

HI! IT'S ME, HI.... I'M THE PROBLEM, IT'S ME!





HOW EOS CHANGED MY BUSINESS & ME!

**WHO HERE IS THE
PROBLEM?**



PERFECTIONIST



CONTROL FREAK



EOS

ENTREPRENEURIAL OPERATING SYSTEM



3 COMPONENTS FOR SUCCESS



1. IMPLEMENTER



2. VISIONARY OR INTEGRATOR



3. LEADERSHIP

TEAM



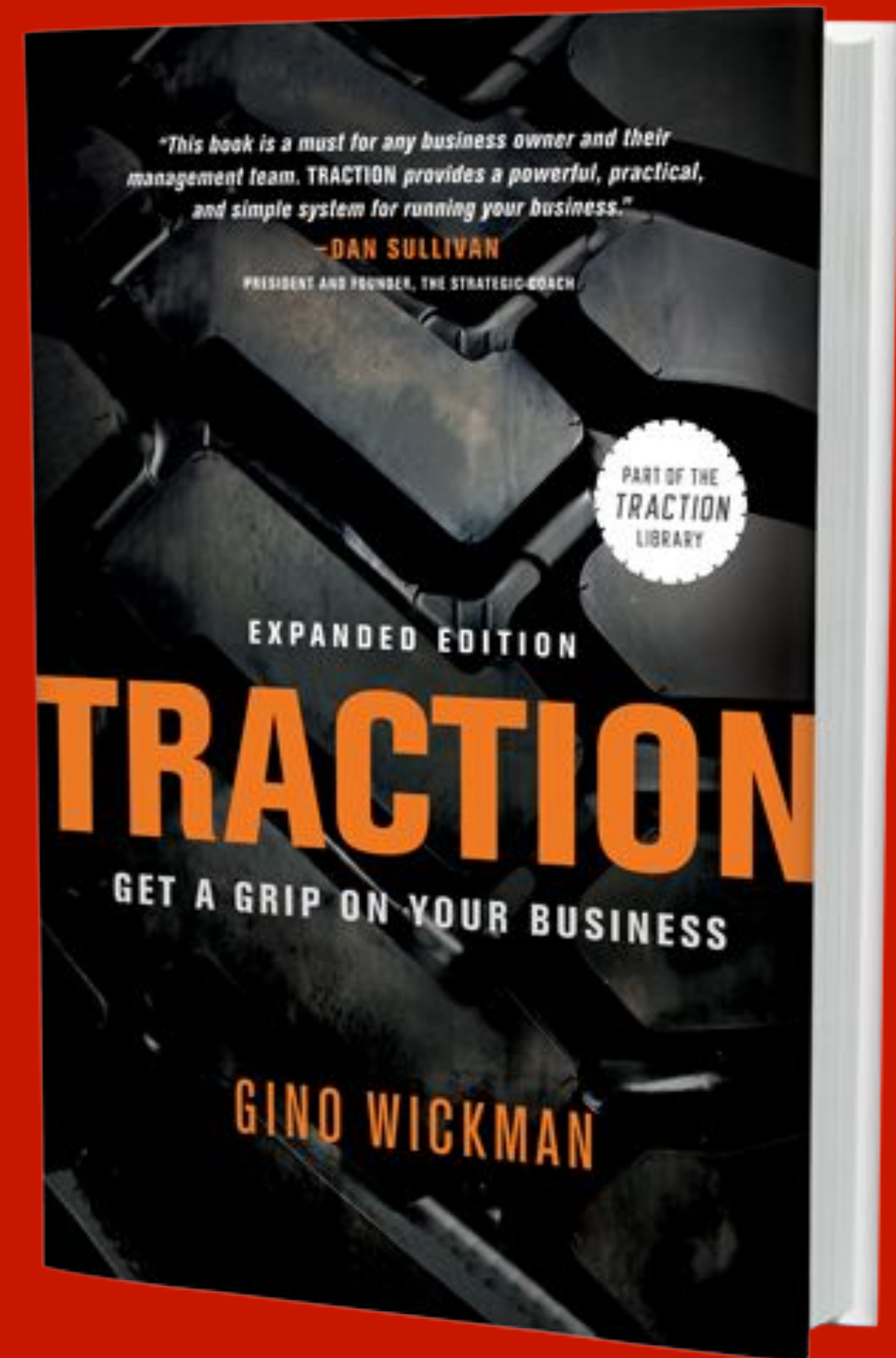


Gino Wickman

@Gino Wickman

"If you're truly going to commit to building a great company, a strong leadership team, and getting the right people in the right seats, you must prepare for change on your leadership team."

#leadership



4. OWNER?



HOW MUCH?





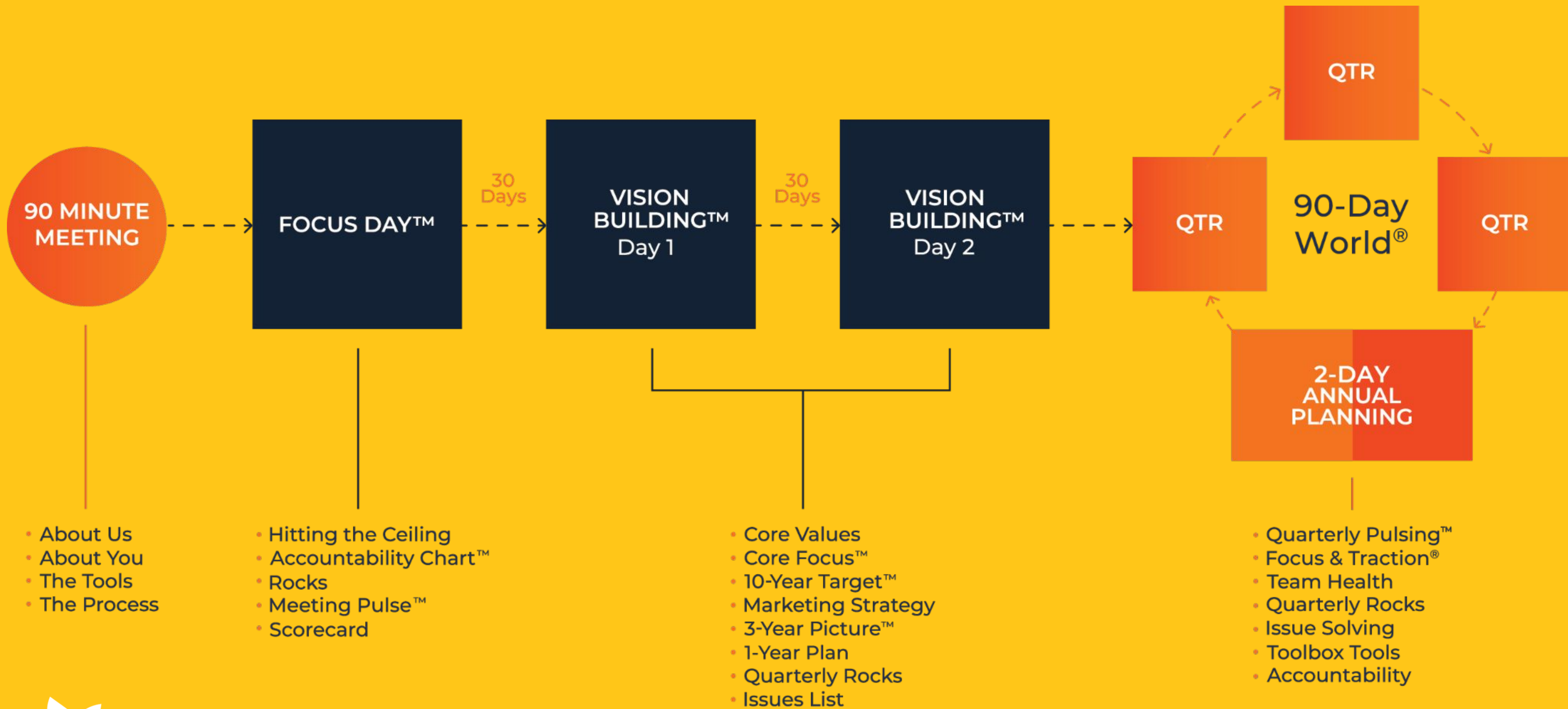
BILL HUETER
EOSWORLDWIDE.COM



JONATHAN MAYNARD
COMPANY180.COM

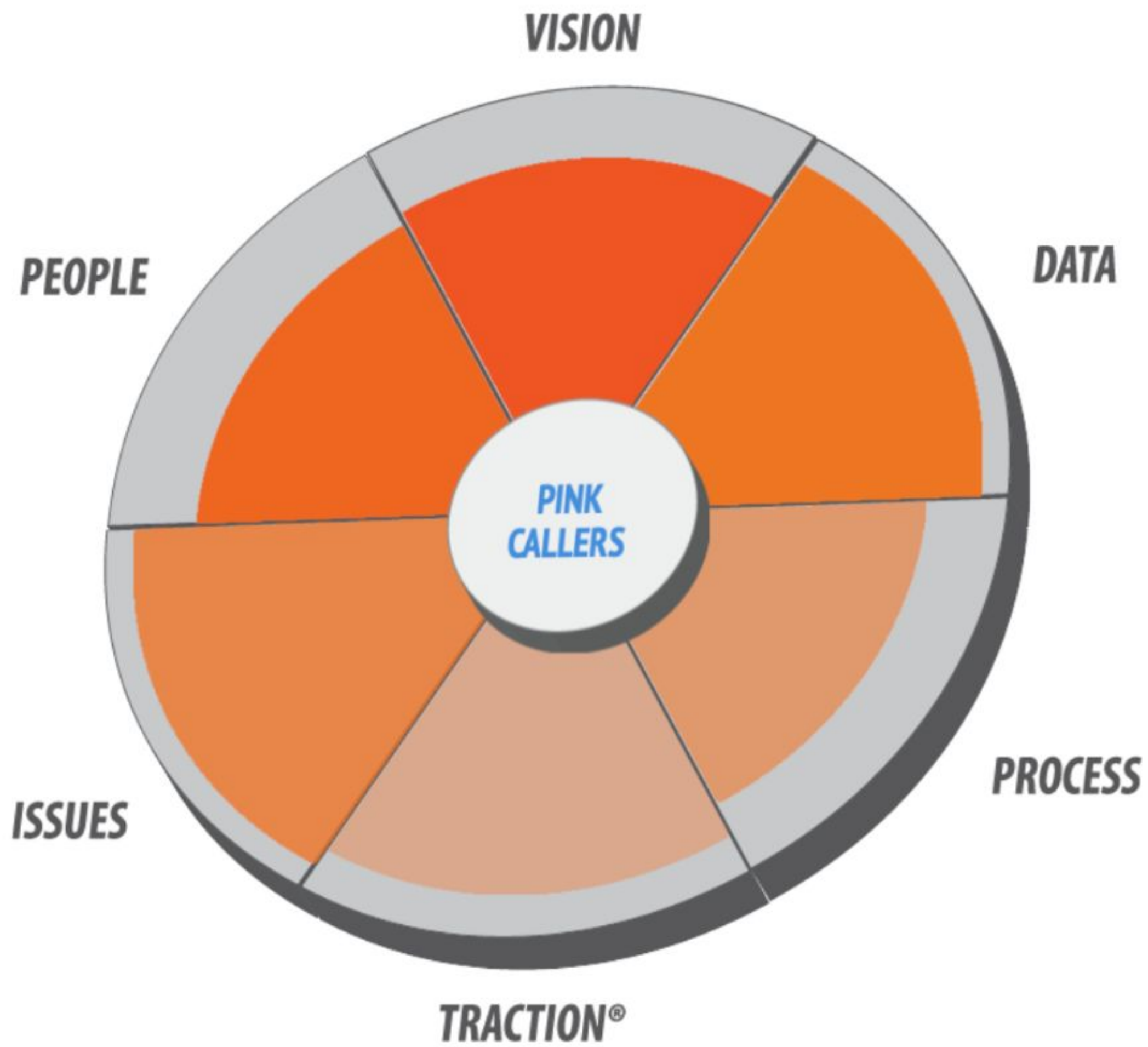
WHAT'S NEXT?





1. ORGANIZATIONAL CHECK-UP





CURRENT
TOTAL SCORE

81



 [VIEW ANSWERS](#)



View
Previous
Campaign
Results



Share
Report



YOUR ROADMAP TO IMPROVING THE STRENGTH OF YOUR ORGANIZATION

To the extent that you can strengthen the Six Key Components™ (Vision, People, Data, Issues, Process, Traction®), your issues will begin to fall into place and the common frustrations that have been plaguing you will go away. Although it's nearly impossible to reach 100% in every component, achieving over 80% will turn your company into a well-oiled machine.

VISION PEOPLE DATA ISSUES PROCESS TRACTION

INTRODUCTION



RECOMMENDED READING



Traction by Gino Wickman
Inside Traction, you'll learn the secrets to strengthening the Six Key Components™ of your business.
[Read Chapter 7: The Process Component](#)

EOS TOOLS



3-STEP PROCESS DOCUMENTER™
[Download](#)

This tool helps you document your organization's Core Processes at a high level to help create consistency and scalability in your business.

[Download the 3-Step Process Documenter and use it to document your Core Processes.](#)

Your organization is 74% strong in the Process Component

To strengthen the Process Component™ you must "systemize" your business to create consistency and scalability -- first, identifying and documenting your core processes, then ensuring that they are followed by all.

Watch this video to learn what it looks like to be 100% strong in the Process Component.


RECOMMENDED NEXT STEPS:


- ✓ Use the 3-Step Process Documenter to **document** and simplify your Core Processes:
 - *Work with your leadership team to identify your handful of Core Processes (see Traction – page 151)*
 - *One at a time, document and simplify each Core Process taking a high-level, "20-80" approach (a "checklist" vs. a 500-page SOP Manual)*
 - *Make sure your leadership team understands and agrees with each Core Process.*
 - *Package the Core Processes in a printed manual or an online repository – anywhere it can easily be found by everyone in your organization*
- ✓ Work to get each Core Process **Followed By All (FBA)**. (see Traction page 158):
 - *TRAIN every employee who performs one or more steps in the Core Process, ensuring everyone understands each step*
 - *MEASURE (with Scorecards and Measurables) to make sure people are doing things right, often enough, and getting the desired outcomes*
 - *MANAGE– when numbers are on-track, reward and recognize. When numbers are off-track, provide constructive feedback and support efforts to get them back on-track.*
 - *UPDATE each Core Process when necessary, checking annually to make sure it's right, as simple as possible, and consistently producing the desired results.*





2. VISION/TRACTION ORGANIZER





Pink Callers


My 90


Scorecard


Rocks


To-Dos


Issues


Meetings


V/TO™


Accountability Chart

1-on-1

Process

Directory

EOS Toolbox™

Provide Feedback

Vision/Traction Organizer™

FILTERS

Team: Leadership Team

Share V/TO™ with All Teams

Archive

Vision

Traction

SWOT

Core Values

1. Proactive

2. Transparent

3. Problem Solvers

4. Team Players

5. Leadership

Core Focus™

Purpose


To provide remote work opportunities that help home service busines


Niche


Custom admin solutions that transform home service businesses.


10 Year Target™


To be the recognized industry leader in custom admin solutions for ho


Pink Callers


My 90


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Provide Feedback

Settings

Collapse

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Go to Market Strategy

Target Market

Home service businesses in the HVAC, Plumbing, Tree Service, Electrical, and GC in North America with a minimum of \$750K in annual gross revenue, and at least 5 employees + owner(s). They value the relationship with Pink Callers, balance experience with cost, are early tech adopters using things such as Slack and Trello, and favor automation. They also use Service Titan, Housecall Pro, Jobber, Single Ops, or Builder Trend as a CRM, and Ring Central, Dial Pad, Phones Pro, or another phone system that produces metrics. Their staff members are great communicators both Internally and externally, are coached, and seek our advice. And they respect our operating hours of M-F, 8-5 in all time zones.

Attachments

3 Uniques

Use Client Software to Action Incoming Leads

Imbed Internal Systems for Communicating and Documenting Client Workflow


Match Clients w/One Fully Trained and Managed CSR

Proven Process:

At Pink Callers, we have developed a proven process that sets us apart as a leading provider of administrative services. Our process begins with a comprehensive assessment of your specific needs and goals. Through open communication and collaboration, during our 3 day on-boarding period we gain a deep understanding of your business requirements, enabling us to tailor our services to your unique demands.

Guarantee:

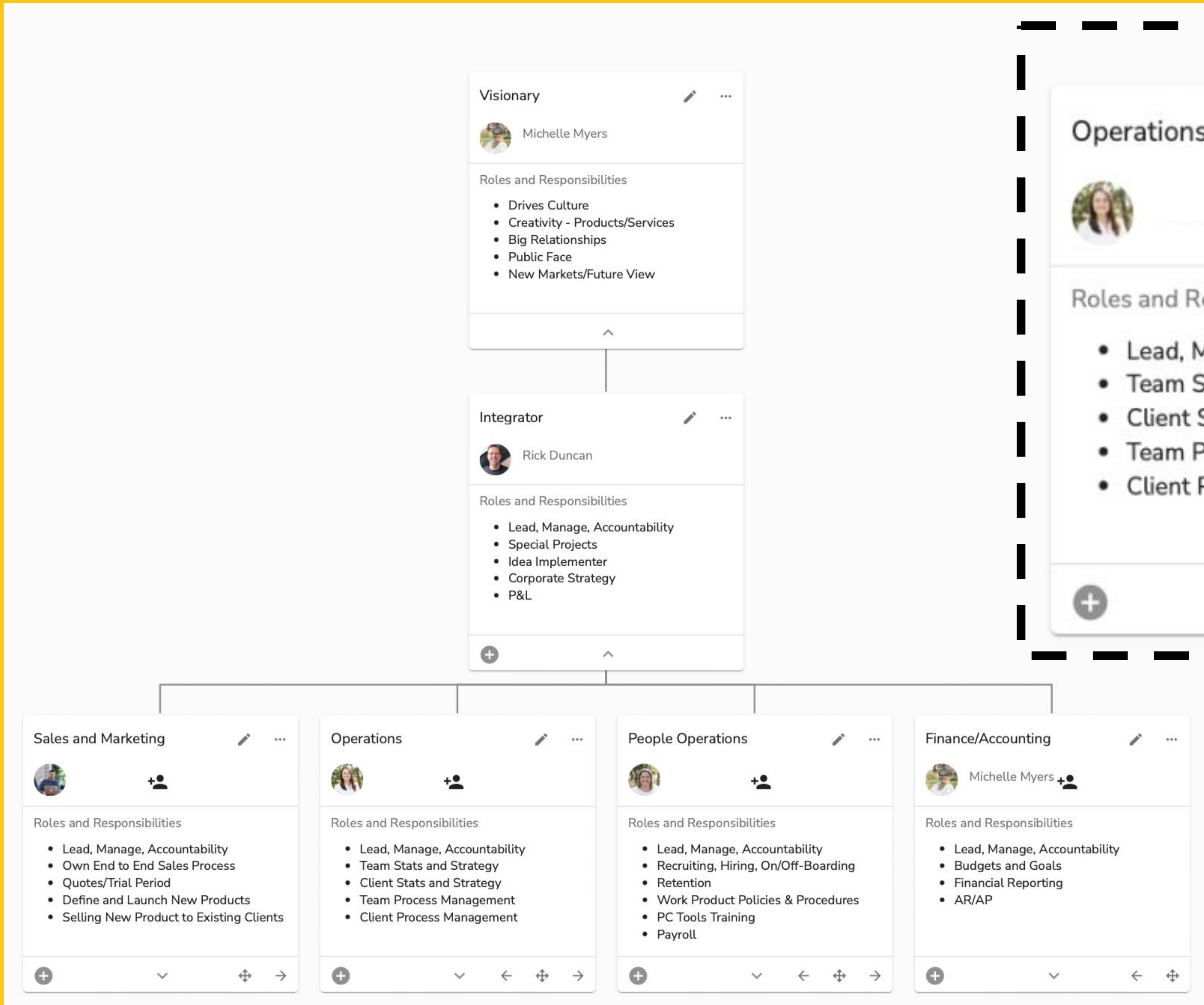
At Pink Callers, we stand behind our services with a solid guarantee. If you're not fully satisfied with our administrative support, we will work tirelessly to address any issues and ensure your complete satisfaction, and offer a 100% refund if you are not completely satisfied. Your success is our top priority.




3. ACCOUNTABILITY


CHART





Operations



+ 

Roles and Responsibilities

- Lead, Manage, Accountability
- Team Stats and Strategy
- Client Stats and Strategy
- Team Process Management
- Client Process Management

+

▼

←

↕

→

4. ROCKS



Status

Title



Increase retention of Clients beyond one year



**DIGITAL
VERSION**



LEADERSHIP TEAM MANUAL

WWW.EOSWORLDWIDE.COM



5. HOW MUCH?



**WE FOUND AN
INTEGRATOR**





RICK DUNCAN
FRACTIONAL-INTEGRATORS.COM



L10 MEETINGS



1. HEADLINES & ISSUES



Short-Term

Title

#

Owner



1. End of Day Forms



2. Pay for Performance for Leadership Team



3. Ram wants in-house training instead of remote service



4. Delegation Workflows/Documentation



5. Dispatch Model Clarity



6. CSR PTO standards in year one











7. Mac Usage - Leadership Team



2. SCORECARD

KPI'S



	Clients in Queue	≥ 4
	Contact Forms submissions	≥ 4
	On-Boarding Quote Paid	≥ 1
	Outbound emails opened	≥ 100 %
	Zoom Meetings Done	≥ 4
	Amount of OT submitted on payroll	≤ 1
	Employees with Negative Sick/PTO	$= 0$
	How much PTO/Sick Time was used for payroll	≥ 0 and ≤ 74



3. I-D-S

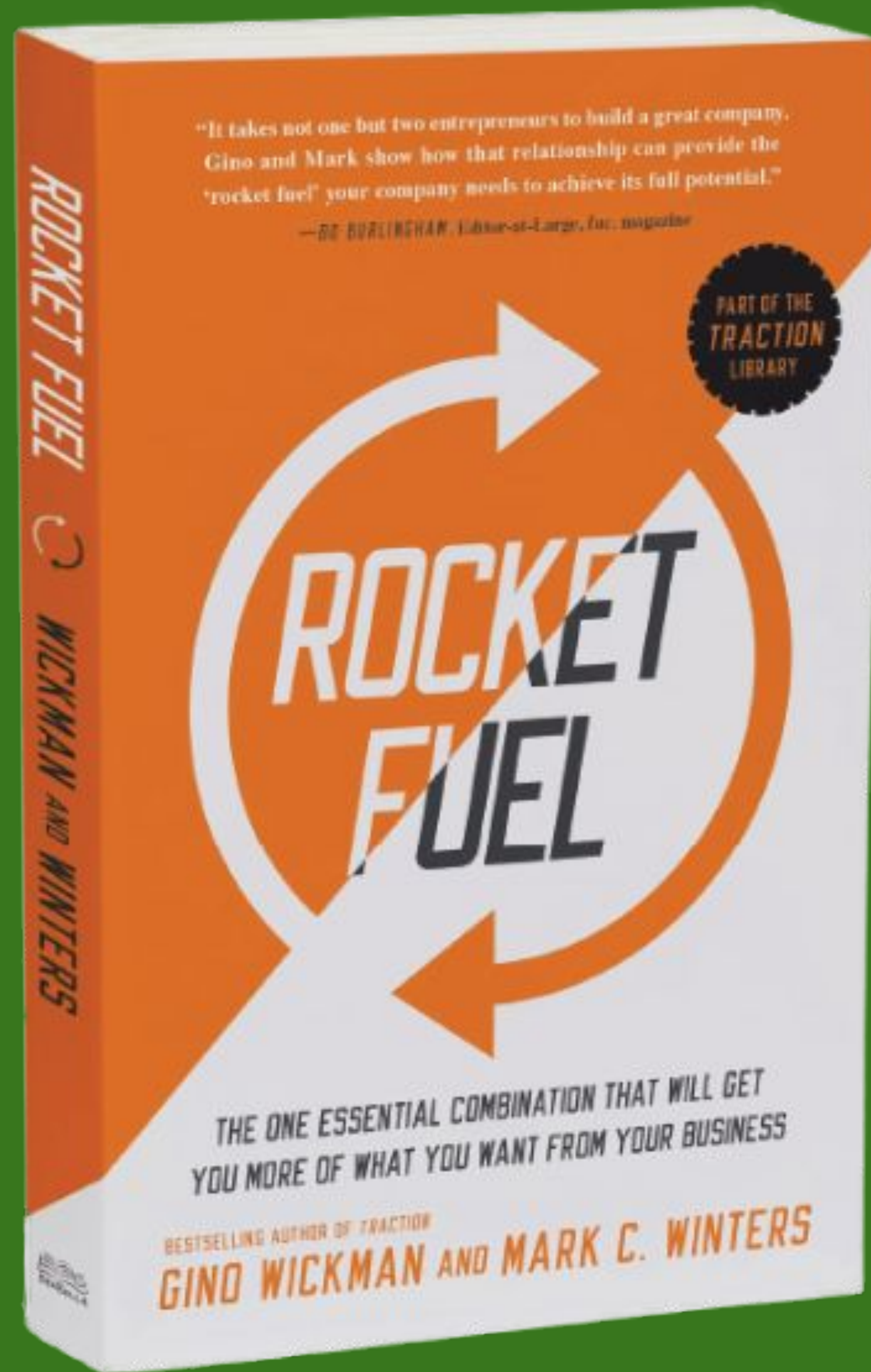


4. PROCESSES

DOCUMENTED &

FOLLOWED BY ALL





**VISIONARIES HAVE
GROUNDBREAKING
IDEAS. INTEGRATORS
MAKE THOSE IDEAS A
REALITY**



5. HOW MUCH?



SO WHAT?



TRACTION







pinkcallers.com/AHR

PLOT TWIST





CLOSE YOUR EYES



**ACCOUNTABILITY =
BUBBLE WRAP**



**THEY ALL SELF
SELECTED OUT**

(EXCEPT 1)



**ACCOUNTABILITY =
TRANSPARENCY**



ACCOUNTABILITY SET THE STAGE



**ACCOUNTABILITY
= SPEED OF TRUST**



**“WE MAKE A LIVING BY WHAT WE GET,
WE MAKE A LIFE BY WHAT WE GIVE...”**

WC





✿ (703) 945-9565 pinkcallers.com/AHR