NASHVILLE
FENCE TECH & METAL fab 2024
NOMMA
AFA
Pinnacle
Control Freak...
How EOS Changed my Business
AFA

Michelle L. Myers

Founder
Pink Callers

Pink CALLERS

CONTROL
FREAK

CONTROL
FREAK

WHO HERE IS THE PROBLEM?

PERFECTIONIST

CONTROL FREAK

EOS

ENTREPRENEURIAL OPERATING SYSTEM

3 COMPONENTS FOR SUCCESS

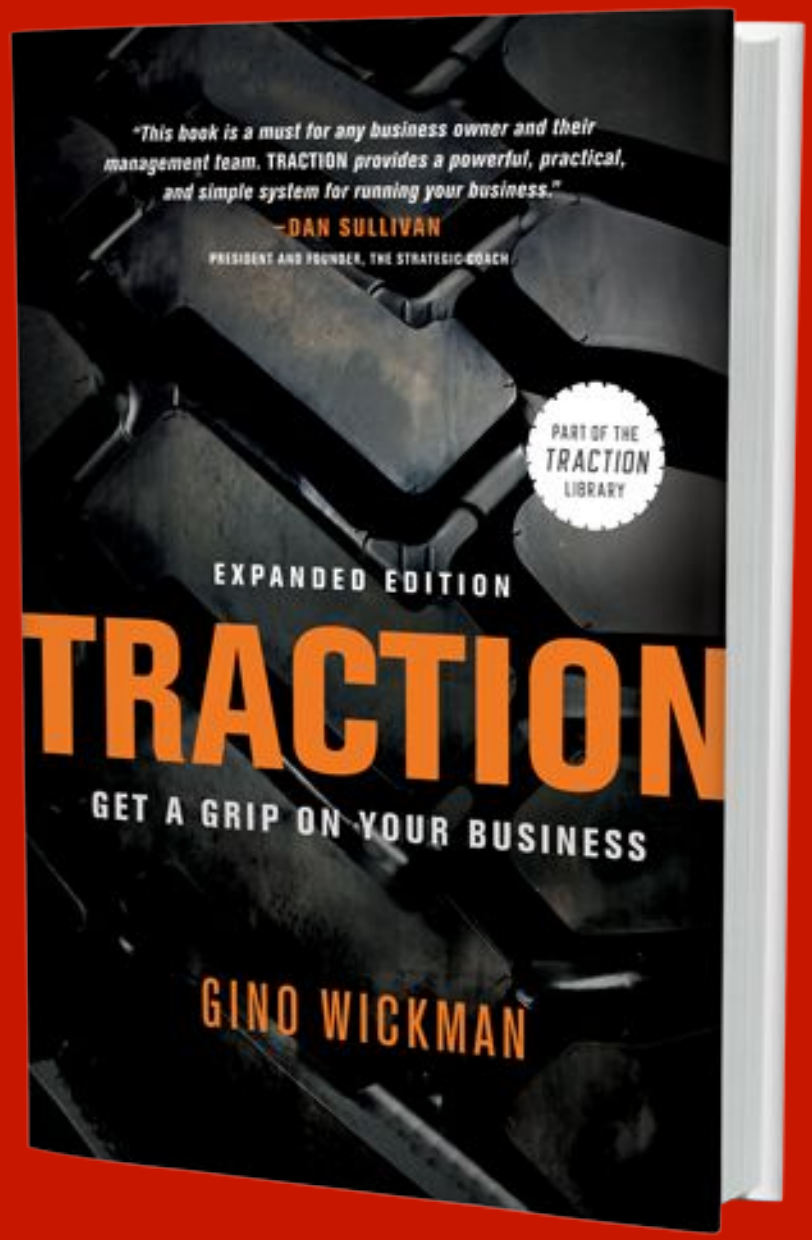
1. IMPLEMENTER

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



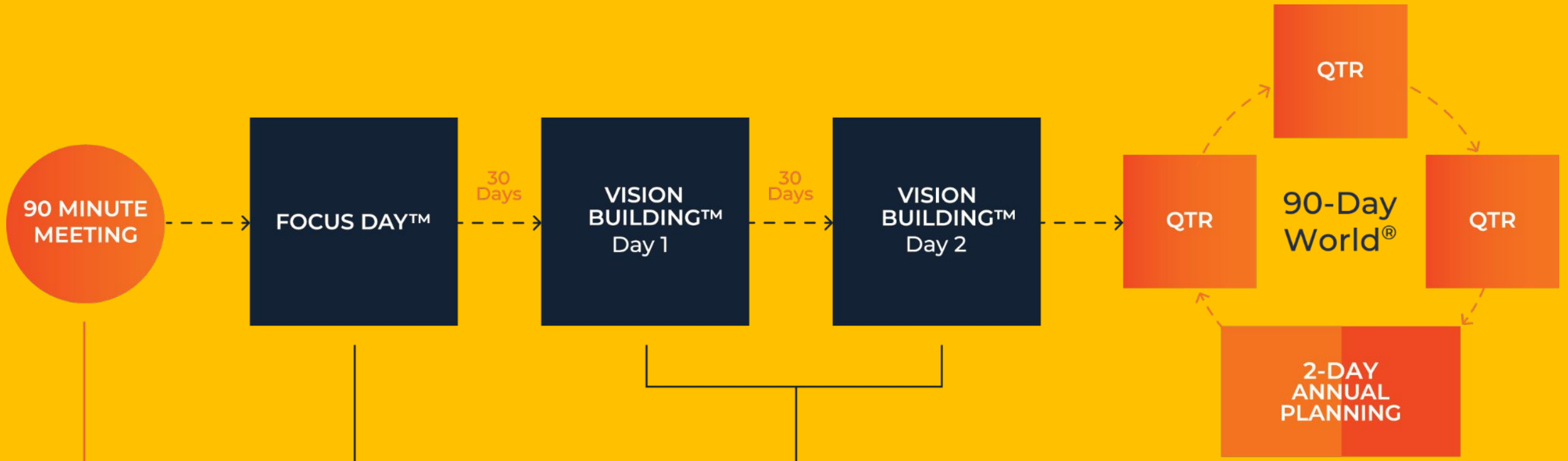
4. OWNER?

HOW MUCH?

BILL HUETER
EOSWORLDWIDE.COM

JONATHAN MAYNARD
COMPANY180.COM

WHAT'S NEXT?



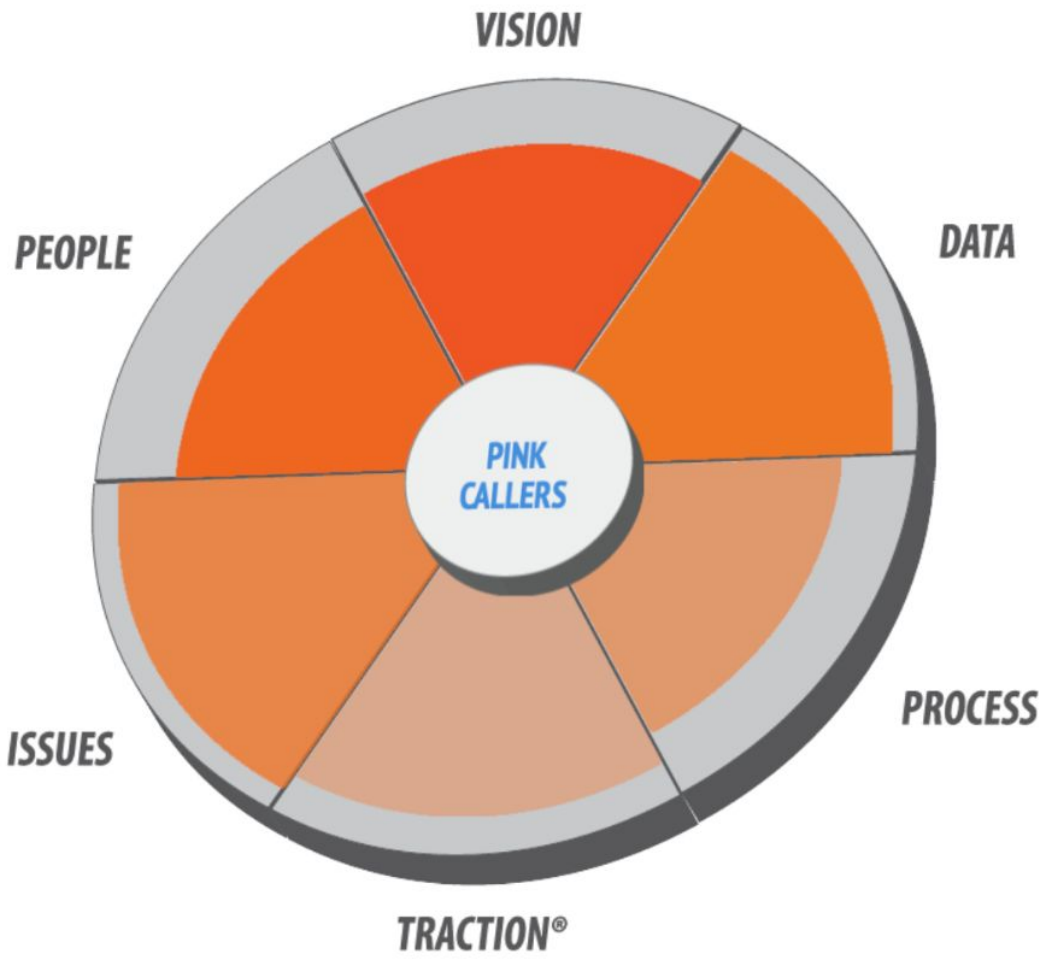
- About Us
- About You
- The Tools
- The Process

- Hitting the Ceiling
- Accountability Chart™
- Rocks
- Meeting Pulse™
- Scorecard

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

- Quarterly Pulsing™
- Focus & Traction®
- Team Health
- Quarterly Rocks
- Issue Solving
- Toolbox Tools
- Accountability

1.ORGANIZATIONAL CHECK-UP



CURRENT TOTAL SCORE

81

Vision	76%
People	73%
Data	90%
Issues	92%
Process	74%
Traction	85%

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

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 READING

Traction by Gino Wickman
Inside Traction, you'll learn the secrets to strengthening the Six Key Components™ of you

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 consisten business.

Download the 3-Step Process Documenter and use it to document your Core Processes.

RECOMMENDED NEXT STEPS:

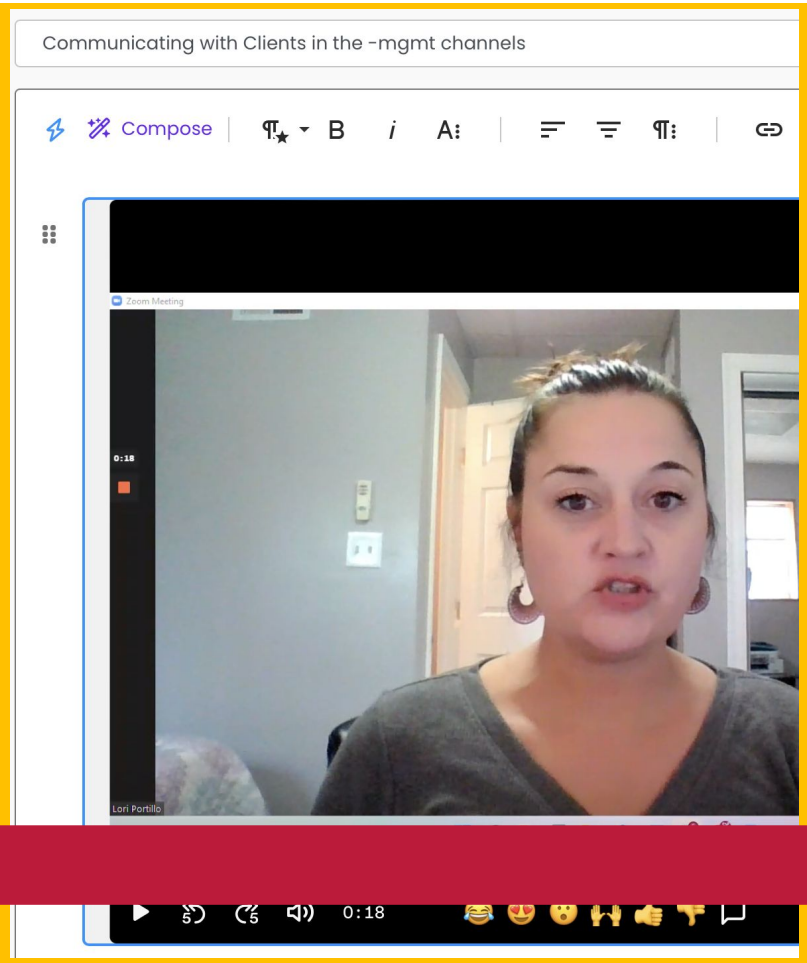
✔ Use the 3-Step Process Documenter to **document** and simplify your Core Processes:

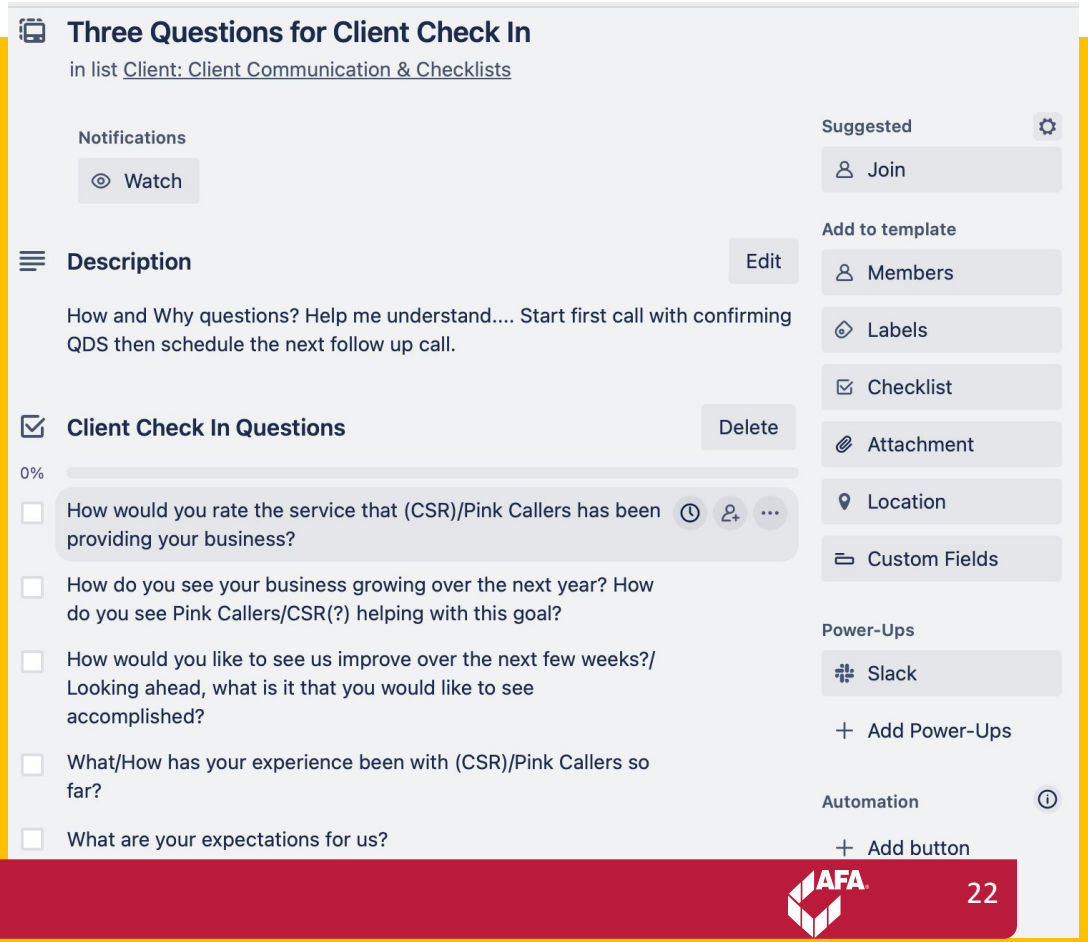
- *Work with your leadership team to identify your handful of Core Processes (see Traction – page 151)*
- *One at a time, document and simplify each Core Process taking a high-level, "20-80" approach (a "checklist" vs. a 500-page SOP Manual)*
- *Make sure your leadership team understands and agrees with 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):

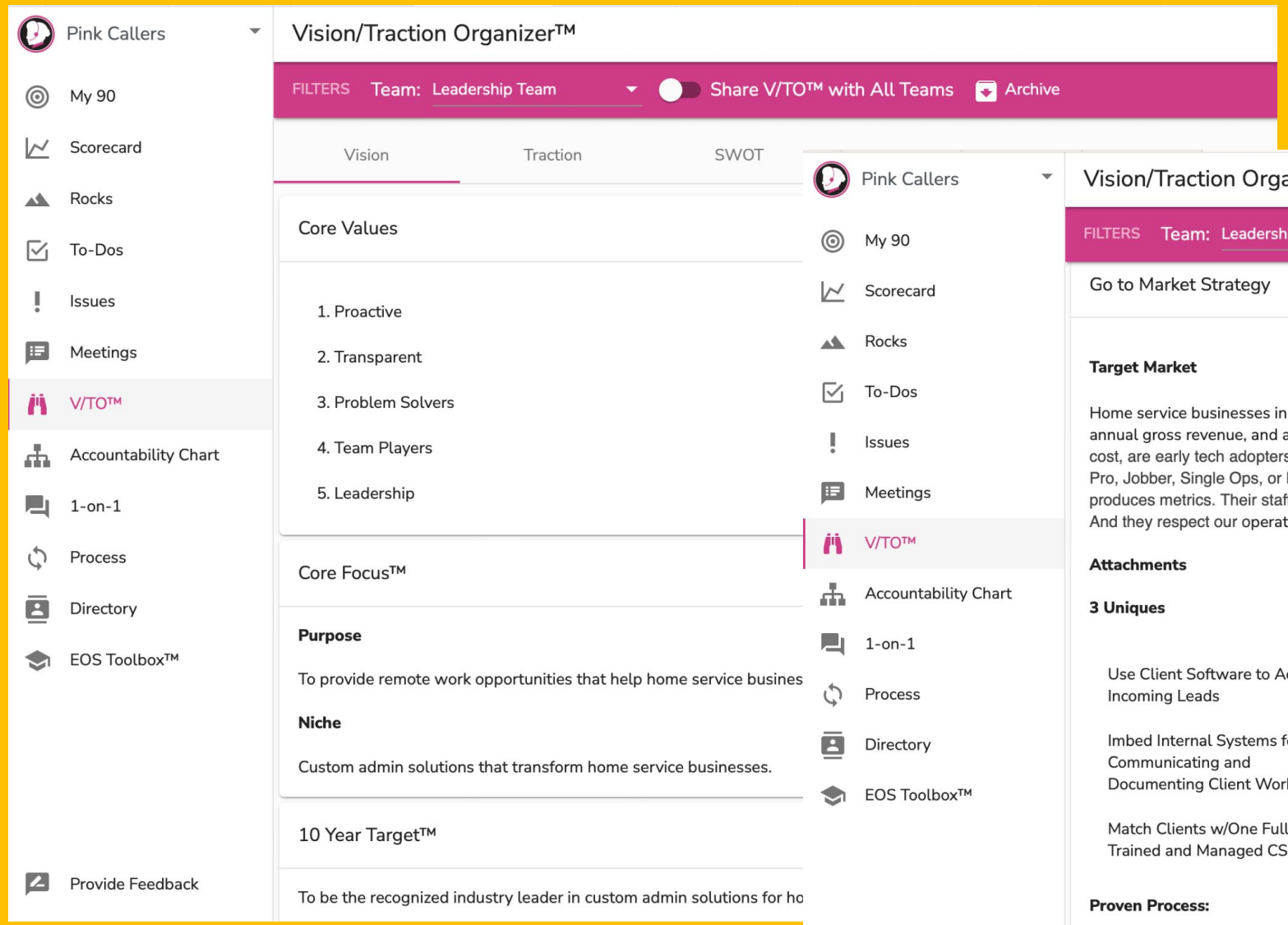
- *TRAIN every employee who performs one or more steps in the Core Process, ensuring everyone understands each step*
- *MEASURE (with Scorecards and Measurables) to make sure people are doing things right, often enough, and getting the desired outcomes*
- *MANAGE– when numbers are on-track, reward and recognize. When numbers are off-track, provide constructive feedback and support efforts to get them back on-track.*

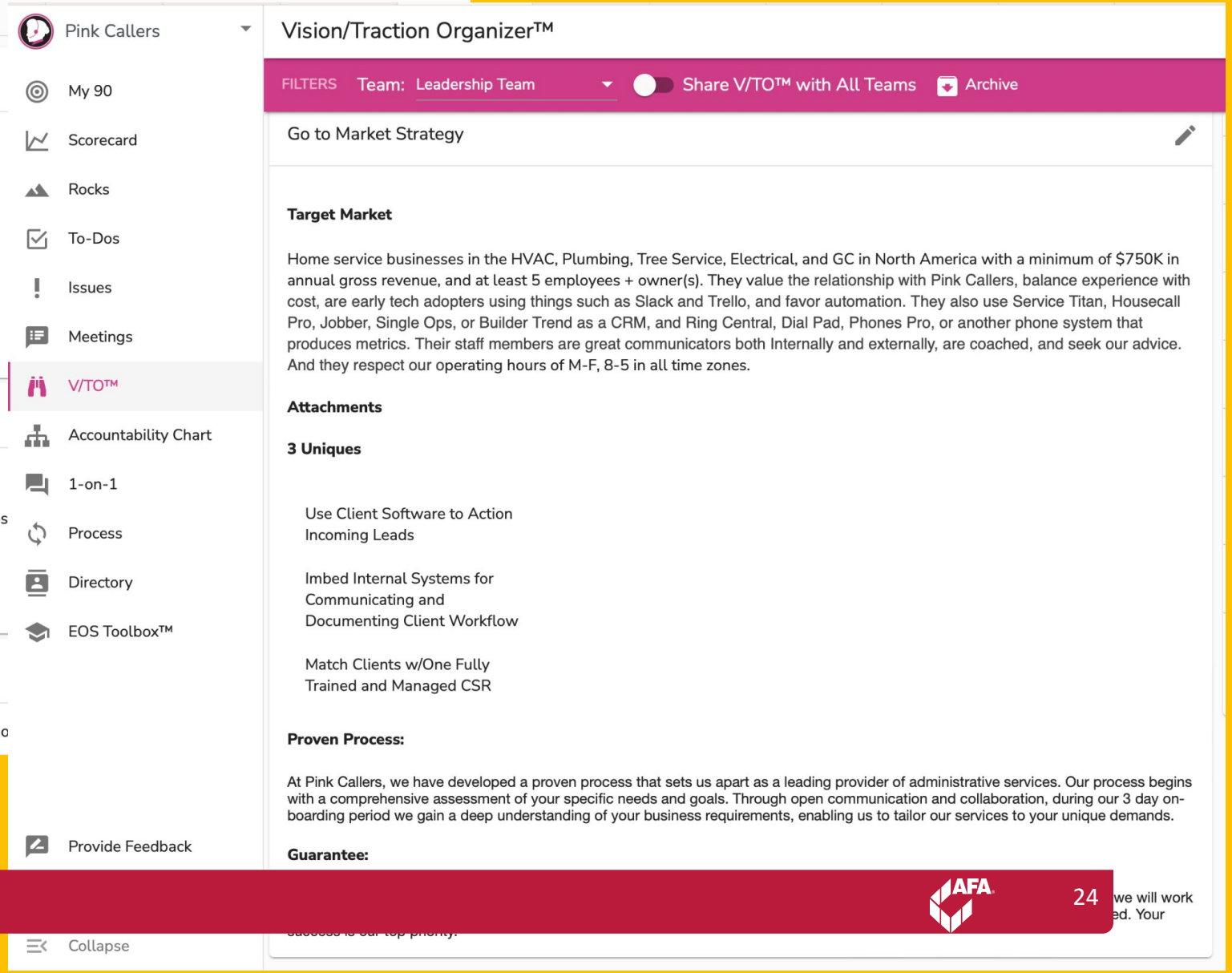
1. Simplify – Distill your core process down to its component pieces.
2. Write it Down – Take an initial stab at getting it documented.
3. Agree – Be relentless about simplifying it and ensure that all of the stakeholders agree and align.
4. Train – Teach your company the process to ensure it is followed by all.
5. Measure – Trust your team to follow the process, but verify their compliance.





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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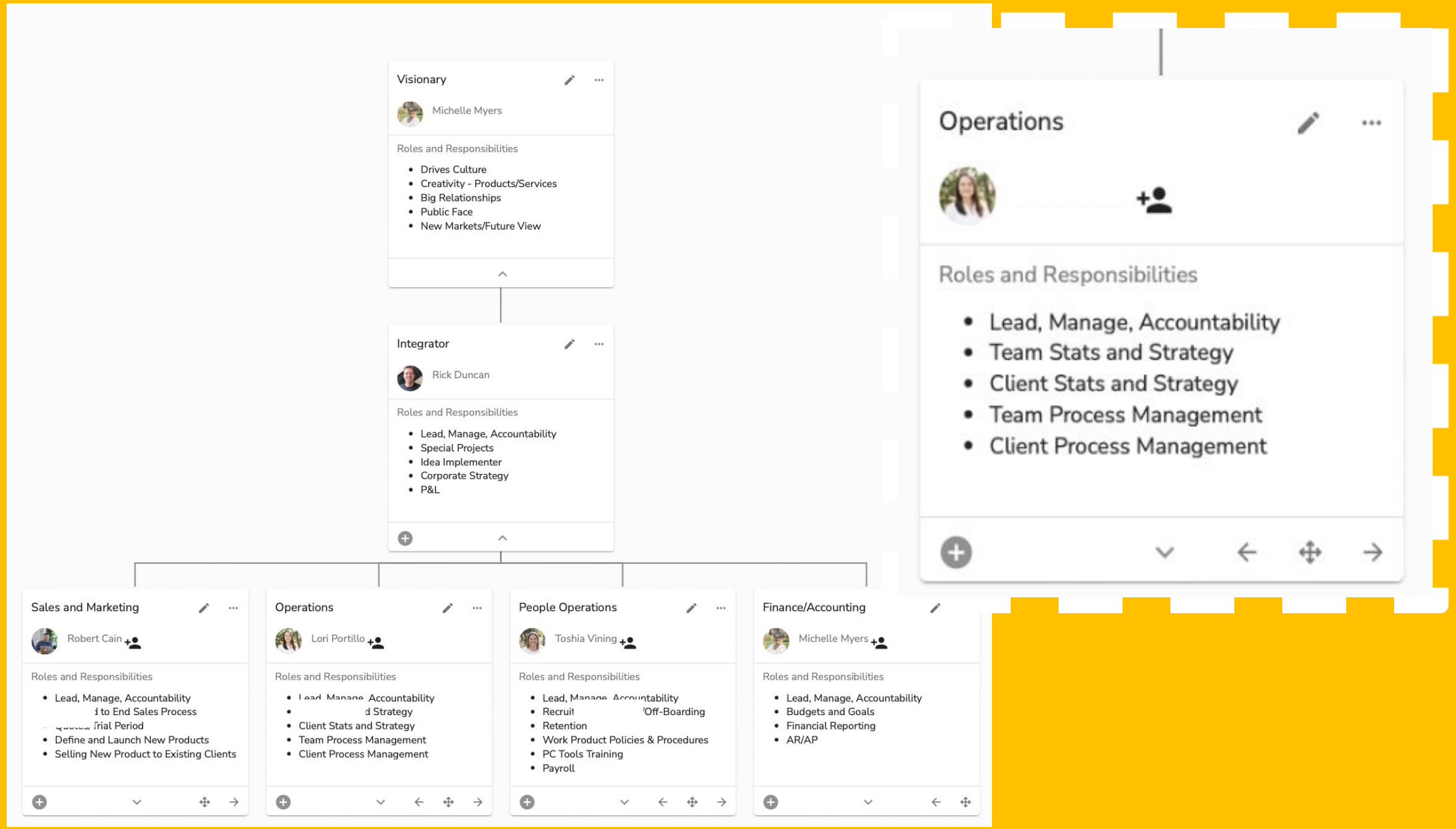
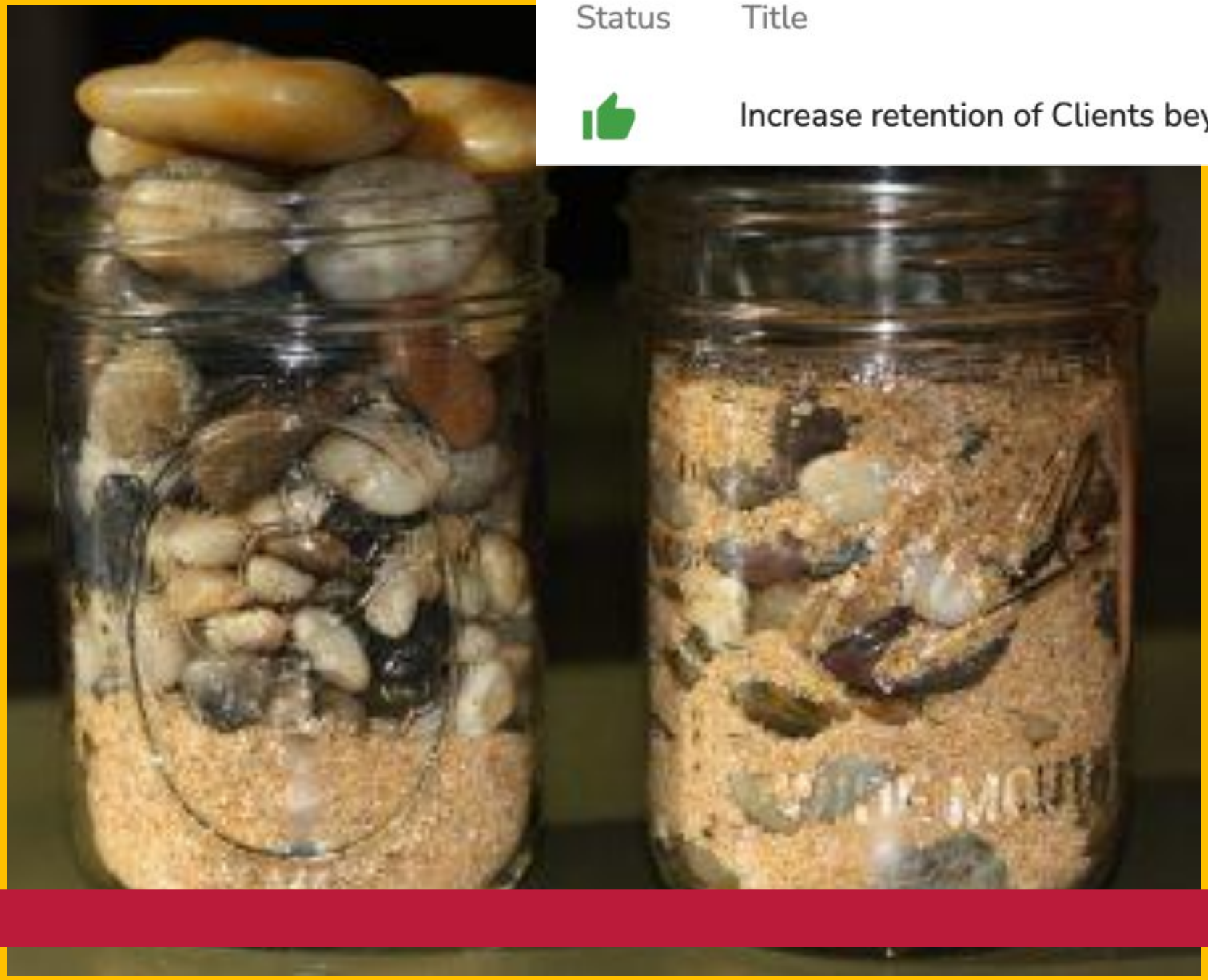
Provide Feedback
Collapse
Vision/Traction Organizer™
FILTERS
Team: Leadership Team
Share V/TO™ with All Teams
Archive
Go to Market Strategy
Target Market
Home service businesses in the HVAC, Plumbing, Tree Service, Electrical, and GC in North America with a minimum of $750K in annual gross revenue, and 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:

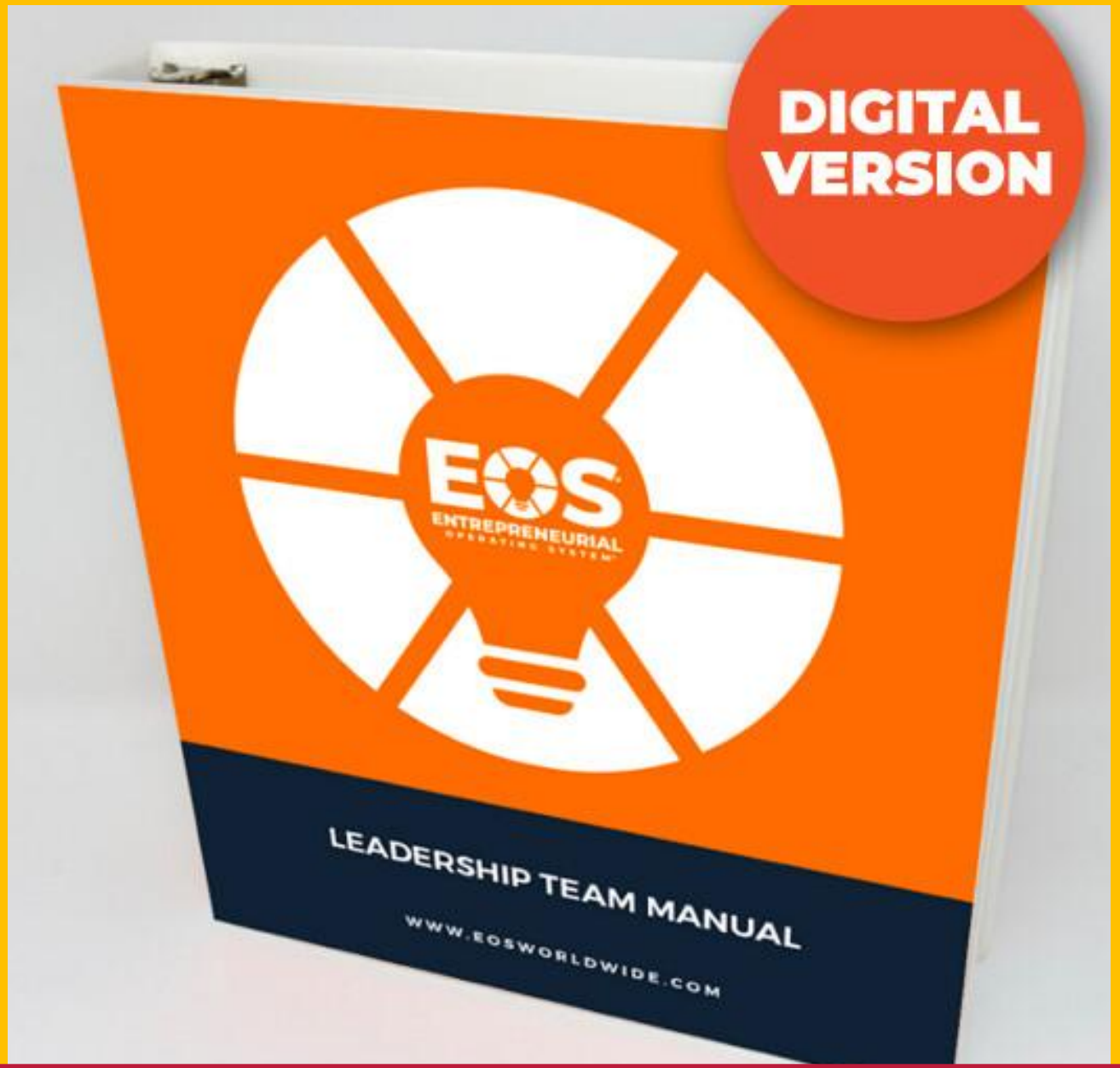
3. ACCOUNTABILITY CHART


Visionary
Michelle Myers
Roles and Responsibilities
Drives Culture
Creativity - Products/Services
Big Relationships
Public Face
New Markets/Future View
Integrator
Rick Duncan
Roles and Responsibilities
Lead, Manage, Accountability
Special Projects
Idea Implementer
Corporate Strategy
P&L
Sales and Marketing
Robert Cain
Roles and Responsibilities
Lead, Manage, Accountability
Define and Launch New Products
Selling New Product to Existing Clients
Operations
Lori Portillo
Roles and Responsibilities
Client Stats and Strategy
Team Process Management
Client Process Management
People Operations
Toshia Vining
Roles and Responsibilities
Retention
Work Product Policies & Procedures
PC Tools Training
Payroll
Finance/Accounting
Michelle Myers
Roles and Responsibilities
Lead, Manage, Accountability
Budgets and Goals
Financial Reporting
AR/AP
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
EOS
ENTREPRENEURIAL
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

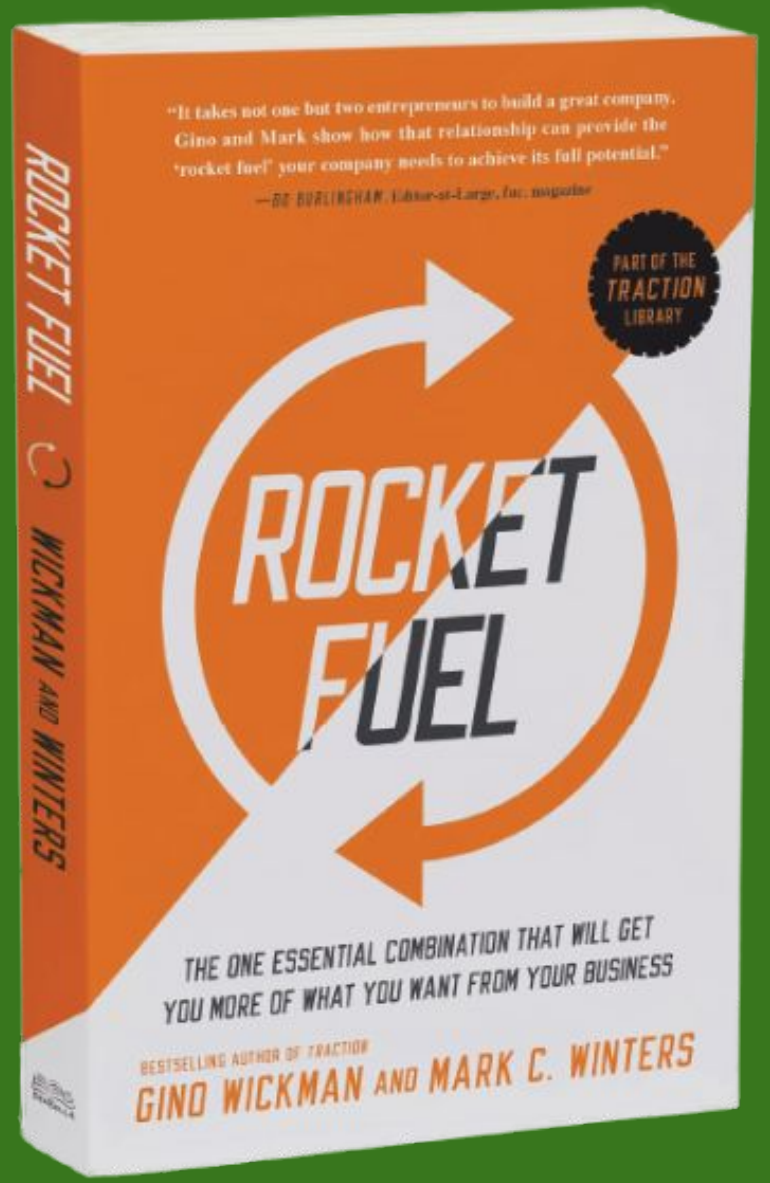
Title	#	Owner
1. End of Day Forms		
2. Pay for Performance for Leadership Team		
3. Ram wants in-house training instead of remote service		
4. Delegation Workflows/Documentation	1	
5. Dispatch Model Clarity		
6. CSR PTO standards in year one	2	
7. Mac Usage - Leadership Team		

2. SCORECARD KPI'S

	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

Pink CALLERS

pinkcallers.com/FENCETECH

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

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Thank you.

Please complete the session survey.

Pink Callers runs on the Entrepreneur Operating System®

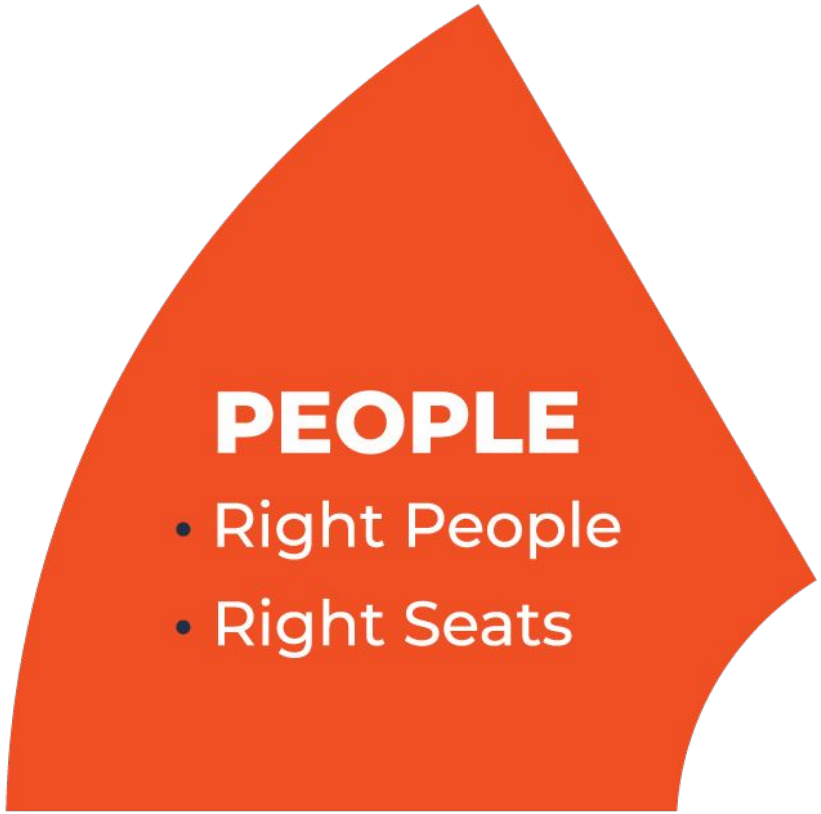
Why EOS is Important for Small Service-Based Businesses

- Define your vision
- Align your teams
- Create a healthy and functional culture.

The EOS Model

EOS Component - Vision

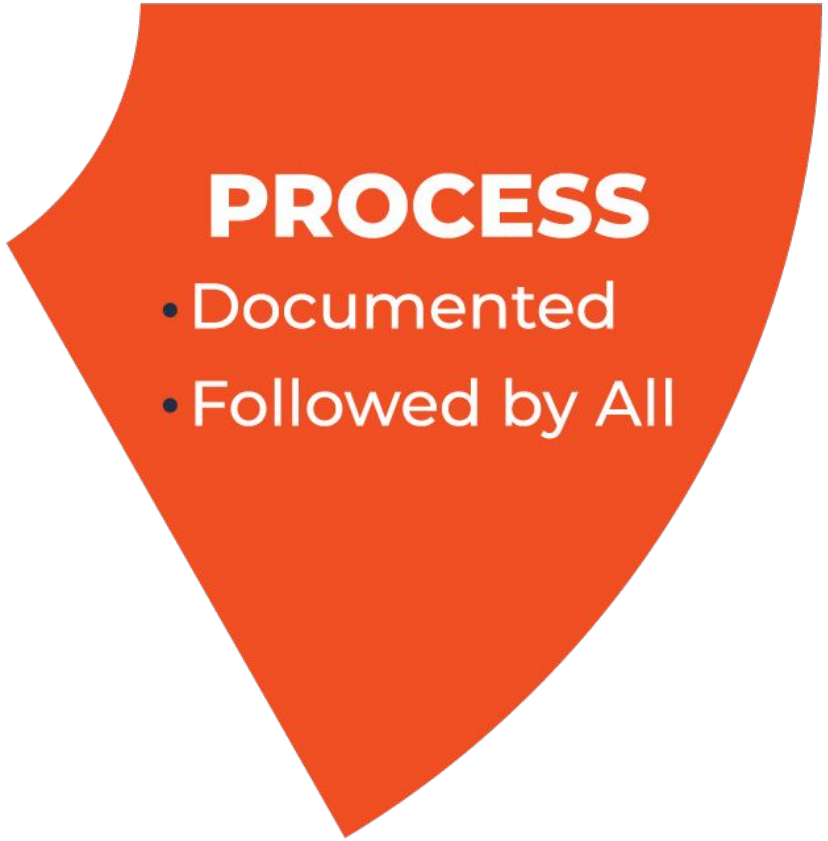
EOS Component - People



EOS Component - Data

EOS Component - Issues

EOS Component - Process



EOS Component - Traction

Conclusion

- EOS is a game changer

www.pinkcallers.com/fencetech