



# Gewoon aan de slag

*Voor de verandering van binnenuit*

## **BOOK: TRACTION – get a grip on your business**

Gino Wickman (2011)

**Samenvatting boek: Traction - Gino Wickman.**

Onderwerp: het EOS model om 'grip te krijgen op je organisatie'

EOS = Entrepreneurial Operating System

**Indruk:**

Heldere methodiek, goed uitgewerkt in bijbehorende tools etc. Vooral begin spreekt me aan, met heldere visie, scherpe keuzes moeten maken voor verheldering en die overal ook in doorvoeren.

Tweede deel, waar het gaat om het consequent doorvoeren in hele organisatie, gaat wat mij betreft mank op een heleboel onderliggende elementen die 'in place' moeten zijn om het te laten werken.

Worden deels ook benoemd (bv vertrouwen 'moet er zijn'), maar niet uitgewerkt in hoe. Terwijl ik denk dat als die er zijn, de rest ook niet meer zo heel erg spannend is.

Bovendien gaat het uit van een hoop 2.0 paradigma's: als mensen het maar snappen, gaan ze er ook wel in geloven / het doen.

De hele 'meeting pulse' is gebaseerd op behoorlijk rationele aanpak, waar volgens mij het meer irrationele onder ligt van betekenisgeving, werkelijkheidsconstructen etc. De link leggen tussen het rationele en irrationele is m.i. waar we met Veranderen 3.0 en de 'Clean' tools een belangrijke bijdrage leveren.

Kortom: interessante tools, kunnen denk ik ook echt helpen. Als de cultuur er al klaar voor is. En dan nog is m.i. een heel stuk meer dialoog, samen uitwerken, uitwisselen, feedback etc. nodig om het voorbij een 1.0 aanpak te brengen. Plus naar mijn smaak te probleemgericht.

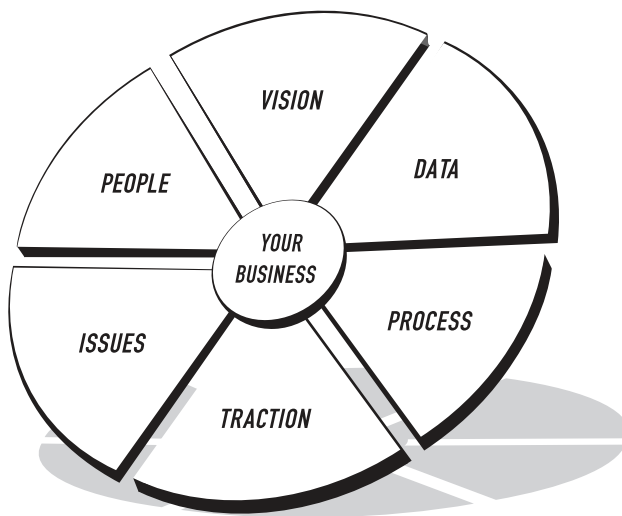
Boeiend om ook eens op onszelf los te laten! Ook al is het meer voor grotere, en in mijn ogen meer 'rechttoe rechtaan' organisaties gemaakt.

Gedachten voor wat wij meer kunnen gebruiken:

- Proces van komen tot de kernwaarden (die ook echt iets zeggen) & hoe die doorvertalen in 'people'
- Focus op 'traction' voor gaan kijken naar & werken aan visie: eerst laten zien dat ze er iets mee gaan doen, anders is het verloren tijd & energie.
- Mensen een 'getal' geven om verantwoordelijk voor te zijn, incl hele creatieve
- Rocks & meeting pulse
- (Delen van) tools gebruiken om focus voor klanten tastbaarder te laten zijn

**Samenvatting:**

Het model, met aan de bovenkant de 'visie' component en aan de onderkant de 'traction':



Om het te laten werken, moet het hele leiderschapsteam principes toepassen (5 core leadership abilities):

- SIMPLIFY: Less is more
- DELEGATE
- PREDICT (long term & short term): making decisions on what to do tomorrow, based on what you know today
- SYSTEMISE
- STRUCTURE: to reduce complexity & create accountability

De elementen & bijbehorende tools:

Onderdeel	Gaat om:	Tools:
Vooraf	Waar sta je nu (+achteraf)	Organisational check-up
VISION	Hebben van visie Communiceren: zien zij wat jij ziet? Waar naartoe & hoe? Alignment: allemaal dezelfde kant op roeien	Vision/Traction Organiser (p. 32-33)
PEOPLE	Juiste mensen op de juiste plekken Delen van de core values Get it, want it, capacity to do it	People Analyser, GWC
DATA	Metrics om je business te managen Snel problemen spotten & op reageren Empoweren van ieder persoon in de org. Duidelijk, betekenisvoll, manageable getal om accountable voor te zijn	Scorecard Accountability chart
ISSUES	Zie ze & los ze op Bespreek ze op een eerlijke manier, in een gezonde omgeving	Issues list Issues solving track
PROCESS	Manier waarop je werkt Constant verfijnen	3-step process documenter

	Is het meest genegeerd Simpliciteit, schaalbaarheid, efficiëntie, winstgevendheid Definieren, mensen trainen om het te volgen	
TRACTION	Uitvoeren! Focus, accountability & discipline Vaak de zwakste schakel 'Vision without traction is mere hallucination' Rocks – 90 day priorities Meeting pulse voor focus, alignment & communicatie	Rocks Meeting pulse Level 10 meeting agenda

### LETTING GO OF THE VINE

Take the leap from 'you are your company' to 'company is it's own identity'

4 fundamental beliefs:

1. Build & maintain a true leadership team
2. Hitting the ceiling is inevitable
3. Run your organization on 1 OS
4. Open-minded, growth-oriented, vulnerable  
Risk to grow to be yourself (NB: is where 'clean' can help!)

## VISION

### Vision/Traction Organiser

- Vision:**
- Core values** – small set of vital & timeless guiding principles for the company; used to hire, fire, review, reward & recognize people  
How to?
    1. Everyone list 3 people you would want to clone
    2. List characteristics & qualities they exemplify
    3. Circle which are truly important – end up with 3-7
    4. Make tough decisions
    5. Let simmer for 30 days, come back to sign them off
    6. Back each one up with stories, analogies & creative illustrations; 3-5 supporting examples under each
 People then need to fit with these values (core value alignment)
  - Core focus** – 8<sup>th</sup> habit: 'the voice'. What to devote your time and resources to excelling at it; what you're genetically encoded to do (good to great); don't get distracted by the shiny stuff.  
How to? (don't overthink it)
    1. Why does your organization exist? (purpose, cause, passion) – p50
    2. What is your organization's niche?
  - 10 year target** – focus on ends, not means; maybe change it to 5 years; specific and measurable. Profit, revenue, market share, number of clients/referrals etc.
  - marketing strategy** – stand out to your ideal customer.  
Elements:
    1. Target market (p. 58) / 'The list' – key contact info for each prospect, how to get referred to them
    2. Your three uniques – value proposition, no one else should have the three (combined) you do. Ask clients (check testimonials). Examples on p 60
    3. Your proven process – the steps you always use – see p 63 ex.

4. Your guarantee – set your client's minds at ease. Forces you to deliver on it! Maybe make it a pledge, commitment or promise. Again, ask feedback to define them.

**3 year picture** – don't overthink it. Profit number, specific measurables. What will the organization look like on a specific date 3 years from now? (quality & quantity of people, added resources, office environment and size, systemization, product mix, client mix etc). Plus individual role in that timeframe. Must have oomph.

**1 year plan** incl goals – traction side, making it real. What must get done this year. Less is more: 3 – 7 important priorities. Specific, measurable & attainable. Budget in place.

**Rocks for the quarter** – next 90 days. Align vision with reality

How to:

1. List everything with LT that has to be accomplished in the next 90 days (say 10 to 20 emerge)
2. Discuss, debate & determine important priorities. Keep, kill or combine. End up with 3 – 7
3. Set due dates, define each one to specific, measurable & attainable rocks. (how do we know...?)
4. Assign who owns each rock (1 only)
5. Set own rocks per member of LT – 3-7 (incl company rocks assigned to them)
6. Create Rock Sheet on landscaped piece of paper. Now no new priorities can be added!
7. Share company rocks with entire organization
8. Have each department set rocks as a team

Example: p. 174

If everyone does this, there is a lot of steps in right direction (like with 'Jump!' idea)

**Issue list** – name obstacles, concerns and opportunities to achieve vision.

Everyone must know, understand it and share it. Be willing to be vulnerable. Communicate in 3 events:

1. Company kick-off meeting, incl q&a time
2. Every 90 days, short (45 mins max) state-of-the-company meeting with all employees
  - a. Share success & progress,
  - b. Review V/TO
  - c. Communicate newly set company Rocks
3. Each quarter, set Rocks in each department / conduct complete review of V/TO as a team

## PEOPLE

Right people are the onew who share your company's core values. Fit & thrive in your organization.

Right seat: operate within their area of greatest skill and passion inside your organization. Roles & responsibilities fit with their Unique Ability.

Hire, fire, review, reward and recognize all of your people around core values and unique abilities.

### People Analyzer (right persons)

NAME	Value #1	Value #2	Value #3	Value #4	Value #5
John	+	+	+	+	+
Sally	-	-	-	-	-
George	+/-	+/-	+/-	+/-	+/-

(W: also: separate inference from evidence & look at re-evaluating your core values based on the impact of + or -'s)

Determine what the bar is. Minimum standard you will accept. Recommended bar with five core values: three +’es, two +/-’es and never a -.

### **Three strike rule**

Communicate People Analyzer results to person & give them chance to better.

Strike one: 30 days to correct the problem

Strike two: no improvement, discuss again and give another 30 days

Strike three: no improvement = no change = termination.

How to introduce:

1. After discovering core values, people-analyze each other
2. Have leadership team people-analyze everyone in organization & share results in 1-on-1 sessions (W: wow, very one-sided! No dialogue...?)
3. Use in quarterly performance reviews, let them analyze you as well.
4. When facing a personnel problem, run person through People Analyzer

### **Accountability Chart (right seats)**

Three major functions: sales/marketing, operations, finance. All three must be strong. Only one person ultimately in charge of any major function. Can be split into more.

Fourth function: integrator. To integrate three major functions, manage day-to-day issues etc.

End up with 3-10 major functions (mostly no more than 7).

One person per seat, more seats per person = possible.

If your work requires more than 100% to do it well, something has to give. You have to delegate to elevate. Doing more than 100% means holding the organization back.

### **Visionaries vs Integrators**

Often divided between partners.

Visionary: 10 new ideas a week, 1 might be great & keeps the organization growing. Solvers of big ugly problems (nog little ones). Operate more on emotion. ‘Know thyself and be free’

Integrators: very good at leading, managing and holding people accountable. Remove obstacles so 3 major functions can execute. Operate more on logic. ‘Know thyself and be stressed’ (!?)

Visionary’s lust needs to be counterbalanced with an integrator’s prudence and discipline. When structured correctly, dynamic that exists between the two Unique Abilities = magical.

Visionary function’s five roles might be:

R&D / Ideas

Creative problem solving

Major relationships

Culture

Selling

Every role has responsibility of LMA (Leading, Managing, holding people Accountable). See example p 97

Accountability chart will not define communication structure. This must flow freely across all lines & departments. Creating an open & honest culture. (W: right....., this is where clean / systemic modelling comes in useful / charts vs reality in organizations...).

### **GWC**

All accountabilities mentioned in the chart, need to be filtered through the GWC:

**Get it** (understand their role, culture, systems, pace & how it comes together)

**Want it** (motivated intrinsically; genuinely like it)  
**Capacity to do it** (time, mental, physical & emotional capacity)

Share the chart, then **'let go of the vine'** and let them execute!

## DATA

Formulate & manage your data. No longer manage assumptions.

### Scorecard

'with a scorecard, you can change the future' (W: hmmmmmm.....)

Create a scorecard that fits your unique business:

1. 1 hour: say you only have a piece of paper with handful of numbers to have an absolute pulse on your business: what numbers must be on that piece of paper?  
End up with 5 – 15 numbers (see ex. P 118).
2. List who is accountable for each number (only 1 per number!). He / she must deliver that (weekly?!) number.
3. Decide & fill in expected goal for the week in each category.
4. Put next week's date in, in preparation for filling
5. Decide who is accountable for collecting numbers & fill in scorecard every week
6. Use it! Every week... Find patterns & trends.

Goal is to predict & tell what you need to do. Not just hindsight.

### Everyone has a number

Because: 'what gets measured gets done' (W: interesting assumption!).

A single, meaningful, manageable number to guide them.

8 advantages, see p 123-125. First one is that they cut through murky communication between manager & direct reports. (W: relates to why we do the 'verdeel de pot' discussions!). Plus makes expectations clear and create teamwork.

Result: nowhere to hide.... 'creating a transparent organization, open & honest'. (W: necessary condition or result...?).

## ISSUES

Find out what's holding you back. (W: is not same as backlog to get *towards* vision)

Reach decisions promptly & changing them slowly makes for success.

### Issues List

Create workplace where people feel comfortable calling out issues. First, leadership team needs to be comfortable with this type of environment!!! Start with LT meetings.

High level of trust is foundation of what makes teams healthy and functional ('Five Dysfunctions of a Team' – Lencioni). (W: no chart or list will do this... and can help).

So: trust starts with you.

3 types of issues lists:

1. In the V/TO – the ones that don't get dealt with this quarter
2. Weekly leadership team Issues List – relevant issues for this week & quarter that must be tackled at the highest level.

3. Departmental Issues List – more local level. For the week, e.g. hitting call numbers, presentations, fulfilling orders, purchasing, etc.

Intro, you could make it mandatory that everyone brings two issues, to get this started when no-one does it by themselves.

## Issues Solving Track

Examine list and decide quickly on top three issues to be solved. Start with most important:

1. Identify – underlying issue (incl: people...!). Peel the onion. (W: vs also defining the Desired Outcome with the Issue...). Take enough time for this!  
(W: use clean to separate Evidence from Inference from Impact)  
Three types of issues, owner needs to make this clear and what is needed:
  - a. True problem that has to be solved
  - b. Information that needs to be communicated & agreed by team
  - c. Idea or information that needs feedback, insight or green light
2. Discuss – say everything you have to say about the issue (but only once!!), then fight for the greater good.
3. Solve – in relation to your Vision! Let someone make the solution statement.  
See 10 commandments of solving issues p. 141-143. Incl: thou shalt not be a weenie & thou shalt live with it, end it, or change it.

## PROCESS

Focus on consistency. 'Nothing can be fine-tuned until it's first consistent'. (W: vs. Lean Start-Up philosophy.... These really clash!)

### Identify your core processes

Take initial step als LT together so that you're calling your core processes the same thing.

Eg: HR process, marketing process, sales process, operations process, accounting process, customer-retention process. Call them all by the same, consistent names to reduce complexity.

### Document each core process

At a very high level: go for the most important 20 percent, may take about two to max ten pages – see example p.154-155.

Aim is for a business to become self-sustaining.

Technology should create efficiencies and simplification, not hype.

### Package it

But them in a binder / on the intranet and call it 'The [company's name] Way'.

'Now, everyone can be trained to follow the correct process.' (W: very 1.0.....)

And 'leadership team must be convinced that everyone should follow one system. Committed to managing all of the people to make the adjustment...'

'Show how the new system will create efficiencies to make for more success and easier lives' (W: 2.0!).

Make it into a clear visual.



## TRACTION

Create accountability and discipline, then execute. Don't let fear of creating discomfort stop you. Requires a total commitment from the LT.

Two disciplines needed:

Everyone must set specific, measurable priorities (ROCKS)

Meet better as an organization (MEETING PULSE)

### ROCKS

Three to seven most important priorities for next 90 days:

- As a company
- Each member of LT
- Each employee

Limit priorities, helps focus on what's most important.

Team meets for a full day every 90 days:

- Review vision
- Determine rocks for organization in next 90-day period

*As mentioned before, How to establish your rocks:*

1. List everything with LT that has to be accomplished in the next 90 days (say 10 to 20 emerge)
2. Discuss, debate & determine important priorities. Keep, kill or combine. End up with 3 – 7
3. Set due dates, define each one to specific, measurable & attainable rocks. (how do we know...?)
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*Example: p. 174*

*If everyone does this, there is a lot of steps in right direction (like with 'Jump!' idea)*

### MEETING PULSE

#### 90-Day World - quarterly

With the LT, Off-site, full day, prepare issues and proposed priorities for coming quarter based on V/TO.

Agenda:

- Segue: each person shares:
- Best business & personal news in last 90 days
- What is working & not working within the organization
- Expectations for the day (W: clean set-up useful here!)
- Review previous quarter – e.g. simply state 'done' or 'not done' for each rock from previous quarter. If you didn't complete 80%, understand why and learn from it.
- Review the V/TO – refresh your memory. Between 30 mins and 2 hours. Conclude by updating Issues List (section 8)
- Establish next quarter's Rocks – list all, decide on 3 – 7
- Tackle key issues – like other issues: decide top 3, Identify real problem, Discuss all aspects, Solve it. If not solved, carry forward to weekly Issues List or the V/TO Issues List.
- Next steps – who is doing what, are there any messages to communicate on decisions made.
- Conclude – everyone shares:
- Feedback on the meeting (W: make it clean...!)
- Whether expectations were met or not (W: isn't that in FB already?)

- Rating on the meeting from 1-10 (you want to average above 8)

Once a year, piggyback an extra day on the front end of the quarterly meeting for the annual planning:

### **Annual meeting pulse - yearly**

LT, off-site, 2 days (total), bring completed V/TO, proposed budget for next year and thoughts on goals for next year

Agenda:

- Segue – each shares:
- Organisations 3 greatest accomplishments in previous year
- Own greatest personal accomplishment for the year
- Expectations for the two-day session
- Review previous year – again only ‘done’ or ‘not-done’ answers. Establish degree of success or failure so you can get better at it next time.
- Team health building – team building exercise. E.g. ‘One Thing’: each member receives feedback from the others on their single greatest strength or most admirable ability and their biggest weakness or hindrance to the success of the company. (W: please use Clean Feedback!!). Then each chooses one thing to commit to doing differently in coming year based on this. (W: or more of...?).
- SWOT / Issues List – extract issues for coming year from SWOT analysis to build Issues List
- V/TO (through one-year plan) – challenge the company vision. Discuss and debate until everyone is in sync. Then create a new one-year plan: revenue, profit, numbers for coming year. And 3 – 7 most important goals. Make sure necessary budget exists.

Day 2:

Like quarterly, without the segue / reviews

(W: I miss the dialogue about the relationship between the chosen actions & vision: do we mean the same still, when we translate the vision into actions (done & to do)?)

### **Level 10 Meeting – weekly 90 minutes**

Don't reschedule, don't cancel.

Prep: everyone has copy of agenda, your to-dos and IDS Issues List (in printed agenda). Turn off all electronic devices.

Agenda:

- Segue (5 mins) : share good news
  - Scorecard (5 mins) – what's on track, what not -> dropped into the IDS portion of the meeting. No discussion here.
  - Rock review (5 mins) – on track, off-track, move to IDS
  - Customer/employee headlines (5 mins) – short & sweet headlines. Issues to IDS portion.
  - To-do list (5 mins) – only one week action items). Done / not done. 90% should drop off the list now.
  - IDS 60 mins) – where the magic happens. Tackle the Issues List. Which are no. 1, 2 and 3 of the list? ‘There should be no politics’ .... (W: sure... so what if there are?)
  - Conclude (5 mins) – recap new To-Do-List. Discuss what needs to be communicated, how , what medium & who.
- Rate the meeting on scale of 1 to 10.

## Volgorde van het invoeren:

1. Accountability chart (incl People Analyzer & GWC)
2. Rocks
3. Meeting Pulse (incl IDS, Level 10 meeting, quarterlies & annuals)
4. Scorecard
5. V/TO (incl core values, core focus, 10 year target, marketing strategy, three-year picture, one-year plan)
6. Three-Step Process Documenter
7. Everyone has a number