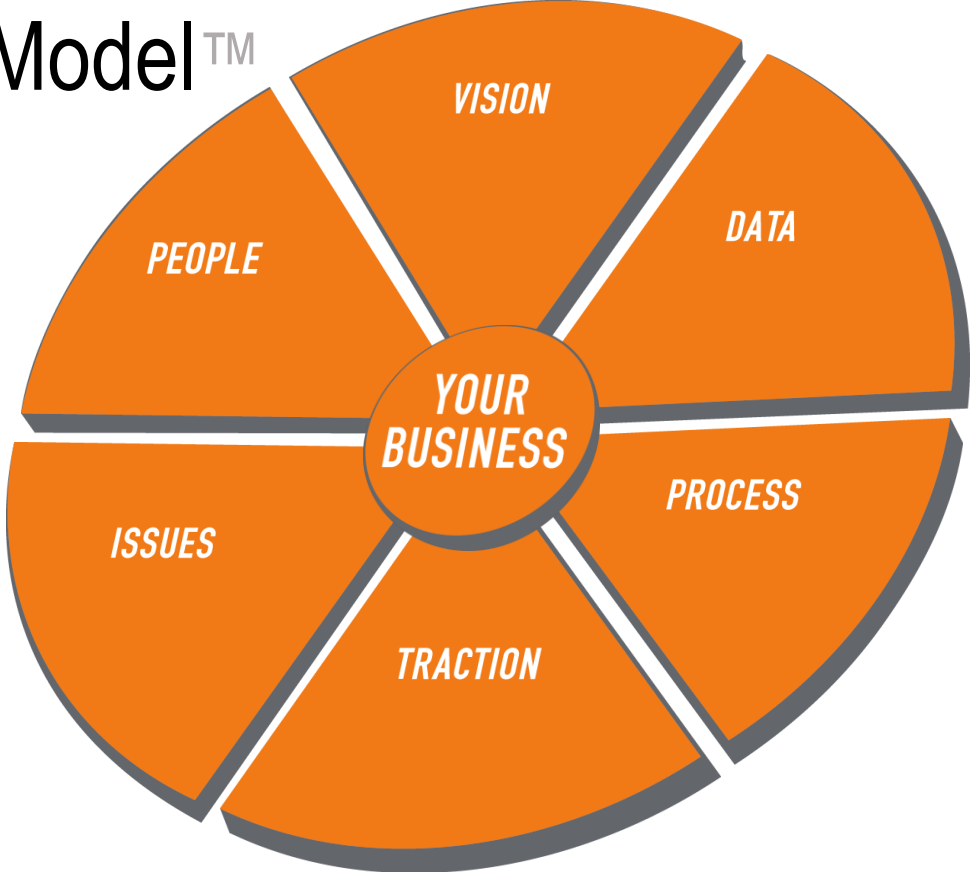
Chris Spear



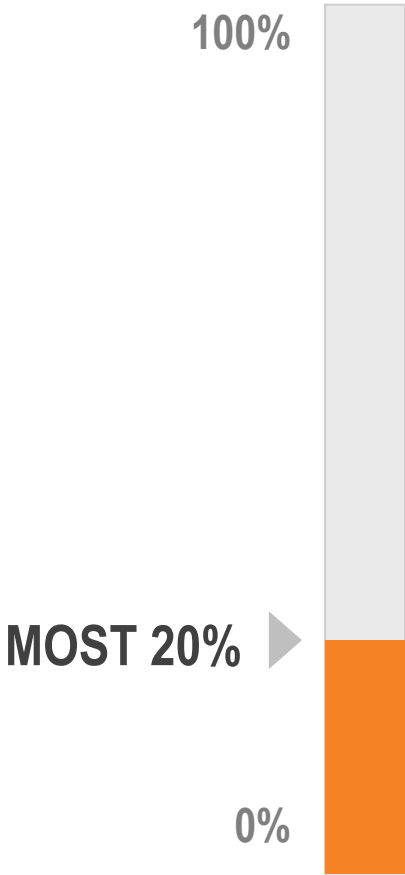
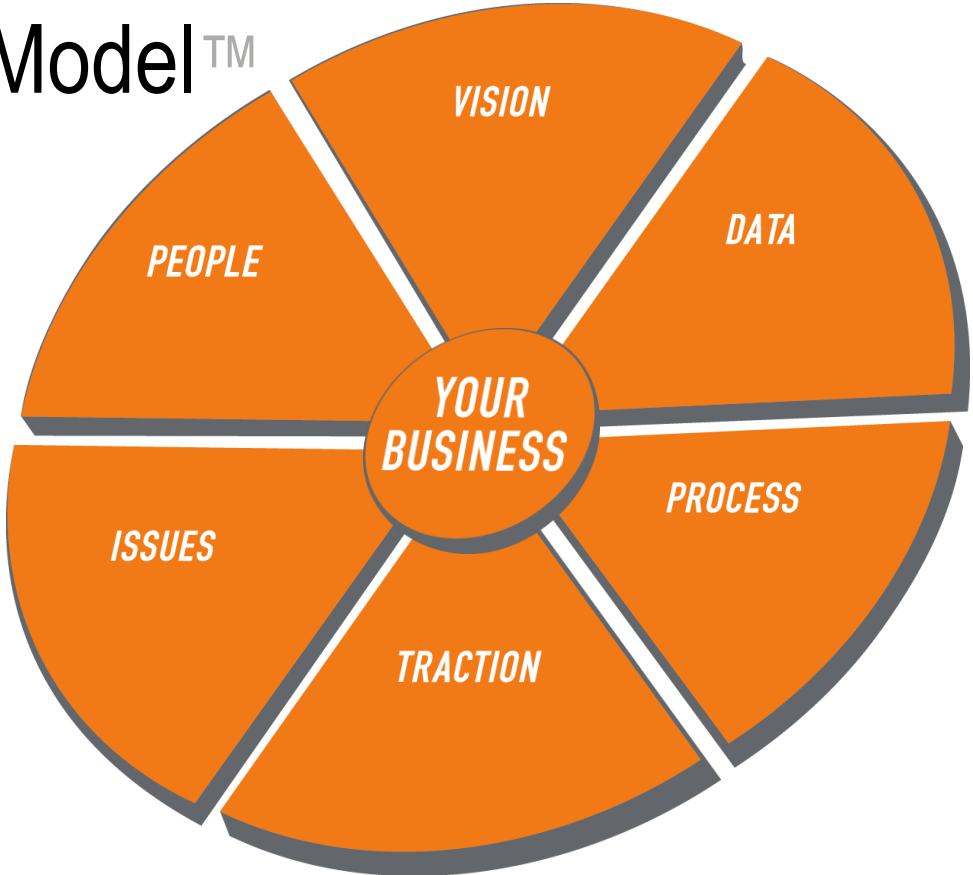
The EOS Model™



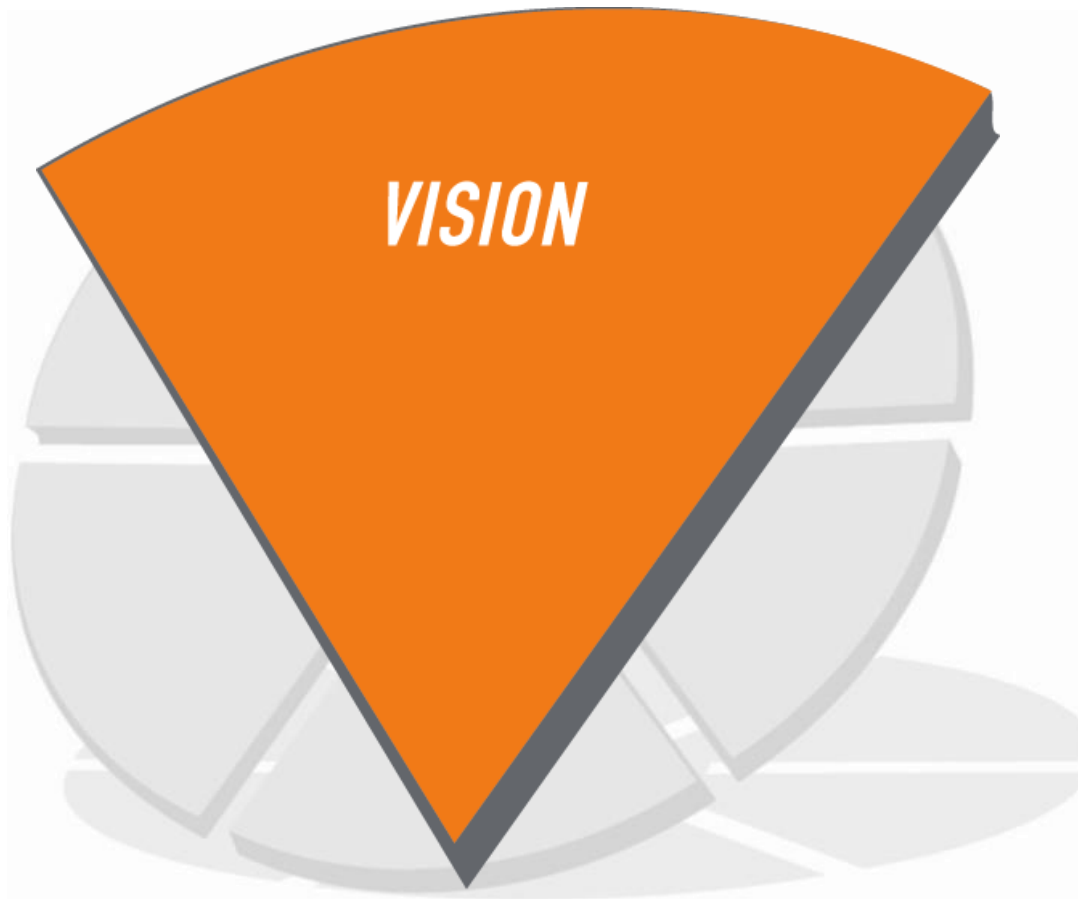
The EOS Model™



The EOS Model™



WHY do we care about KPIs in the first place?

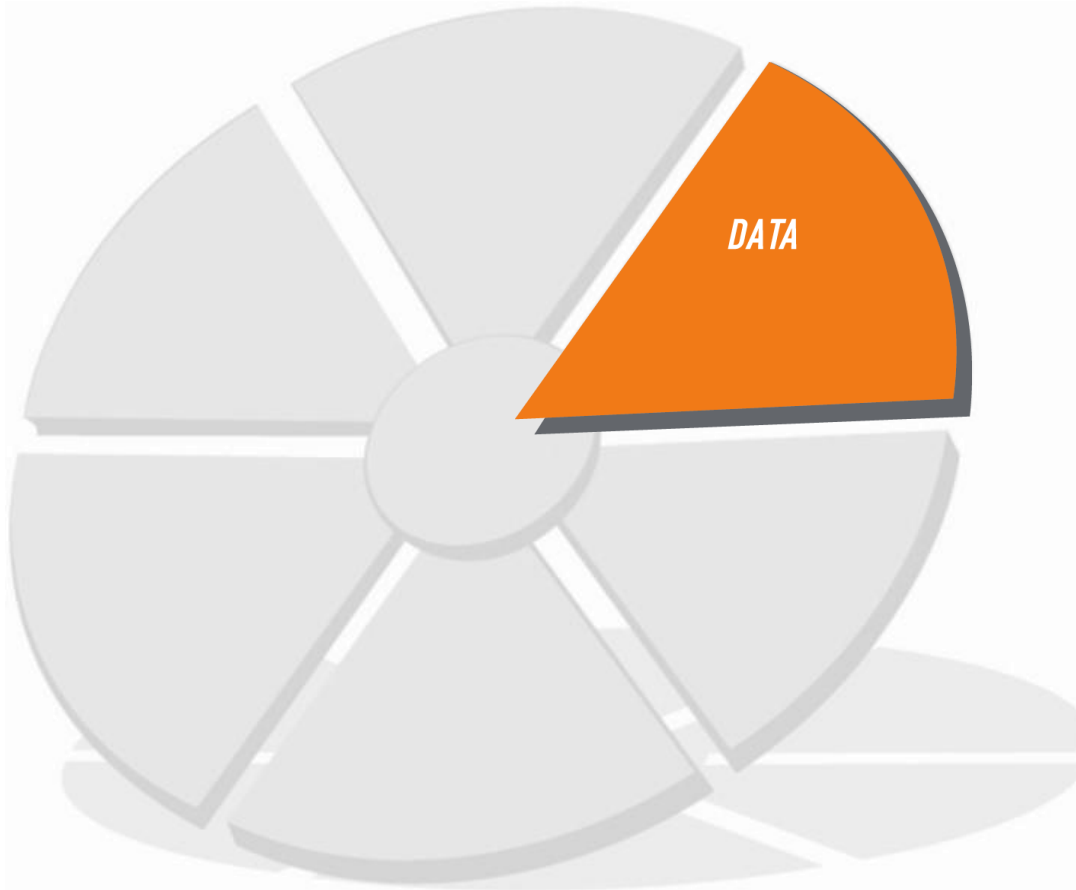


Are we making measurable progress toward our Vision?

The Vision/Traction Organizer™

CORE VALUES	1. 2. 3. 4. 5.	3-YEAR PICTURE™
	Purpose/Cause/Passion: Our Niche:	
CORE FOCUS™	<hr/> <hr/>	
10-YEAR TARGET™	Target Market/The List*: 3 Uniques™: 1. 2. 3. Proven Process: Guarantee:	

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><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.		<p>Future date: Revenue: Profit: Measurables:</p> <p>Rocks for the Quarter Who</p> <table border="1"> <tr><td>1.</td><td></td><td></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.			2.			3.			4.			5.			6.			7.			<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> <tr><td>8.</td><td></td></tr> <tr><td>9.</td><td></td></tr> <tr><td>10.</td><td></td></tr> </table> <p>Prioritize</p> <ul style="list-style-type: none"> • Identify • Discuss • Solve 	1.		2.		3.		4.		5.		6.		7.		8.		9.		10.	
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100% STRONG

DATA
- *Scorecard*

What do we
measure and
how do we
keep key
measures
visible?



Lead vs Lag Measures

I want to lose 5 lbs!

- 5 lbs. is the lag measure

What do I do to lose 5 lbs?

- Go for a half-hour walk 5 days a week
- Eat less than NN grams of carbohydrate 6 days a week
- Cut sugar intake every day this week
- Get 7 hours of sleep 5 days a week

Company 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 Revenue	>=\$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	Sales Calls	50	54	55	61	59	32	48	51	72	61	54	50	52	54
Robert	Sales Meetings	10	10	10	10	8	10	10	12	11	15	10	9	8	8
Robert	Proposal	5	5	5	6	5	6	5	6	4	5	8	6	5	5
Robert	Closed Business	2	2	3	6	3	2	3	5	3	2	1	2	8	4
David	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
David	Errors	<=4	3	2	2	2	2	1	2	3	0	0	0	2	1
John	Utilization/Capacity	>75%	75%	76%	75%	75%	75%	75%	75%	82%	75%	75%	78%	75%	75%





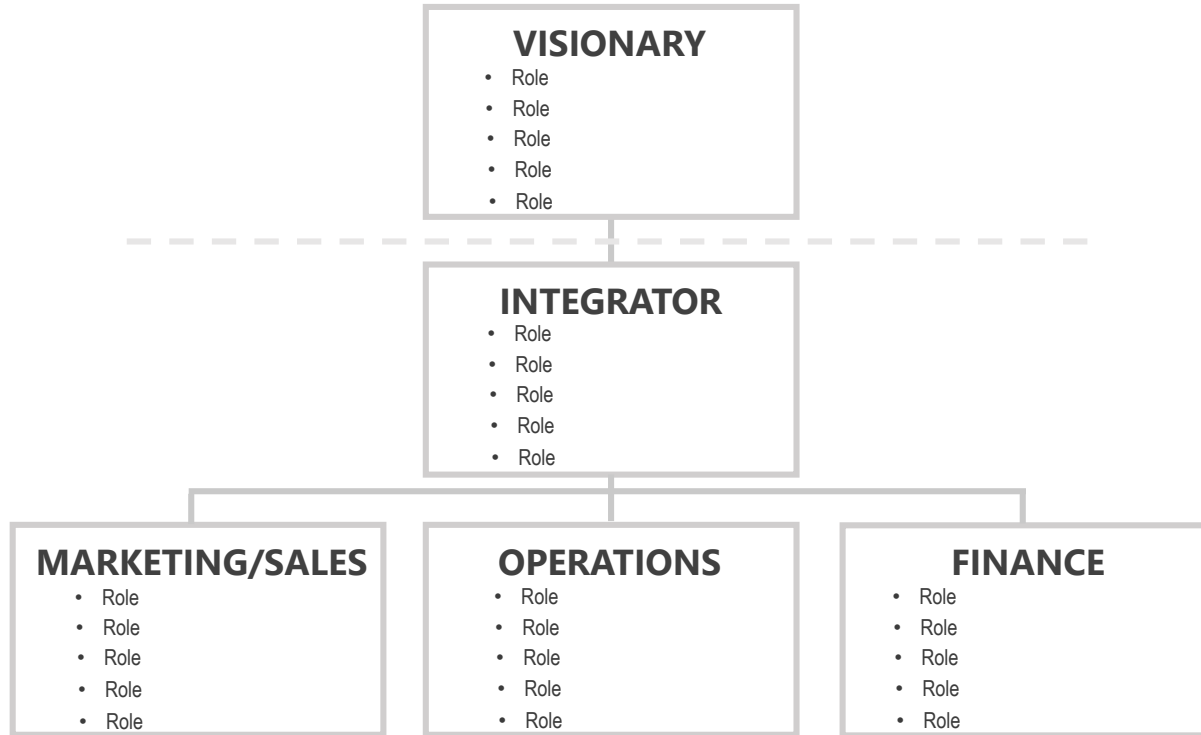
PEOPLE

- Right People*
- Right Seats*

How do we
quantify the
contribution
people are
making
toward
achieving the
Vision?



The Accountability Chart



Lead Measures That Align

MARKETING/SALES

- Role
- Role
- Role
- Role
- Role

OPERATIONS

- Role
- Role
- Role
- Role
- Role

FINANCE

- Role
- Role
- Role
- Role
- Role

- New leads
- Opportunities
- Sales calls
- Proposals
- Page views
- Clicks
- Walk ins / call ins
- Info requests
- Web conversions

- Run rate or Units/hr
- Errors
- Customer complaints
- Defect rate
- Customer rating
- Warranty claims
- Unbillable hours
- Cost/unit
- Utilization rate

- Weekly revenue
- Cash balance
- A/R
- A/R > 45 or 60
- A/P
- YTD GP
- Employee sat.
- System uptime
- Open positions





PROCESS

Are our
processes
working to
deliver the
brand
experience
we desire?



Handful of Core Processes

- People
- Marketing
- Sales
- Operations
- Operations
- Customer Service
- Accounting



PROCESS
- Documented

20/80



100% STRONG

PROCESS

- *Documented*
- *Followed By All*

We can
measure
process
adherence,
cycle time,
quantity,
quality...



100% STRONG

ISSUES

- *Issues List*
- *IDS*

When
measures are
“off-track” we
put them on
the issues list
so we can IDS



Issues Solving Track

Identify

Discuss

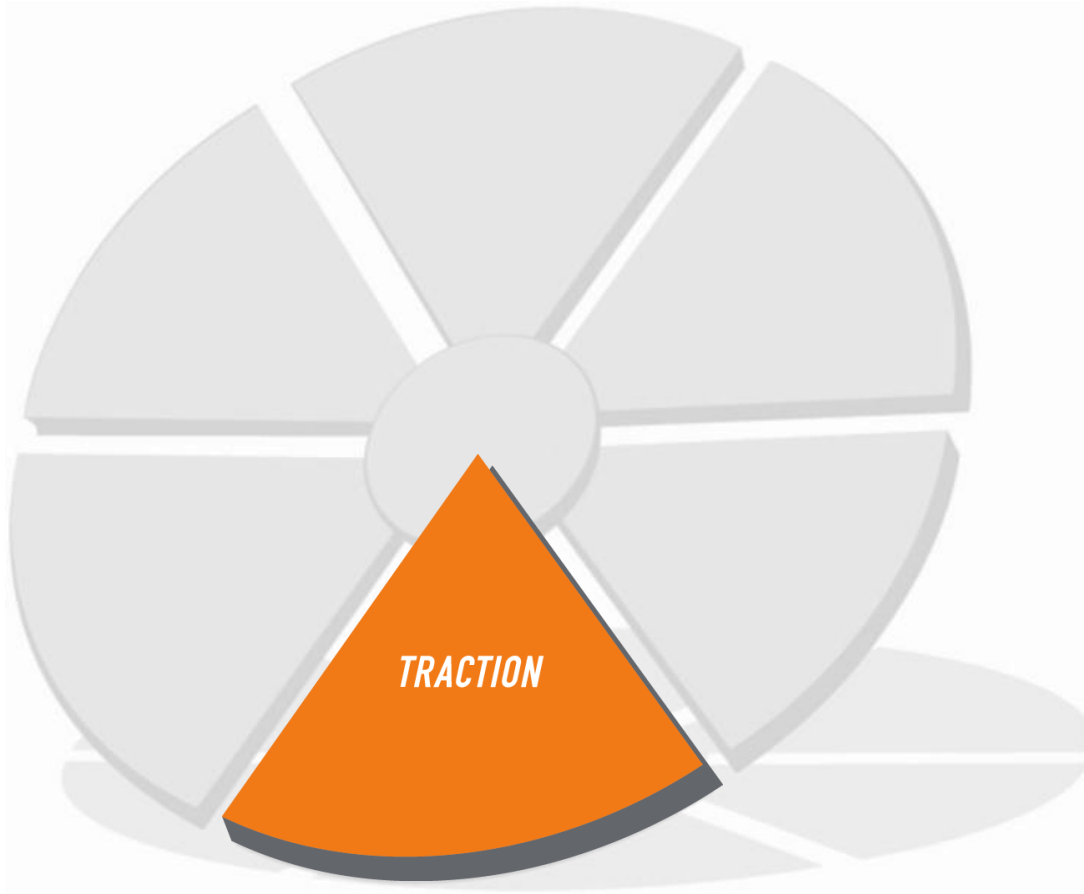
Solve

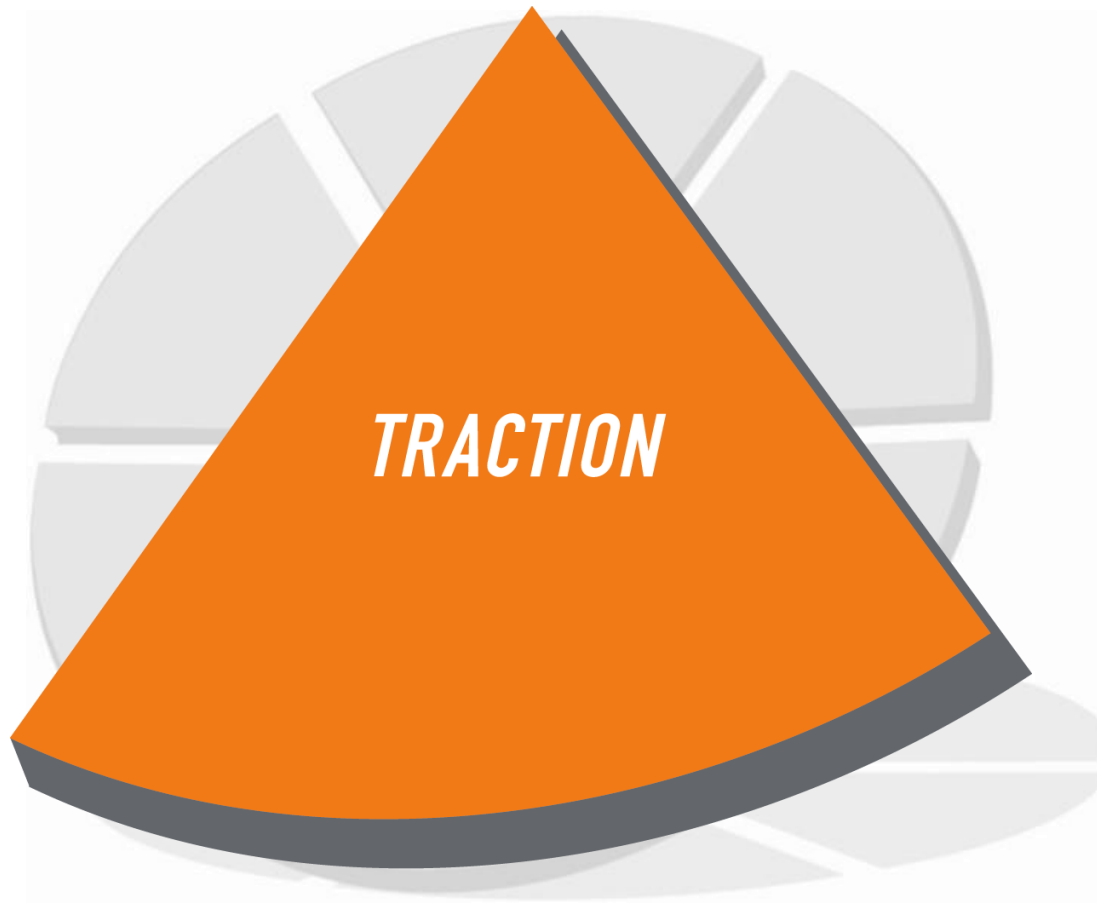


ISSUES LIST

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.		







**When and
where do we
see our Data?**

100% STRONG



TRACTION
- *Rocks*
- *Meeting Pulse*

Level 10 Meeting TM

- Good News 5 Minutes
- Scorecard 5 Minutes
- Rock Review 5 Minutes
- Customer & Employee Headlines 5 Minutes
- To Do List 5 Minutes

Placeholder text for the To Do List item.

- Issues List/IDS 60 Minutes

Placeholder text for the Issues List/IDS item.

- Conclude 5 Minutes

The 7 Truths

- What gets measured gets done
- Managing metrics saves time
- A scorecard gives you a “pulse” and the ability to predict
- You must inspect what you expect
- You CAN have accountability in a culture that is high trust and healthy
- A scorecard requires hard work, discipline and consistency
- One person must own it

The 6 Fundamentals

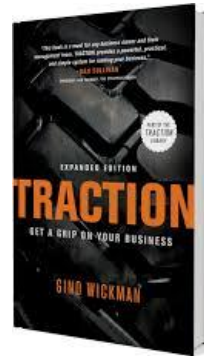
- Review weekly with your leadership team
- 5-15 numbers
- Someone is accountable for each measurable
- There is a goal for each measurable
- If the goal is not hit, you “drop it down”
- 13 weeks at a glance (see patterns and trends)

100% STRONG



Offer

Drop your name, address and email
in the chat and I'll send you
a copy of the book TRACTION.



**What questions
do you have?**

Chris Spear

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Certified EOS Implementer

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