

Take Control of your Business with Insights on the EOS Framework

Scott Morin, Certified EOS Implementer

May 10, 2023 12:30 p.m. ET



FCMC Call for Nominations



CMC
ONTARIO

NOMINATE AN FCMC TODAY

ARE YOU OR
SOMEONE YOU
KNOW PASSIONATE
ABOUT
MANAGEMENT
CONSULTING?

[Learn More](#)

- Recognizing Outstanding CMCs...2023 Call for Nominations for FCMCs CMC–Ontario!
- [FCMC Nominations](#) **Deadline is June 23, 2023**
- Is there someone you respect for their contribution, professionalism, and integrity?
- Visit the CMC Ontario Website for more Information

<https://www.cmc-ontario.ca>



CMC Canada

Certification Courses

CMC Canada Certification courses

<https://cmc-canada.ca/certification-courses>

CMC Certification Weekend – June 15 to 17, 2023

<https://www.cmc-canada.ca/certification-weekend>

Essentials of Management Consulting – May 17 to June 21, 2023

<https://cmc-canada.ca/emc>





CMC Pro Bono Program

SEEKING VOLUNTEER CMCs!

Currently recruiting additional volunteers for an Ontario-wide launch this fall.

Most requested skill sets:

- *Governance*
- *Human resources*
- *Program evaluation*

For more info, contact
probono@cmc-ontario.ca



WHAT'S UP NEXT

- ❑ [June 14, 2023](#): How to Effectively Partner with Indigenous Firms with Dale Booth and guest host Jennifer Smith
- ❑ [June 16, 2023](#): How to Set-up Change for Success Strategic Change by Design with Louise Harris
 - ❑ Instructor led
 - ❑ Certificate course
 - ❑ Earn 10 CPD points
 - ❑ Members receive a 30% discount



How to Setup Change for Success

June 16 to 30, 2023



How to Participate

- Participant controls in the lower left corner of the Zoom screen
- You will be muted for this call
- To ask a question – Type the question into the chat tool.
- We kindly ask that you turn your Video on if you are able to. We want to see your smiling faces!
- This session will be recorded
- A copy of the presentation will be available after the event.



ABOUT OUR PRESENTER

Scott Morin

- ❑ Over Twenty-five years as a Sales leader
- ❑ Founder of Bytown Ventures
- ❑ Certified EOS Implementer

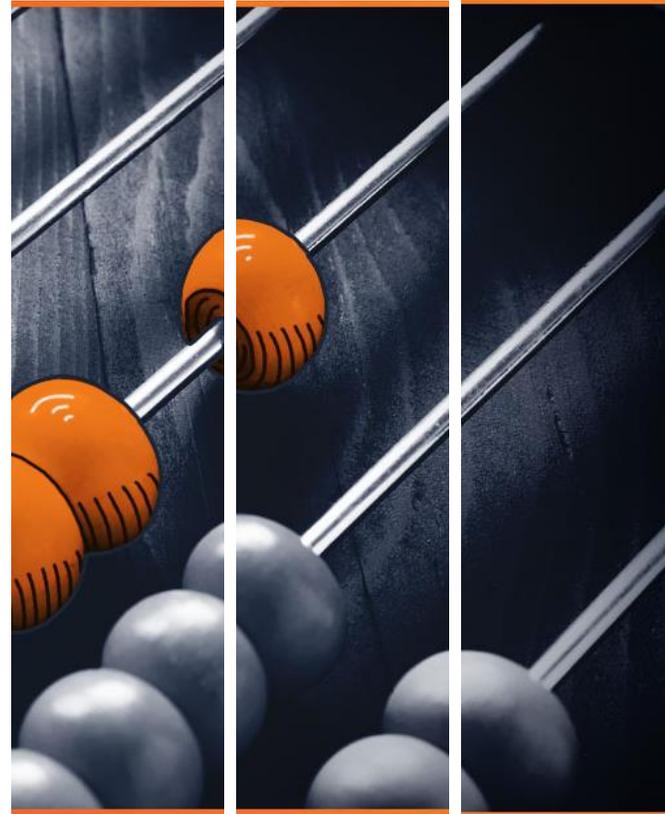
Scott Morin, Principal,
Bytown Ventures www.bytownventures.com



What's **UP?**
Wednesday

CMC

Entrepreneurial Operating System

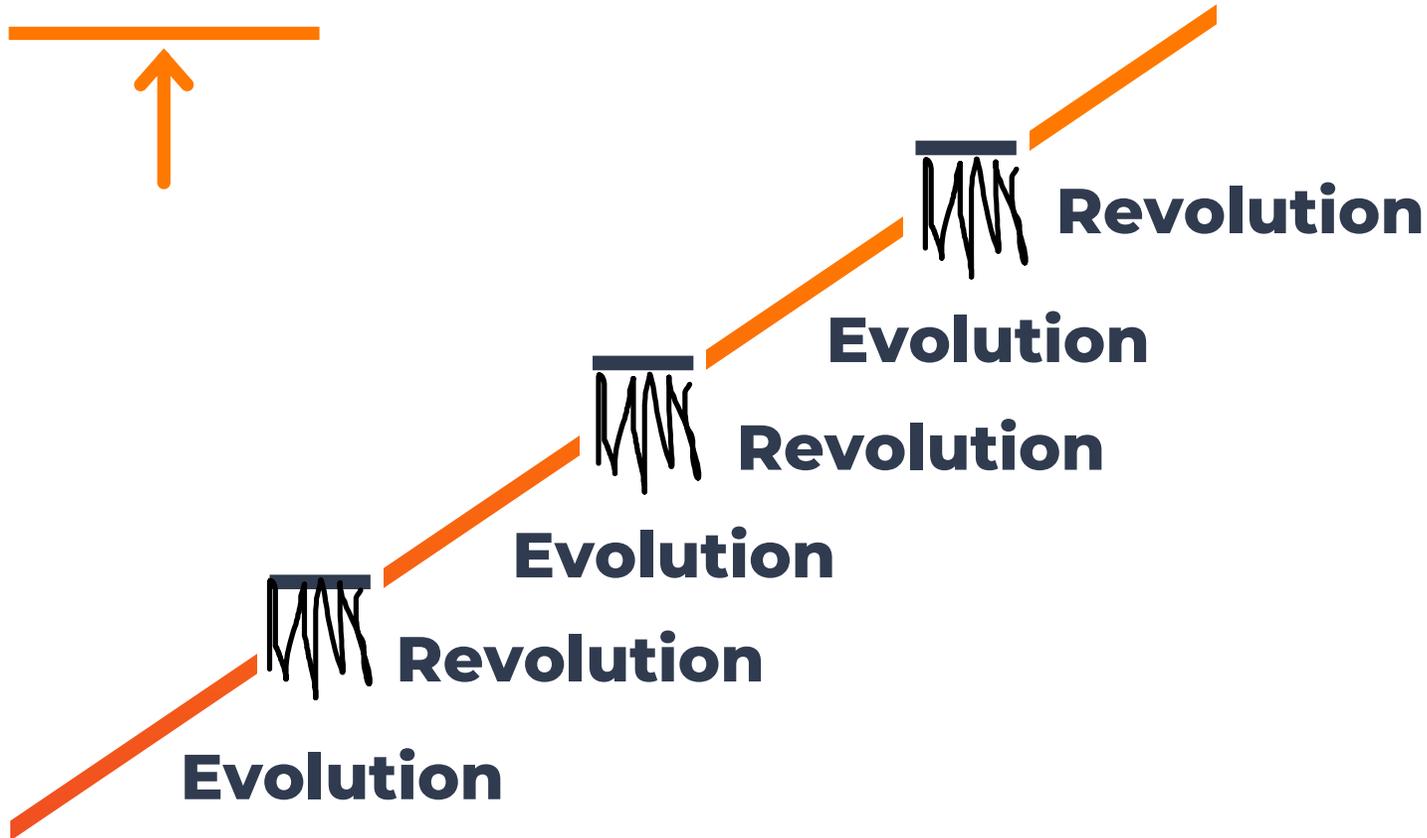


A HIGHER LEVEL of
management consulting
ONTARIO



Un NIVEAU SUPÉRIEUR
de conseil en management
ONTARIO

HITTING THE CEILING



3 levels:

- The Organizational level
- The Department level
- The Individual level

**Hitting the ceiling
is inevitable!**

¹Bloomberg

3 Questions

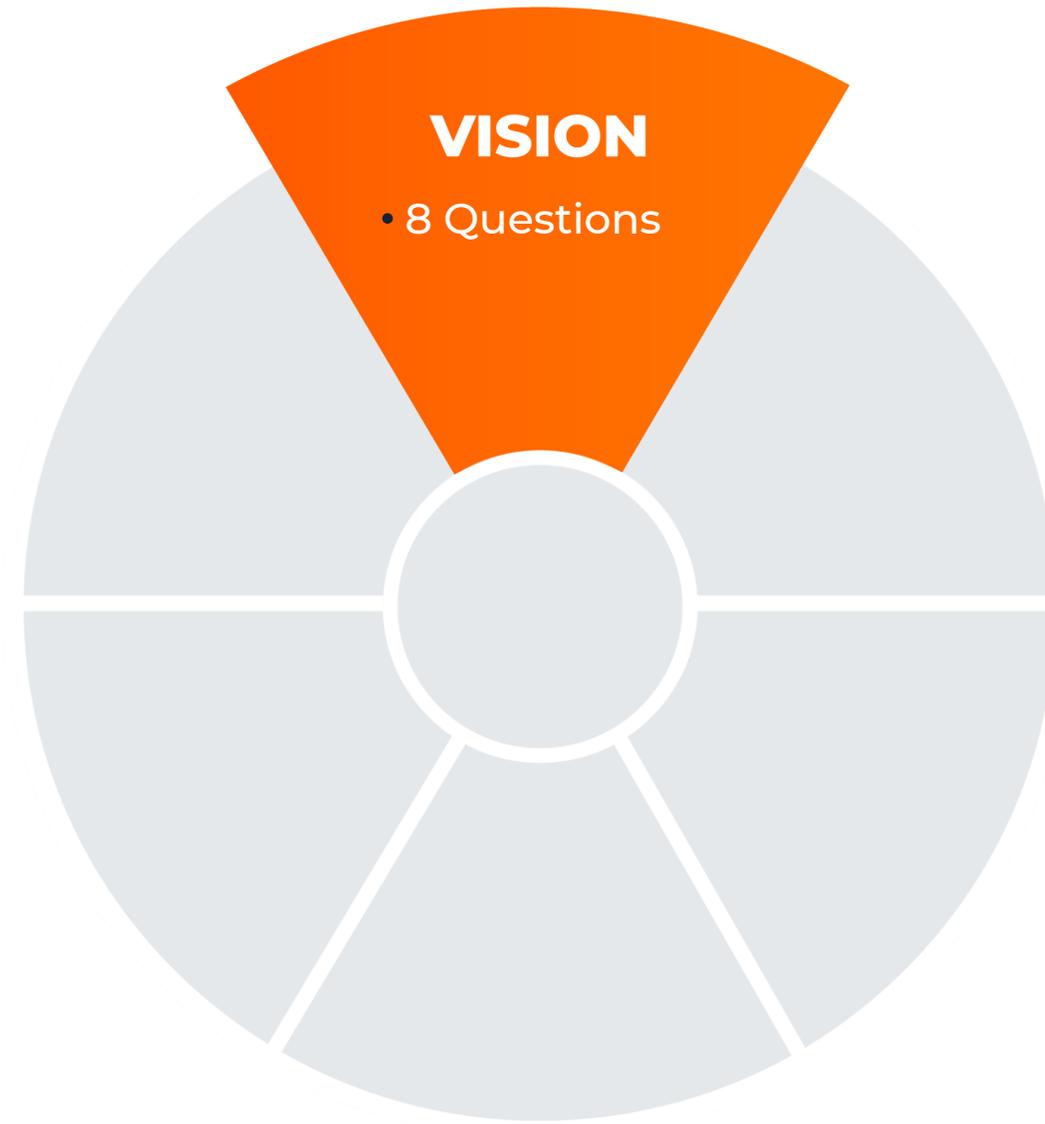
THE EOS MODEL®



THE EOS MODEL



THE EOS MODEL



	1. 2.	3-YEAR PICTURE™
CORE VALUES	1. 2. 3. 4. 5.	
10-YEAR TARGET™	_____ _____ _____	• • • • • • • • • •
MARKETING STRATEGY	Target Market/"The List": Three Uniques™: 1. 2. 3. Proven Process: Guarantee:	

	1.	3-YEAR PICTURE™
CORE FOCUS™	Purpose/Cause/Passion: Our Niche:	
10-YEAR TARGET™	<hr/> <hr/>	• • • • • •
MARKETING STRATEGY	Target Market/"The List": Three Uniques™: 1. 2. 3. Proven Process: Guarantee:	

CORE VALUES	1. 2. 3. 4.	3-YEAR PICTURE™
10-YEAR TARGET™	<hr/> <hr/>	
CORE FOCUS™	Our Niche:	What Does it Look Like? • • • • • • • • • •
10-YEAR TARGET™	<hr/> <hr/>	
MARKETING STRATEGY	Target Market/"The List": Three Uniques™: 1. 2. 3. Proven Process: Guarantee:	

CODE	1. 2.	3-YEAR PICTURE™
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CORE VALUES	<ol style="list-style-type: none"> 1. 2. 3. 4. 5.
CORE FOCUS™	<p>Purpose/Cause/Passion:</p> <p>Our Niche:</p>
10-YEAR TARGET™	<hr/> <hr/>
MARKETING STRATEGY	<p>Target Market/"The List":</p> <p>Three Uniques™: <ol style="list-style-type: none"> 1. 2. 3. </p> <p>Proven Process:</p> <p>Guarantee:</p>

3-YEAR PICTURE™

Future Date:

Revenue:

Profit:

Measurables:

What Does It Look Like?

-
-
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1-YEAR PLAN	ROCKS	ISSUES LIST																
<p>Future date:</p> <p>Revenue:</p> <p>Profit:</p> <p>Measurables:</p> <p>Goals for the Year</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p> <p>6. _____</p> <p>7. _____</p>	<p>Future date:</p> <p>Revenue:</p> <p>Profit:</p> <p>Measurables:</p> <table border="1"> <thead> <tr> <th data-bbox="1009 625 1460 658">Rocks for the Quarter</th> <th data-bbox="1460 625 1556 658">Who</th> </tr> </thead> <tbody> <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> </tbody> </table>	Rocks for the Quarter	Who	1. _____	_____	2. _____	_____	3. _____	_____	4. _____	_____	5. _____	_____	6. _____	_____	7. _____	_____	<p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p> <p>6. _____</p> <p>7. _____</p> <p>8. _____</p> <p>9. _____</p> <p>10. _____</p> <p>Prioritize</p> <ul style="list-style-type: none"> • Identify • Discuss • Solve
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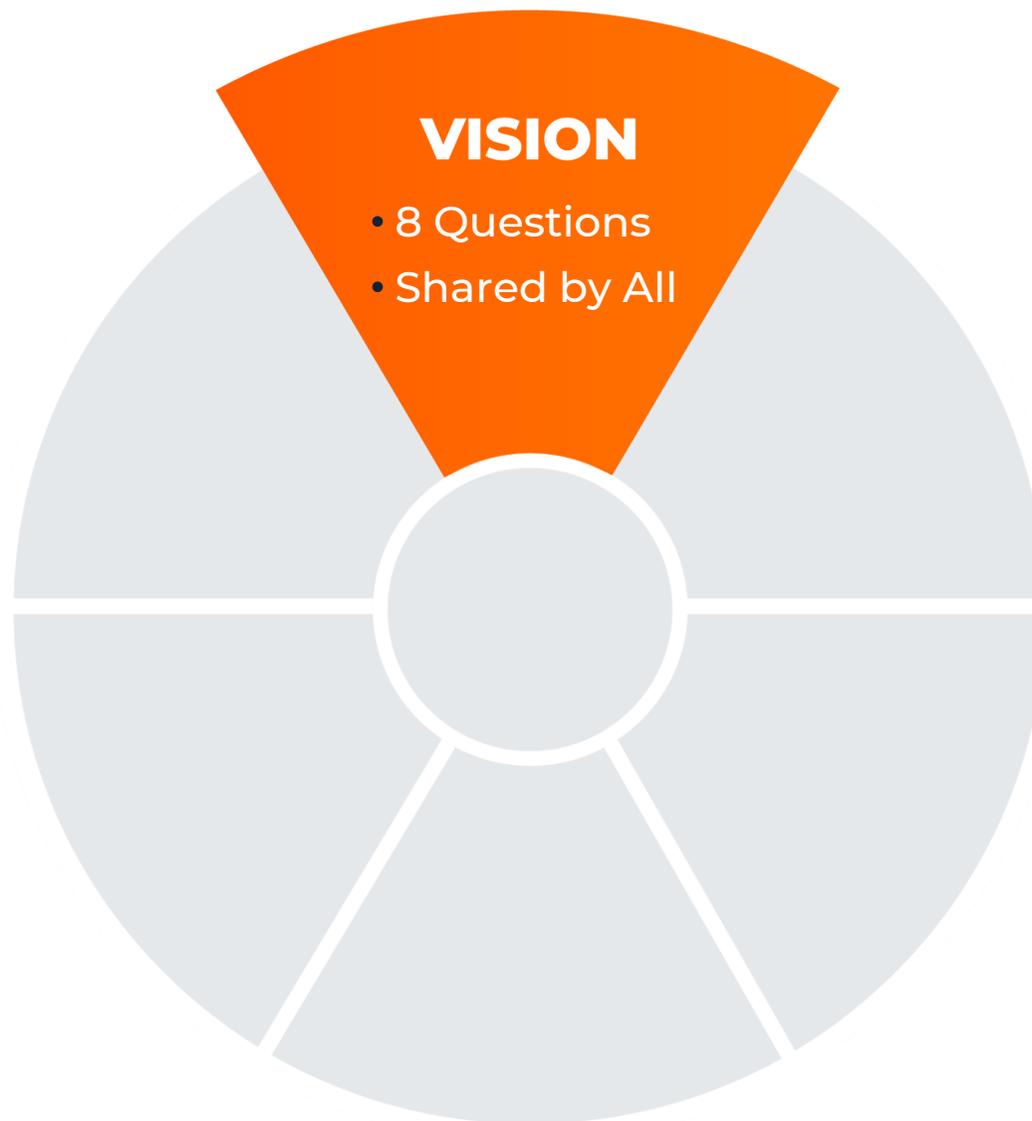
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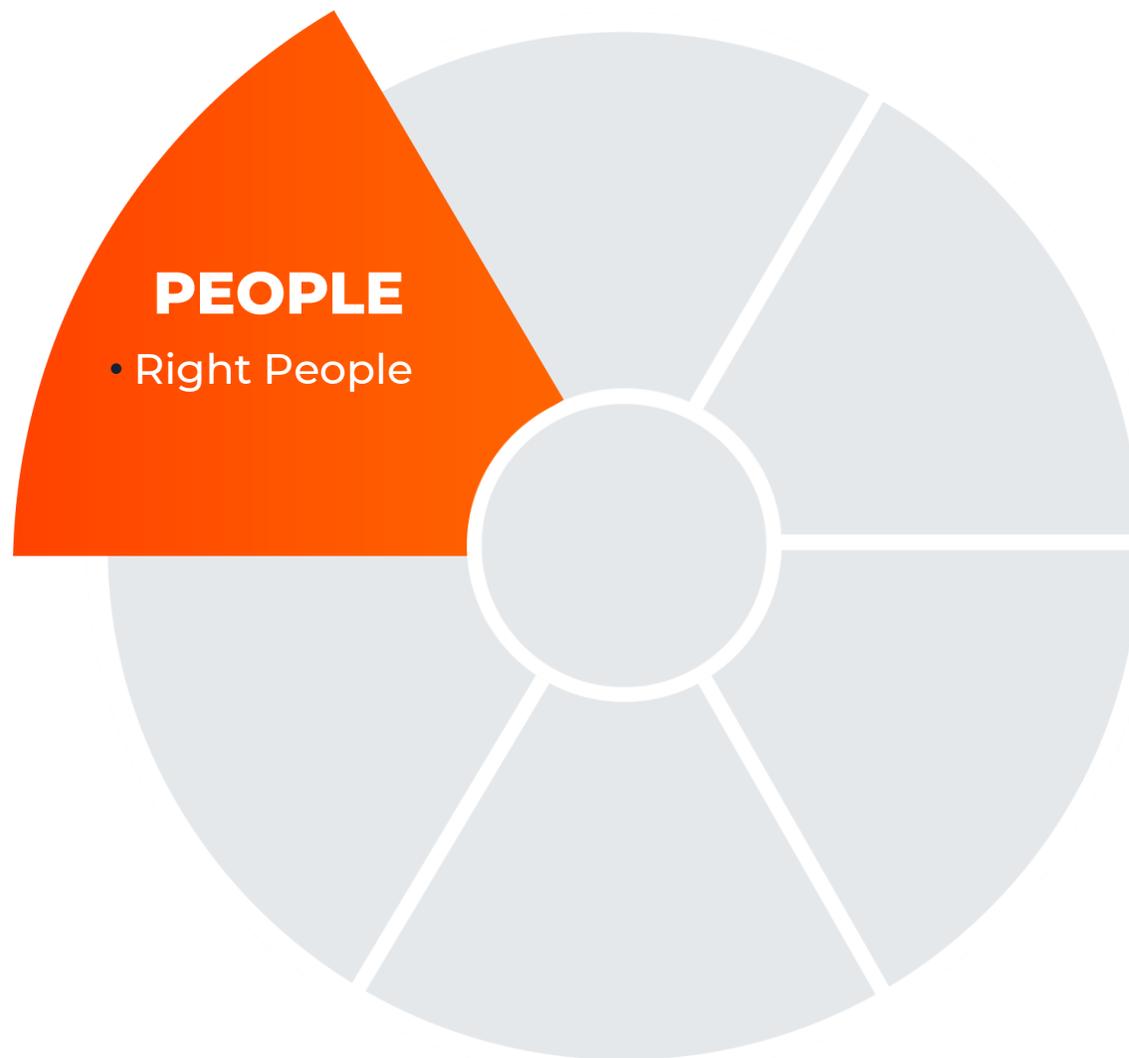
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THE EOS MODEL

100% Strong



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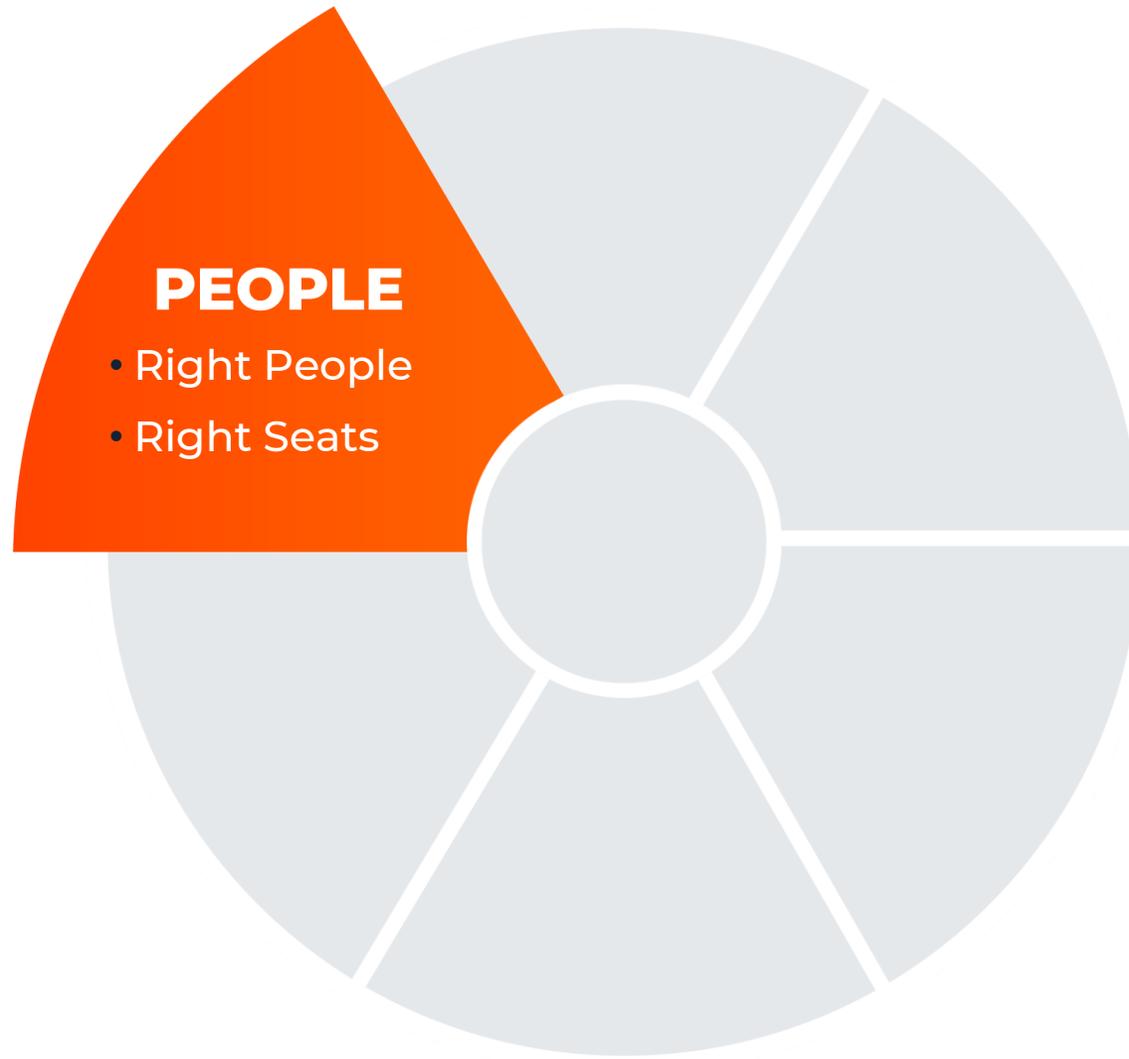
THE PEOPLE ANALYZER™

NAME	<i>Humbly confident</i>	<i>Grow or Die</i>	<i>Help First</i>	<i>Do the right thing</i>	<i>Do what you say</i>					
Maria Rodriguez	+	+	+	+	+					
John Smith	-	+/-	-	-	+/-					
George Wilson	+/-	+/-	+	+/-	+					

THE BAR

RATING: + +/- -	+	+/-	+	+/-	+					
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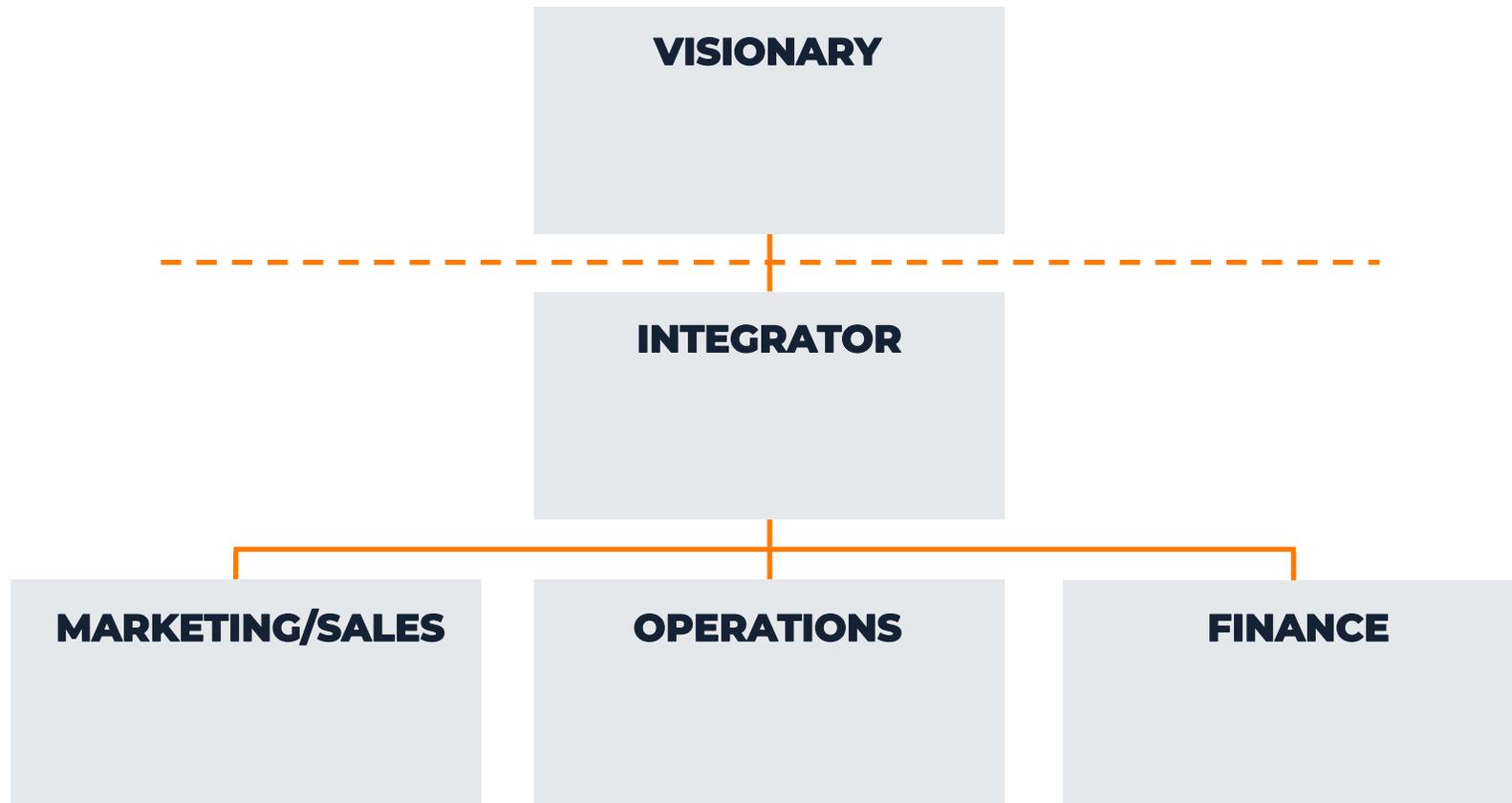
THE EOS MODEL



“Structure first,
people second.”

–GINO WICKMAN

ACCOUNTABILITY CHART™



RIGHT SEATS

- Gets It
- Wants It
- Capacity to Do It

Center

Name

- Win face offs
- Create scoring chances
- Score goals
- Back check/defend
- Minimize turnovers

THE PEOPLE ANALYZER™

NAME	<i>Humbly confident</i>	<i>Grow or Die</i>	<i>Help First</i>	<i>Do the right thing</i>	<i>Do what you say</i>	<i>VALUE</i>	<i>VALUE</i>	GETS IT	WANTS IT	CAPACITY
Maria Rodriguez	+	+	+	+	+			Y	Y	Y
John Smith	-	+/-	-	-	+/-			Y	Y	N
George Wilson	+/-	+/-	+	+/-	+			N	Y	Y

THE BAR

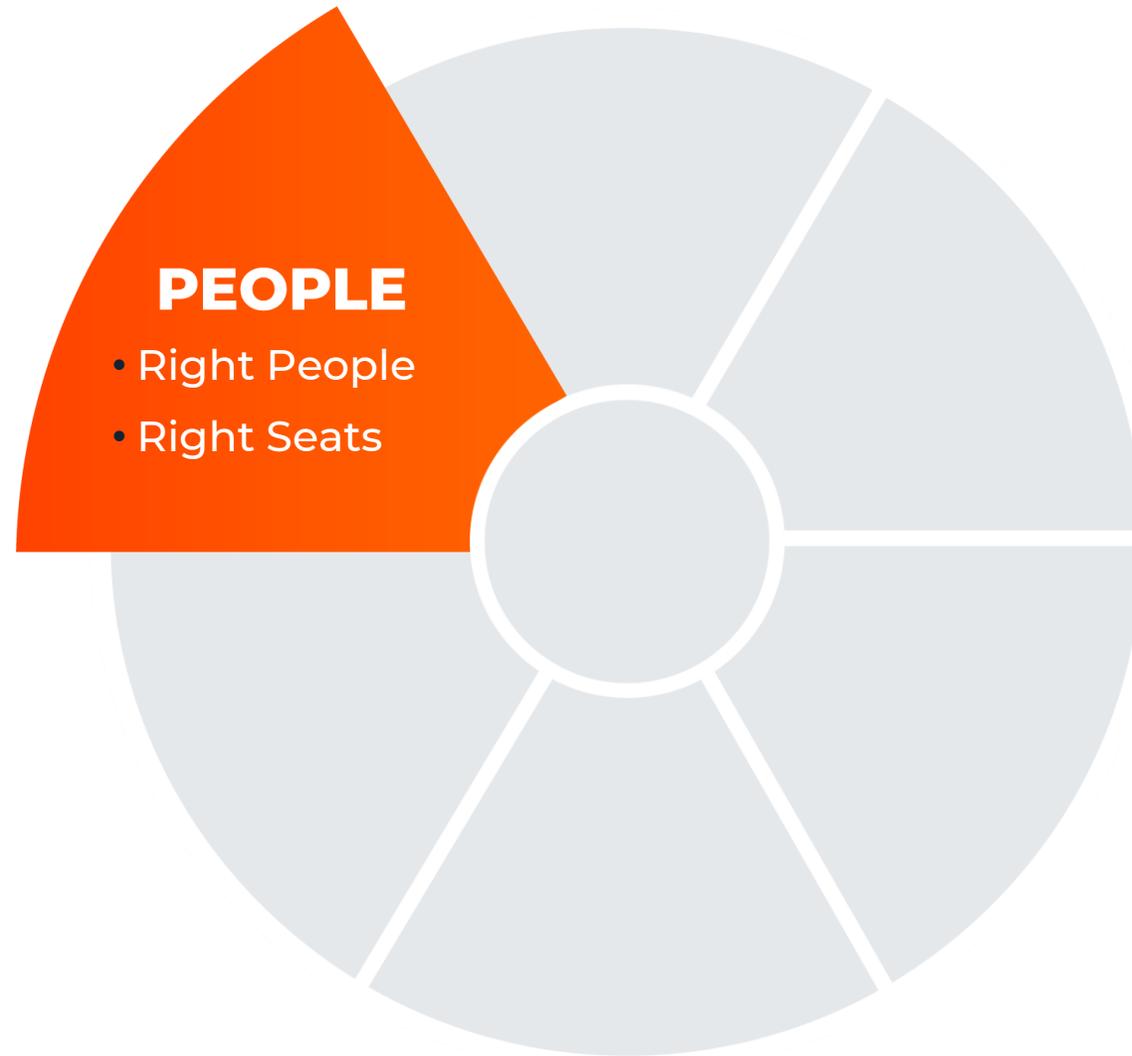
RATING: + +/- -	+	+/-	+	+/-	+					
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TWO KINDS OF PEOPLE ISSUES

- 💡 Right Person, Wrong Seat
- 💡 Wrong Person, Right Seat

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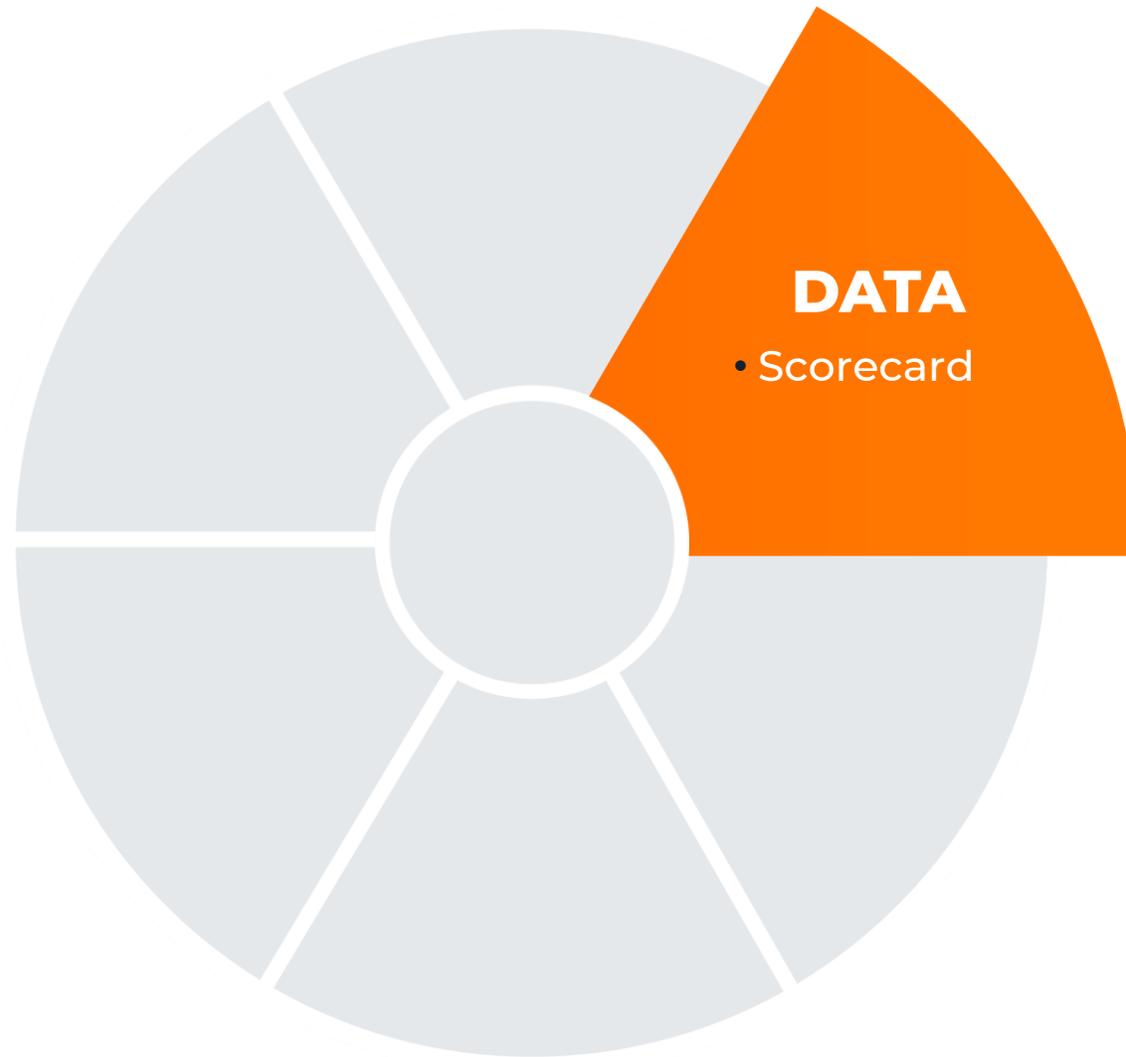
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“If we have data, let’s look at the data. If all we have are opinions, let’s go with mine.”

–**JIM BARKSDALE**, *former Netscape CEO*

THE EOS MODEL



COMPANY SCORECARD

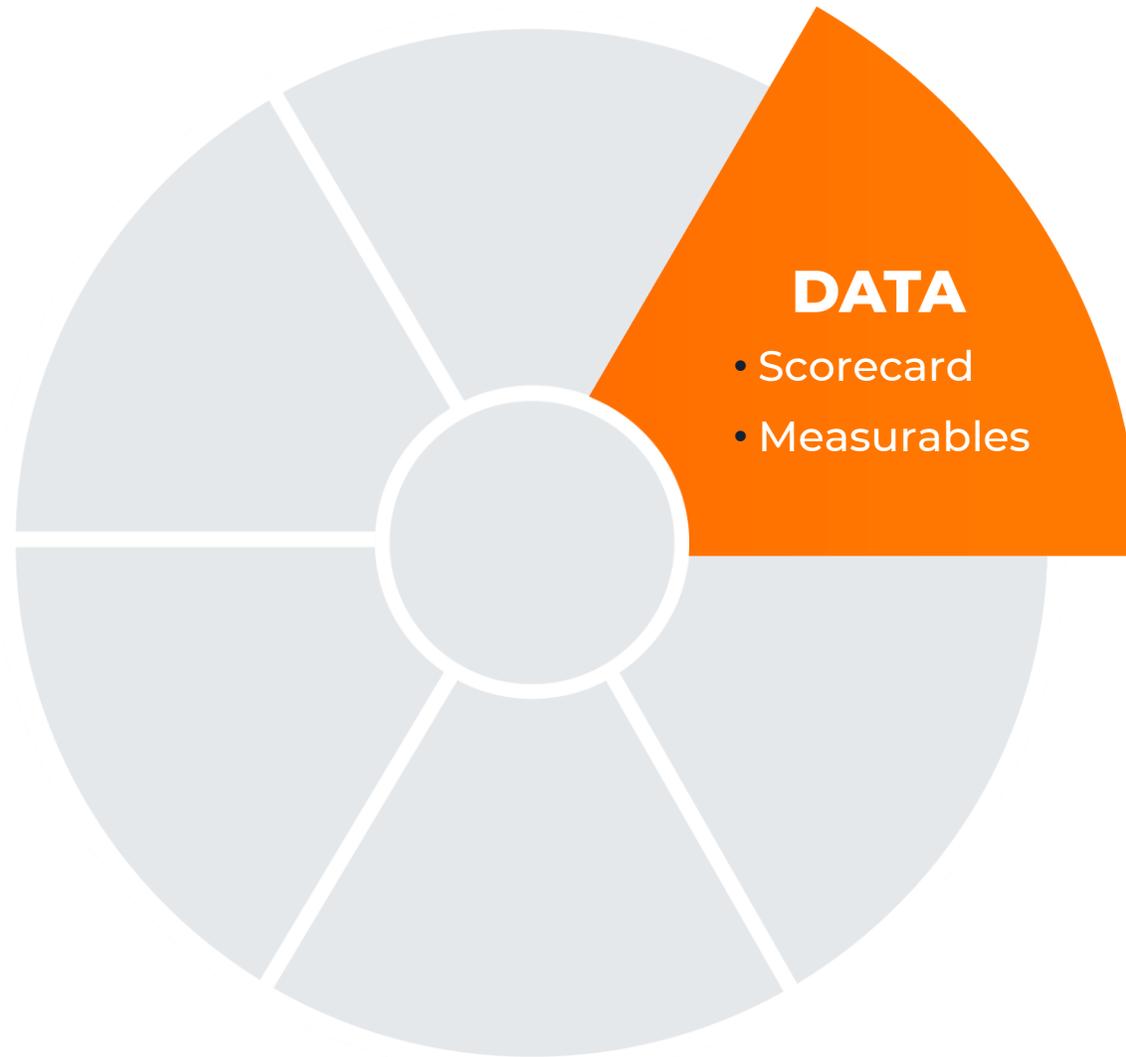
WHO	MEASURABLES	GOAL	30-Sep	7-Oct	14-Oct	21-Oct	28-Oct	4-Nov	11-Nov	18-Nov	25-Nov	2-Dec	9-Dec	16-Dec	23-Dec
Anne	Weekly Revenue	>=\$84,500	\$92,000	\$85,238	\$81,200	\$80,934	\$88,678	\$88,200	\$85,321	\$80,282	\$95,291	\$100,281	\$86,200	\$78,290	\$83,498
Anne	Cash Balance	>=\$14,245	\$16,230	\$15,200	\$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%

SCORECARD MEASURABLES

- Weekly Revenue
- Cash Balance
- Sales Calls
- Sales Meetings
- Proposals
- Closed Business
- Customer Rating
- Accounts Receivable
- Accounts Payable
- Errors
- Utilization Rates
- Web Conversions

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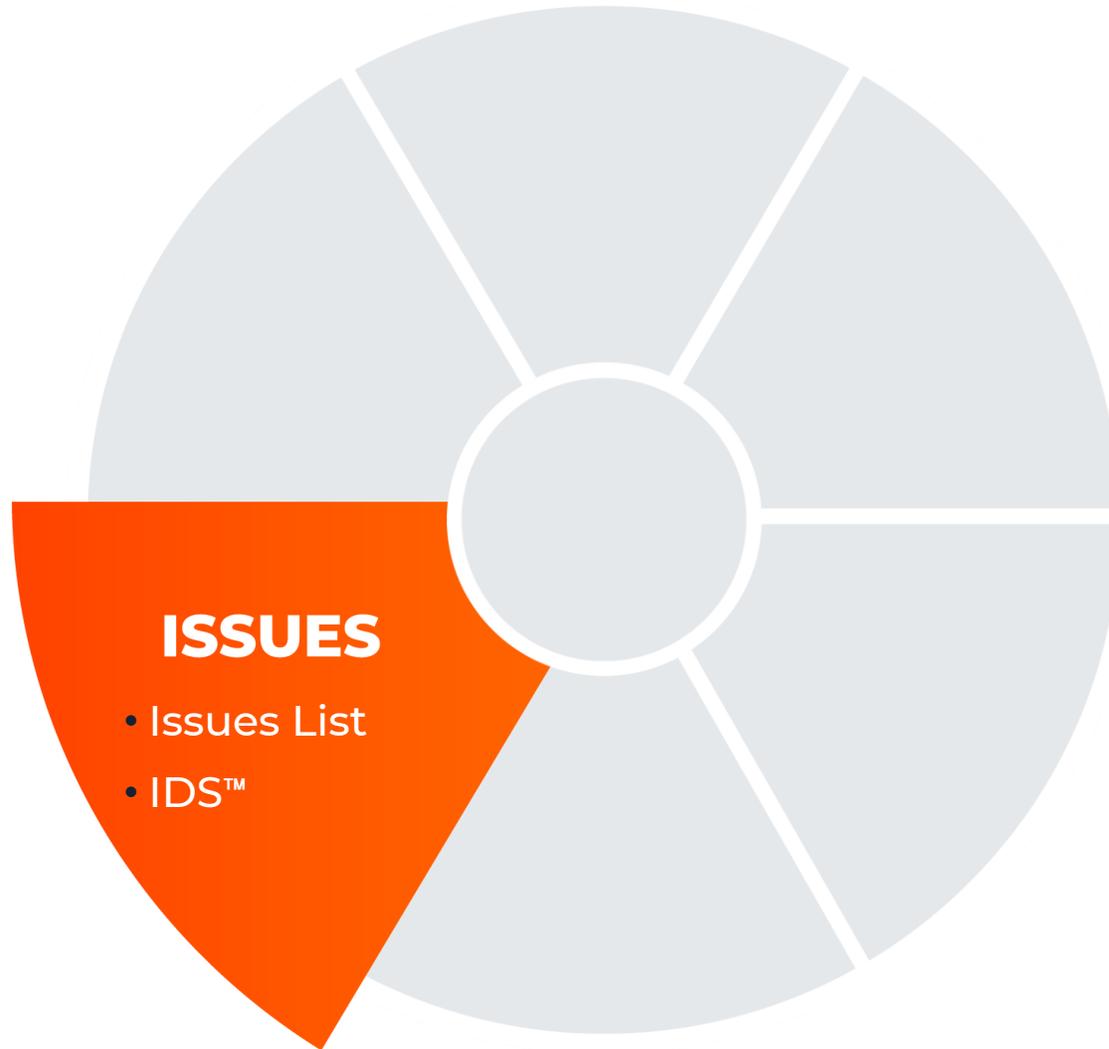
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ISSUES SOLVING TRACK

• Identify

• Discuss

• Solve

ISSUES LIST

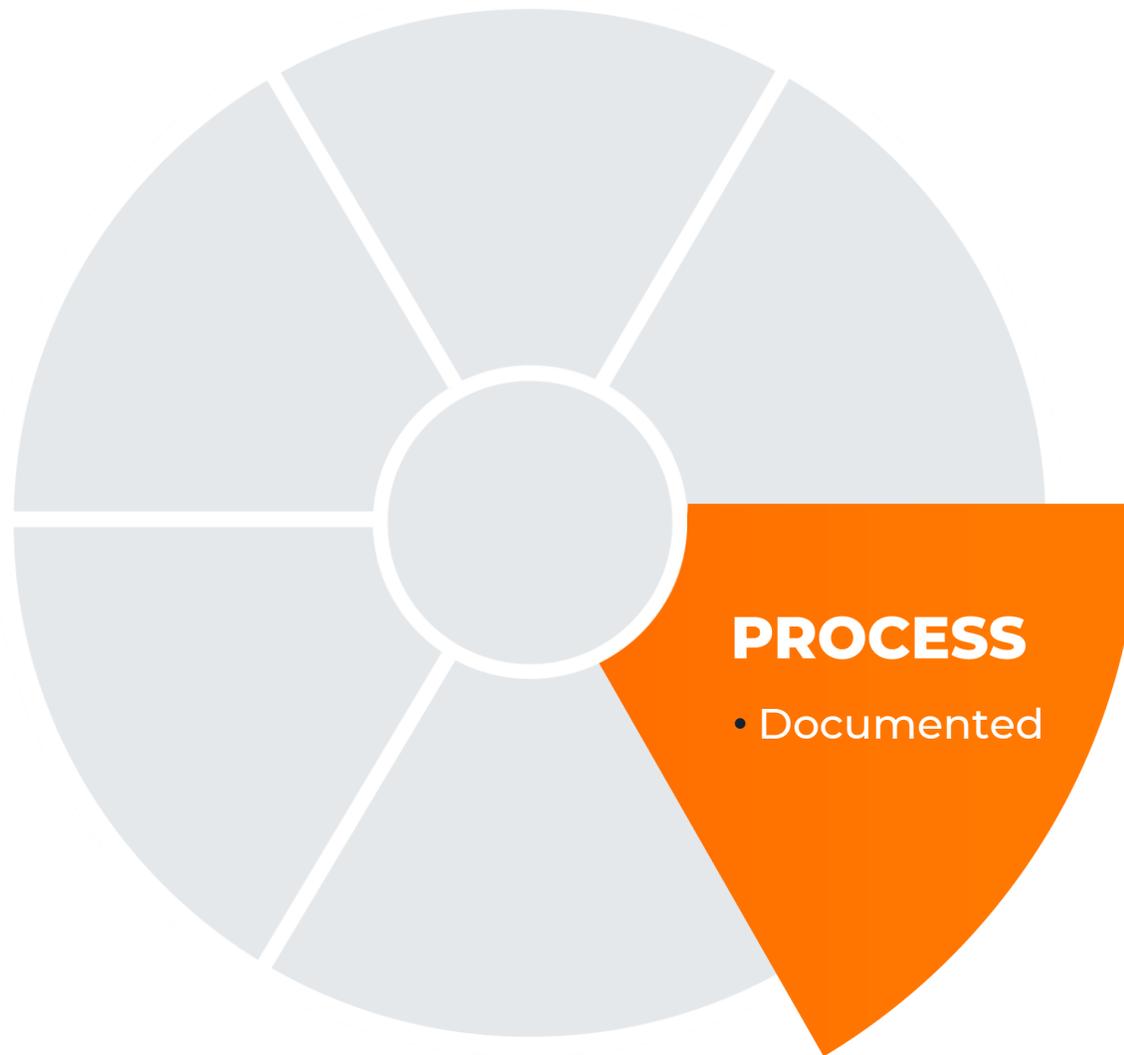
1. Website Rock off-track **2**
2. Darren U. Right Person
3. Andi S. Right Seat **1**
4. Sales off-track
5. Anodyne Merger **3**
6. Utilization off-track
7. Western US expansion
8. _____
9. _____
10. _____

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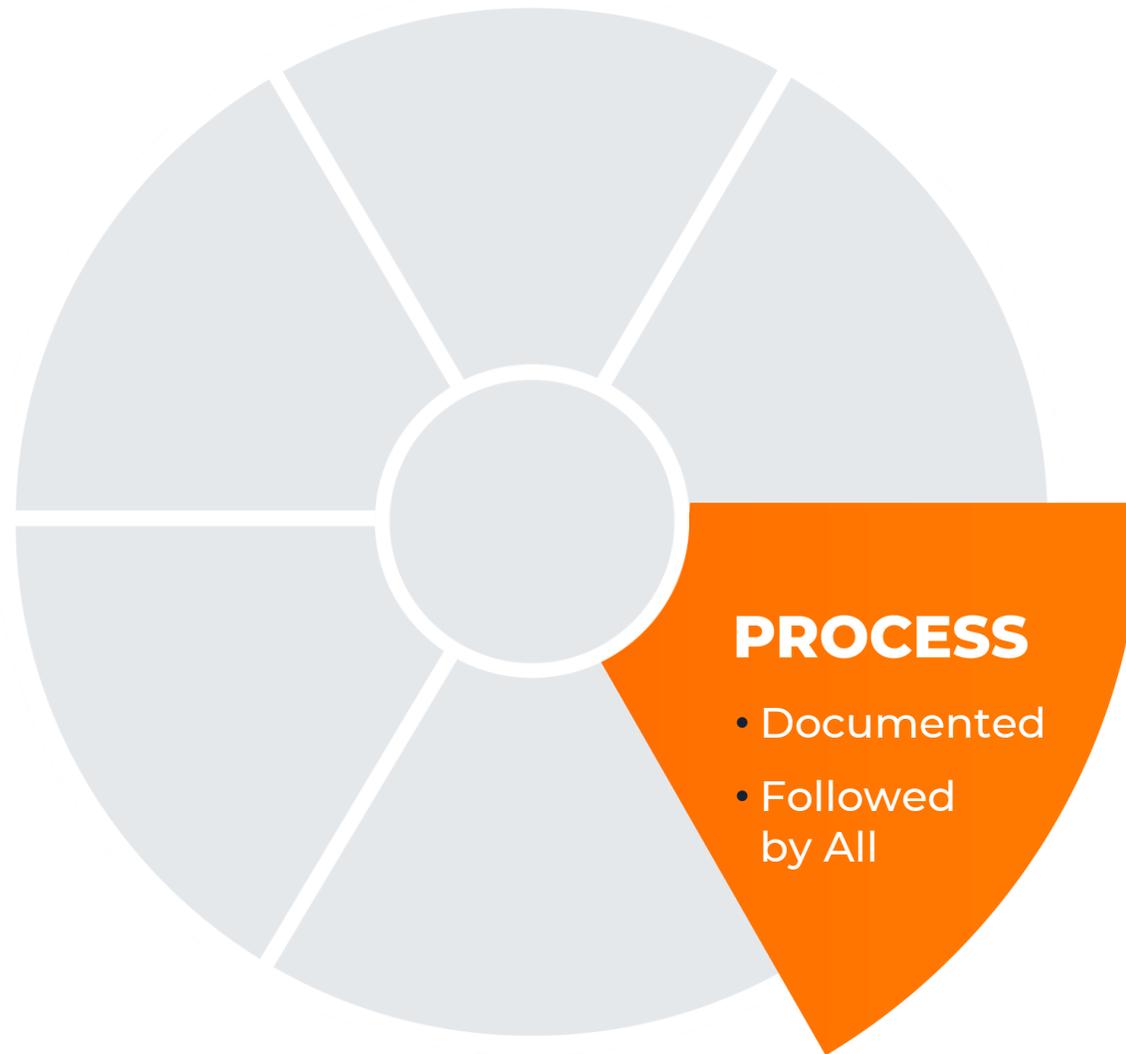


HANDFUL OF CORE PROCESSES

- People
- Marketing
- Sales
- Operations 1
- Operations 2
- Customer Service
- Accounting



THE EOS MODEL





FBA CHECKLIST



Train



Measure



LMA

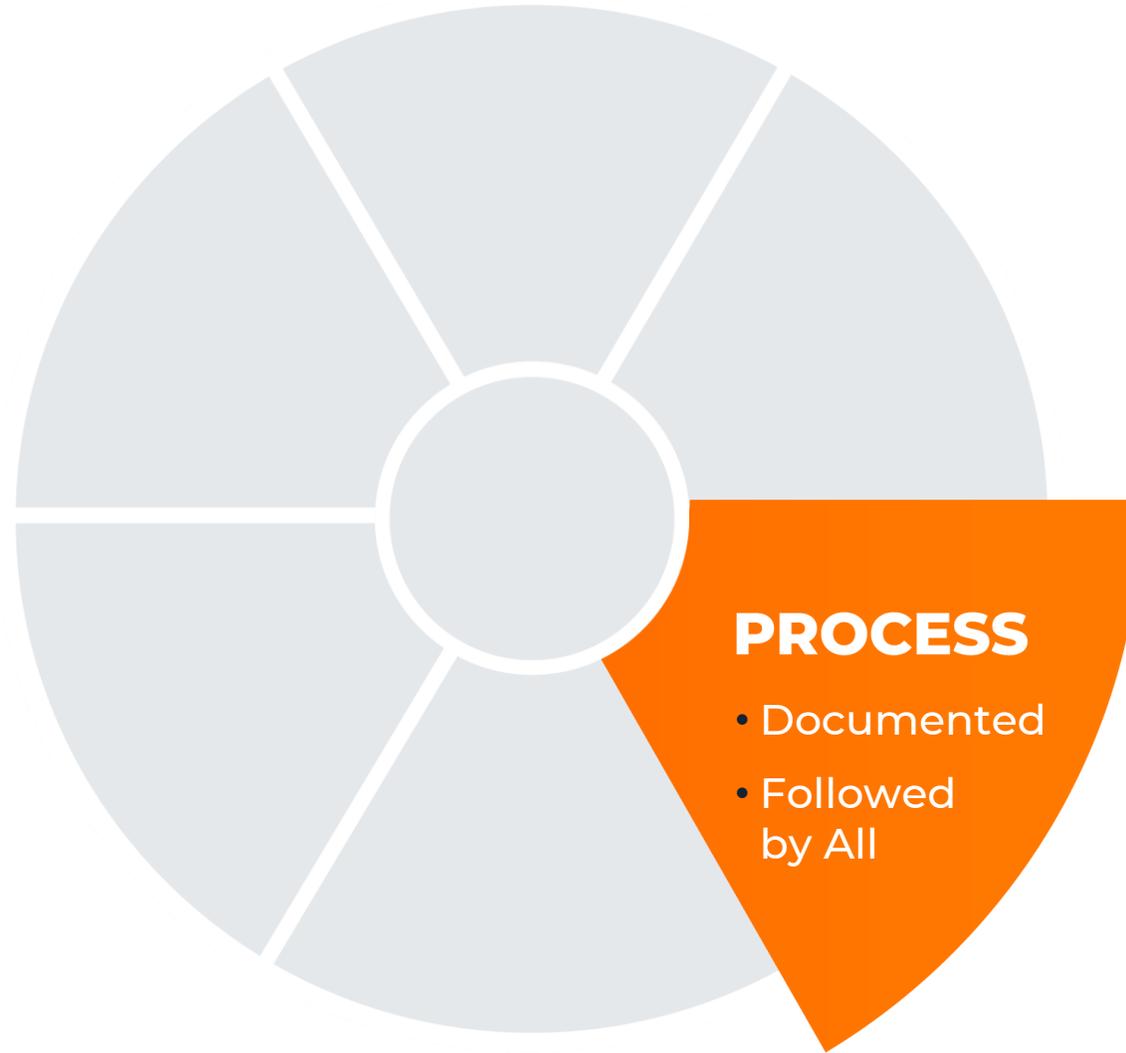


Update

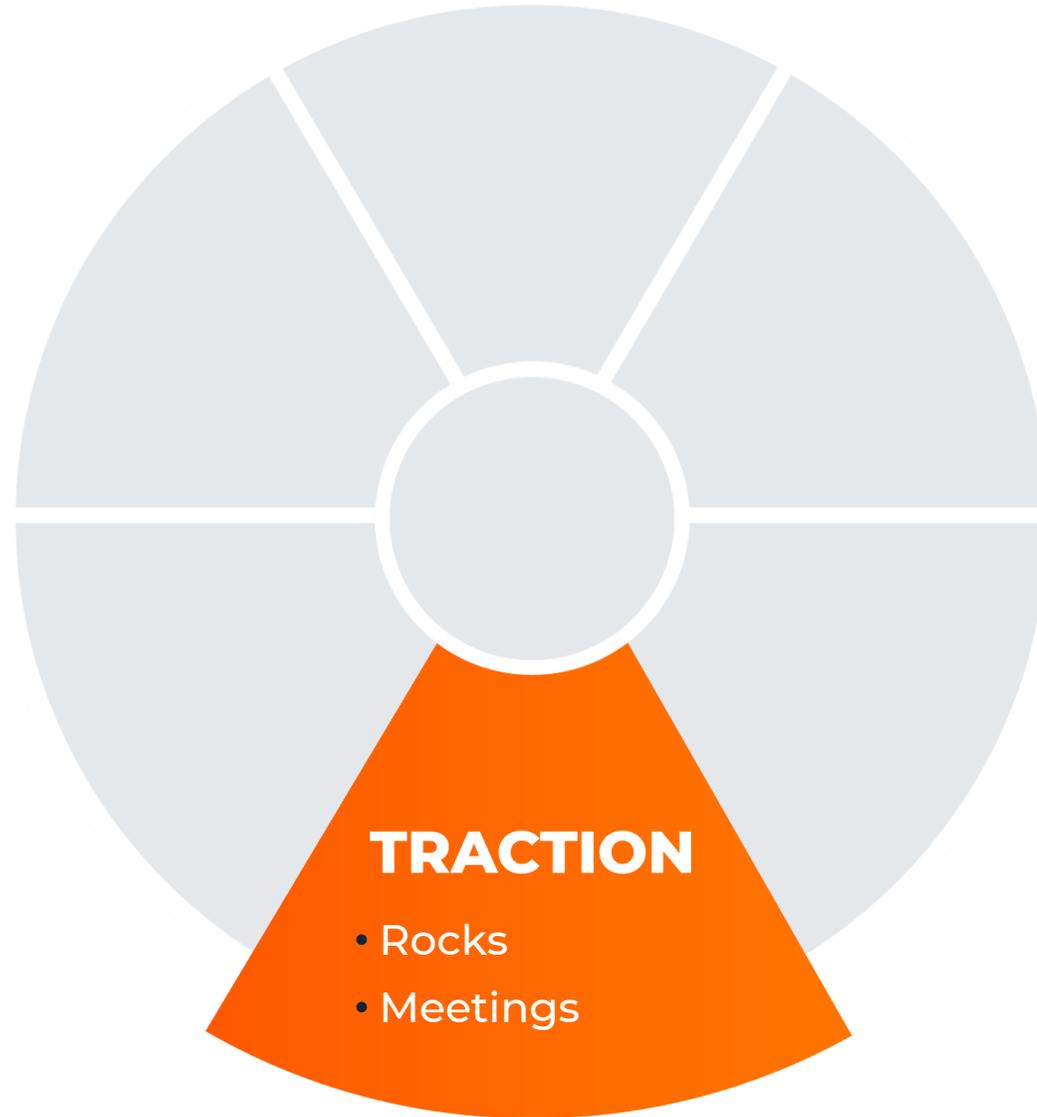


THE EOS MODEL

100% Strong



THE EOS MODEL



The book "[Tracation](#)"



MEETING PULSE™

- **90-Day World™**
- **Meeting Pulse**
 - Same Day
 - Same Time
 - Start on Time
 - End on Time
 - Same Agenda



LEVEL 10 MEETING™

- Good News 5 Minutes
- Scorecard 5 Minutes
- Rock Review **Reporting Only** 5 Minutes
- Customer & Employee Headlines 5 Minutes

- To Do List 5 Minutes

Placeholder text for To Do List

- Issues List/IDS 60 Minutes

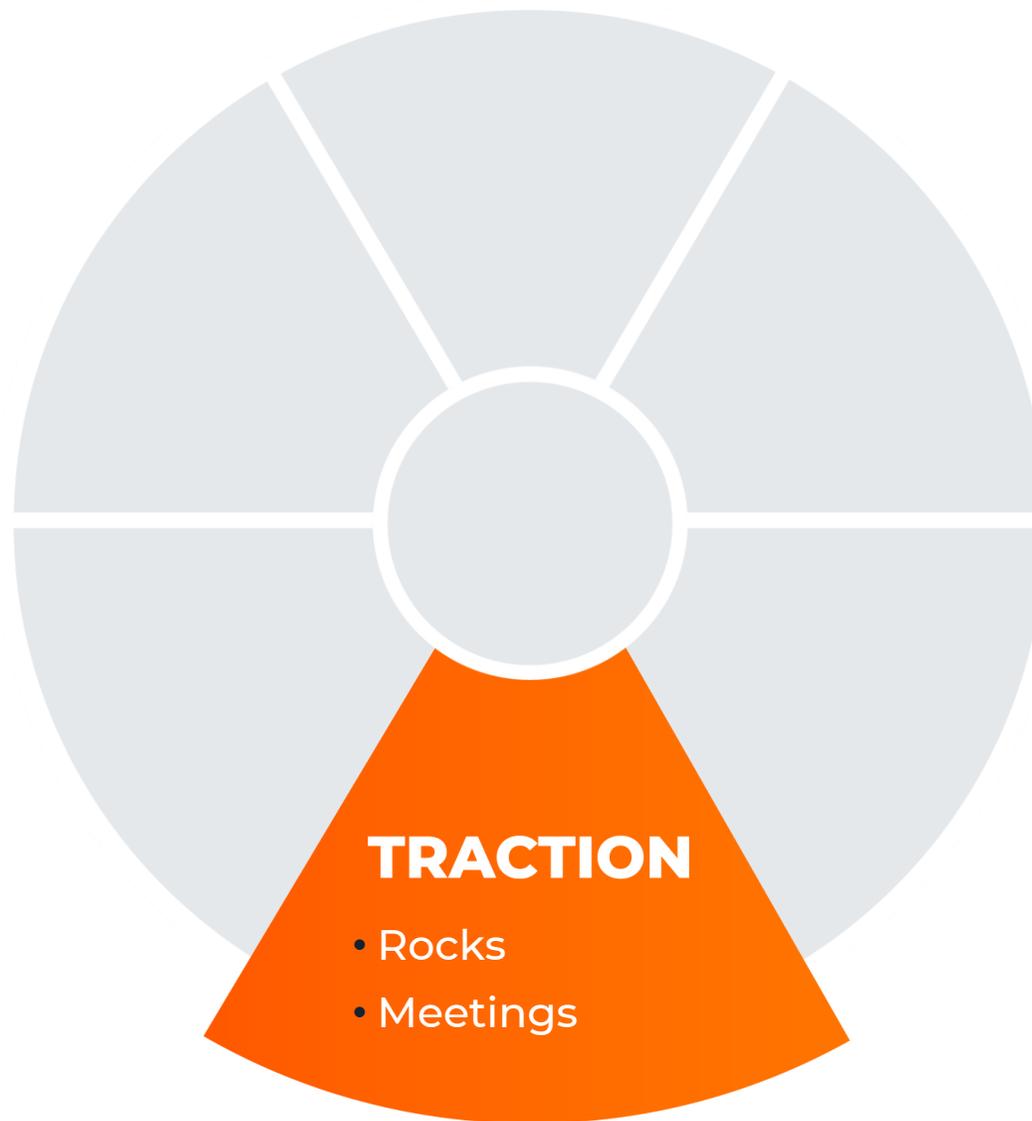
Placeholder text for Issues List/IDS

Placeholder text for Issues List/IDS

- Conclude 5 Minutes

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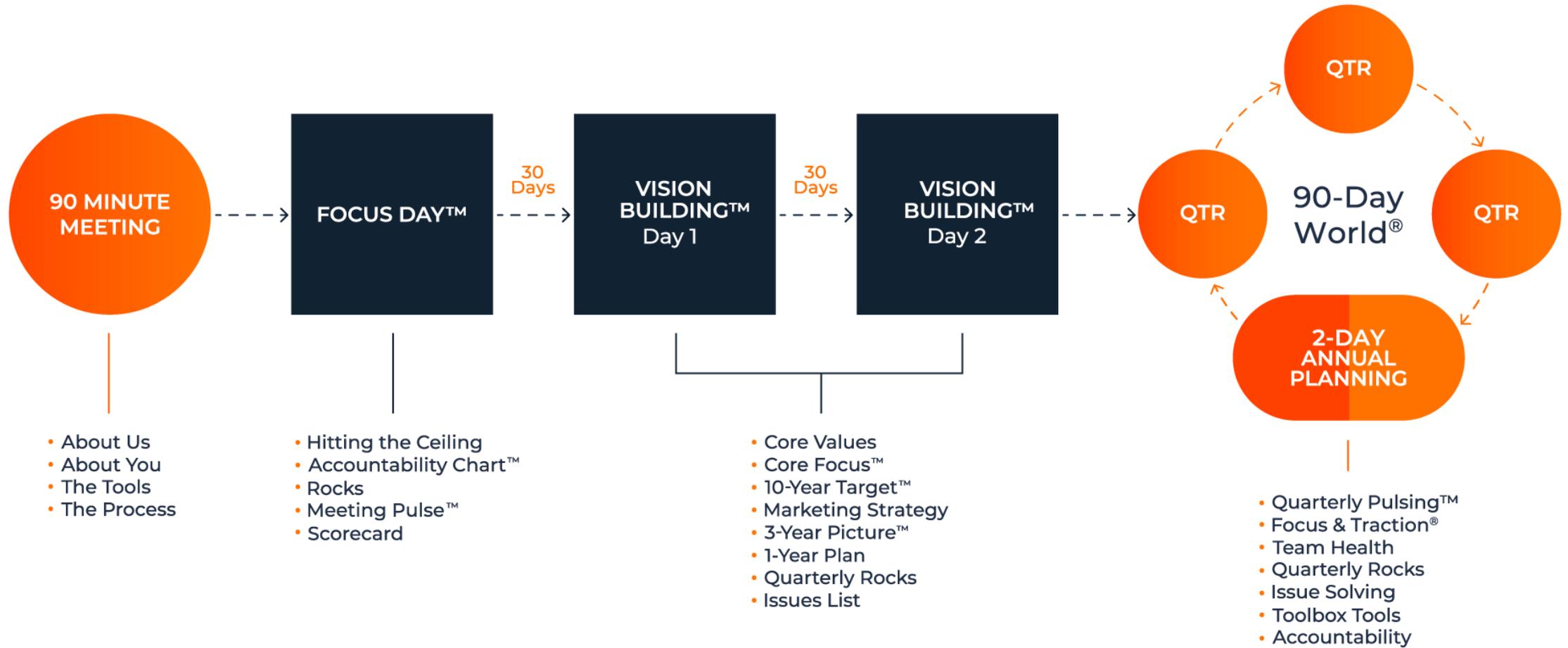
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THE EOS MODEL



THE EOS PROCESS®



FINAL THOUGHTS

💡 Take the checkup

💡 Consider a system

💡 “Systemize the predictable so you can humanize the exceptional” – Isadore Sharp – 4 Seasons Hotels



Questions

Please type in the chat

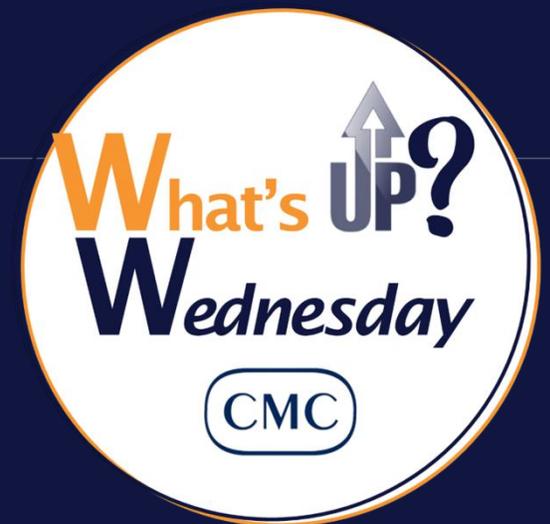
Guest Speaker

Scott Morin, Principal of Bytown Ventures

www.bytownventures.com

EOS Worldwide:

<https://www.eosworldwide.com/>



THANK YOU



INFO@CMC-ONTARIO.CA

[HTTPS://CMC-CANADA.CA/ONTARIO](https://CMC-CANADA.CA/ONTARIO)

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