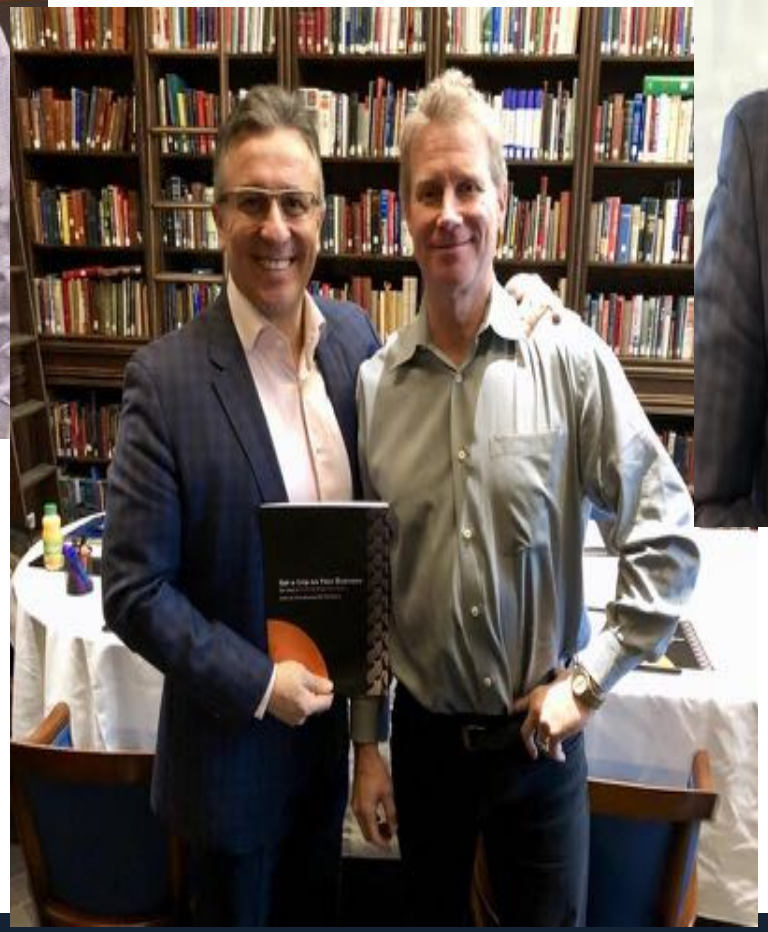
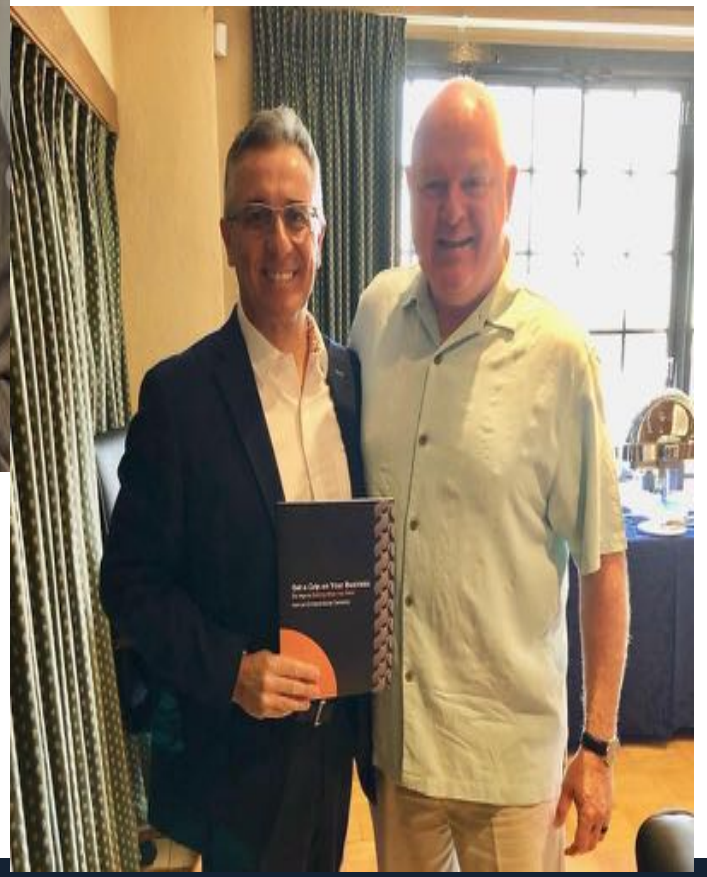
THE TALK

7 Steps to a ”Kick-Ass” Presentation

Al Moscardelli, Expert EOS Implementer®
Al.moscardelli@EOSWorldwide.com





EOS
GET A GRIP

EOS

ENTREPRENURIAL OPE
(EOS®)
Helping Entrepreneurs cla
gain TRACTION and

BREAKOUT
EOS
GET A GRIP
TRACTION

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GET A GRIP
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Monday 28 May 7:3

THE TALK

7 Steps to a ”Kick-Ass” Presentation

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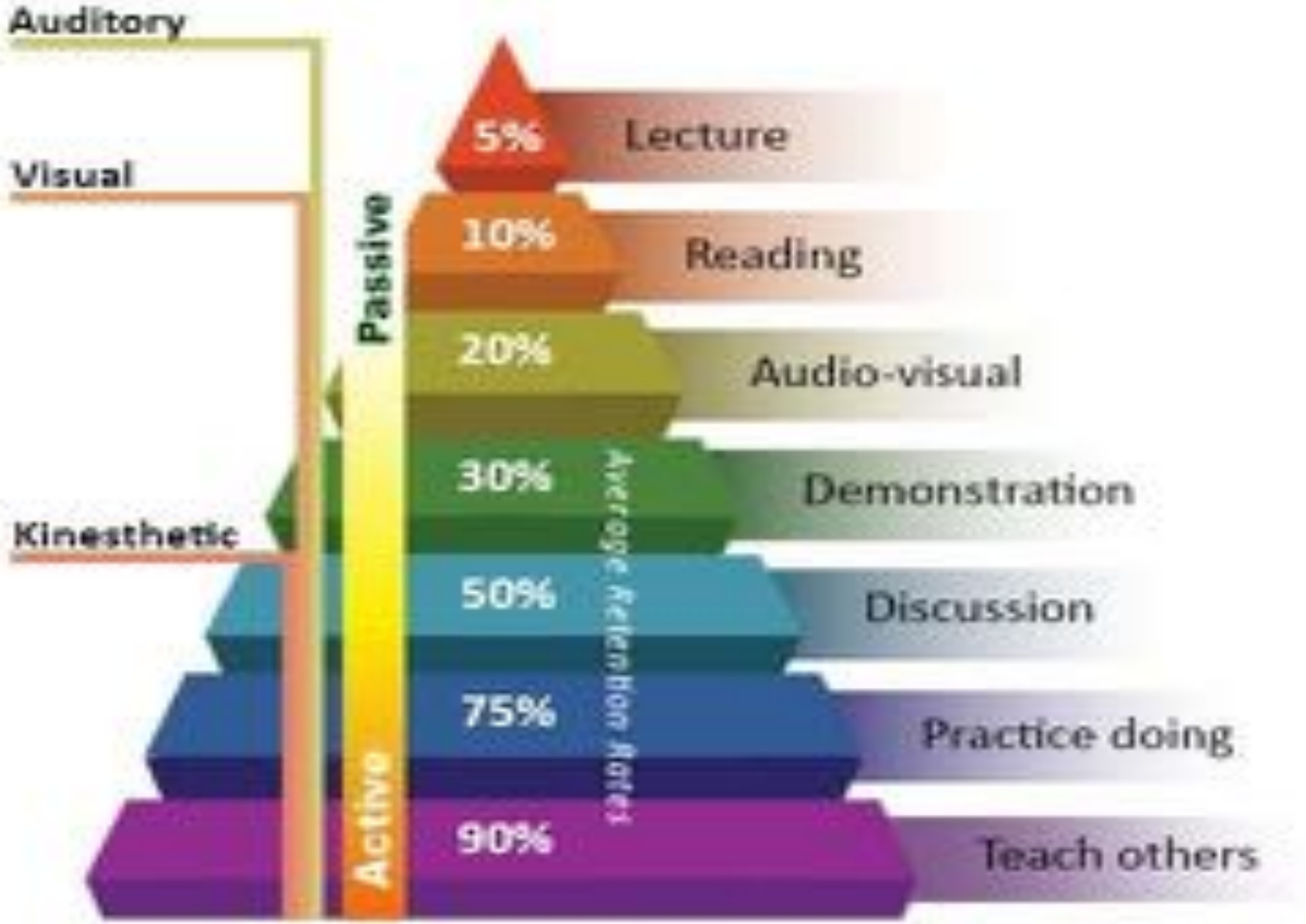
AGENDA

- 1. Preparation
- 2. Set-Up & Equipment
- 3. Mindset
- 4. Presentation & Facilitation Tips
- 5. Dialogue Not Monologue
- 6. Break-Out: Get Them Talking
- 7. Stick the Landing

OBJECTIVES

- Learn How to Deliver a “Kick-Ass” Presentation
- Give you some practical tools to help you “hit it out of the park”
- Have some fun!



Adapted from the NTL Institute of Applied Behavioral Science Learning Pyramid

GET A GRIP ON YOUR BUSINESS

Six Keys to Getting What You Want from your Entrepreneurial Company

Al Moscardelli, Expert EOS Implementer®
Al.moscardelli@EOSWorldwide.com

OBJECTIVES

- Have you look at your business in a different way.
- Give you some practical tools to help you run a better business.
- Have some fun!

AGENDA

- Get REAL
- Keep it SIMPLE
- Get RESULTS

PAGE 1:

CAPTURE THAT THOUGHT...

- **What do you want from your business?**
  - 10 years out: (could be 5-10-20 years).
  - Only 1 thing: Your #1 Business Goal.
- **One Hot Issue that you are currently dealing with...**

GET REAL

OUR STATS

- Companies using EOS tools:
  - +190,000
- Full Day Sessions
  - +150,000
- Traction Books Sold:
  - +1 Million

GET REAL

- **Me-** Brief history
  - 30+ years as an Entrepreneur- 2 Businesses
  - 1st Ontario Based EOS Implementer
  - 80 + Clients
  - 600+ Sessions over the past 5 years
  - Conducted over 30 TEC Presentations
  - Over half my clients are TEC members.

FRUSTRATIONS

- Lack of Control
- Not Enough Profit
- People Issues
- Hitting the ceiling
- Nothing's working

KEEP IT SIMPLE

CEO'S NEED 2 THINGS

- A good peer group.
- A Business Operating System

- **What is EOS?**

EOS®, stands for the Entrepreneurial Operating System.

EOS® is a is way of harmonizing and orchestrating all the moving parts of your business- to help you run a better business and frankly, live a better life.

Implementing EOS will help you and your leadership team get better at three things:

VISION

Get everyone in your organization 100% on the same page with where you're going and how you plan to get there.

TRACTION

Instill focus, discipline, and accountability throughout the company so that everyone executes on that vision - every day.

HEALTHY

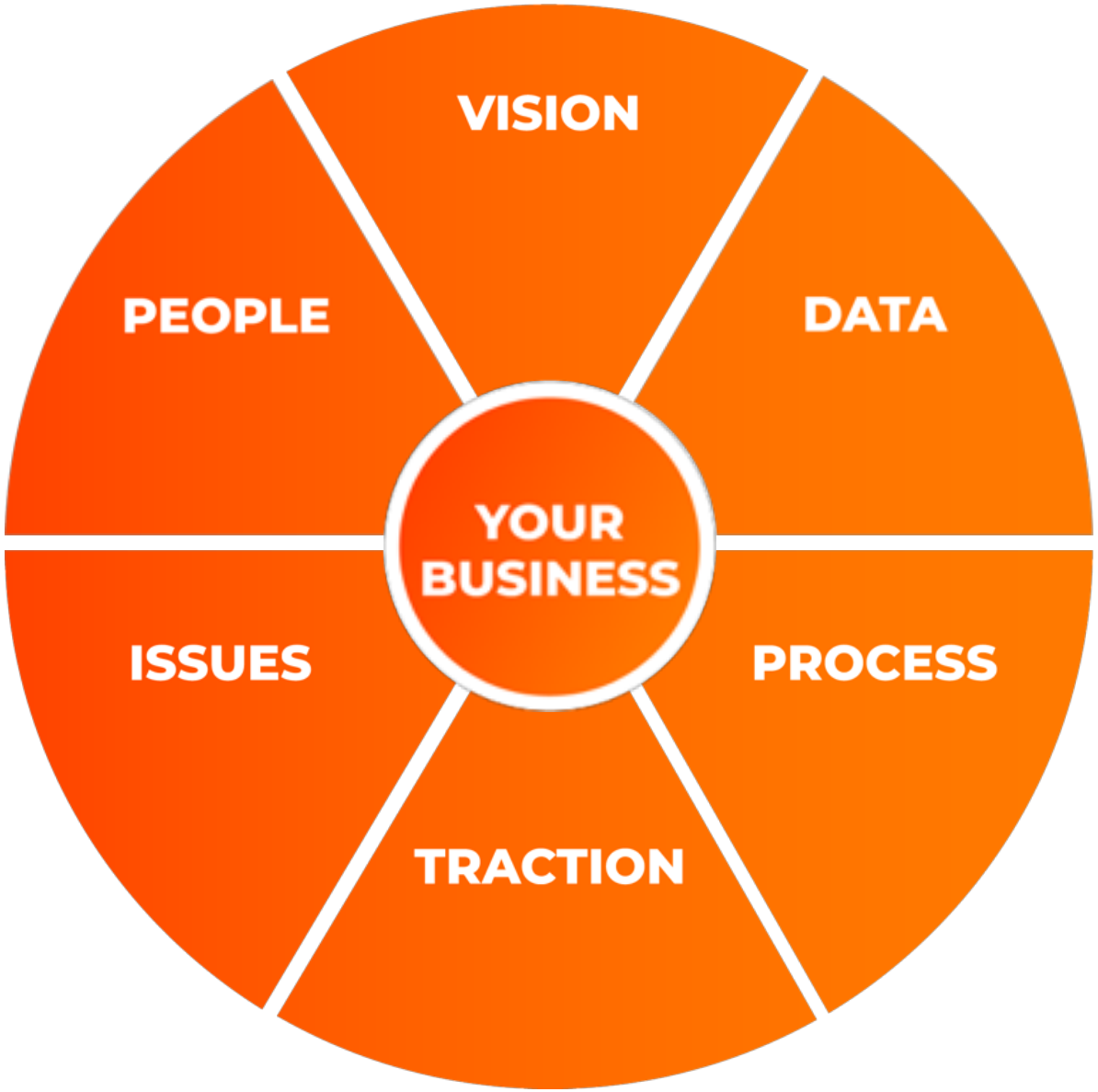
Help your leaders become a more cohesive, functional, healthy leadership team.

DISCOVERY.....

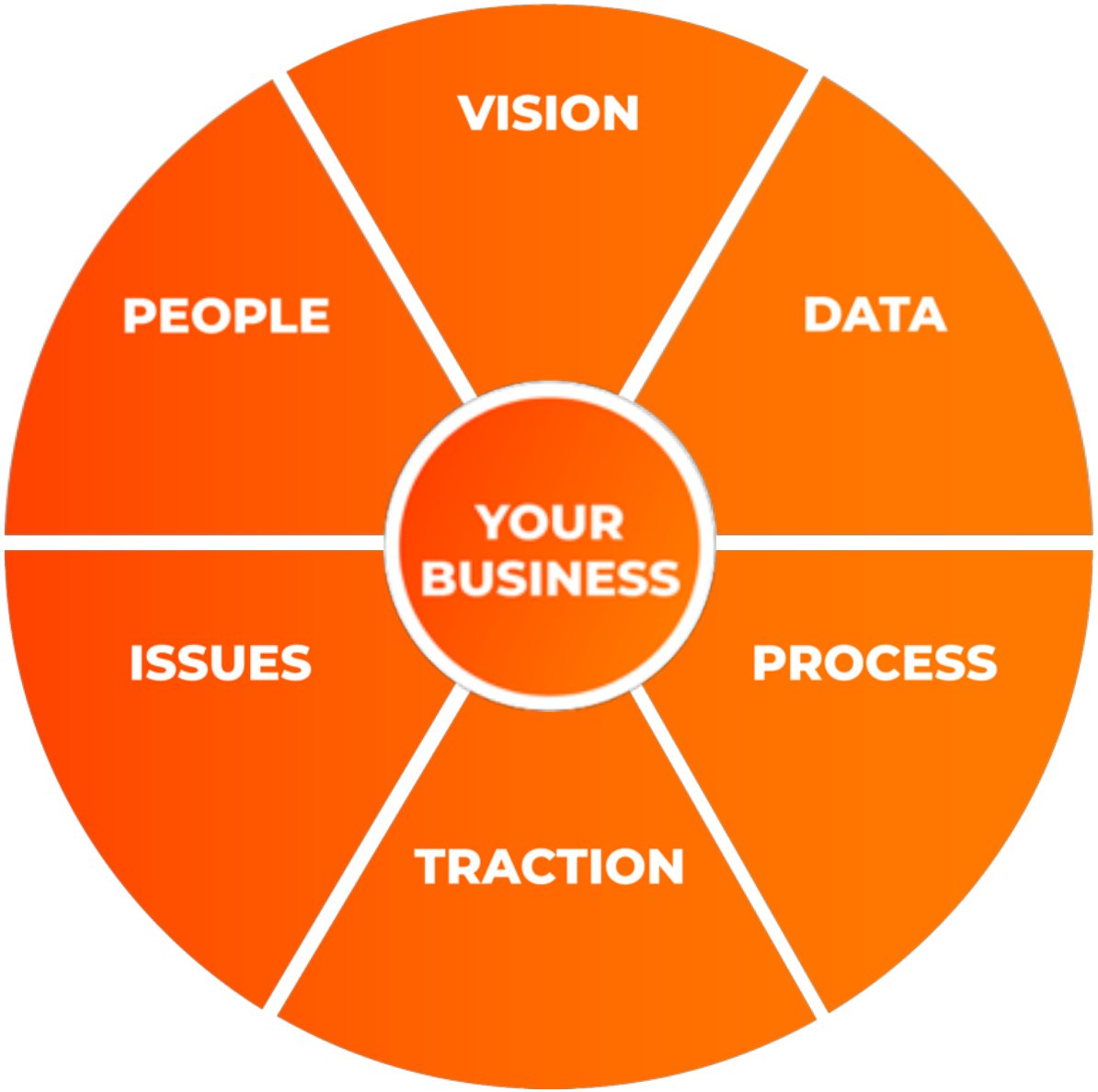
That Most Entrepreneurs / Entrepreneurial leaders, tend to wrestle with .....

136 Issues Simultaneously

THE EOS MODEL®



THE EOS MODEL



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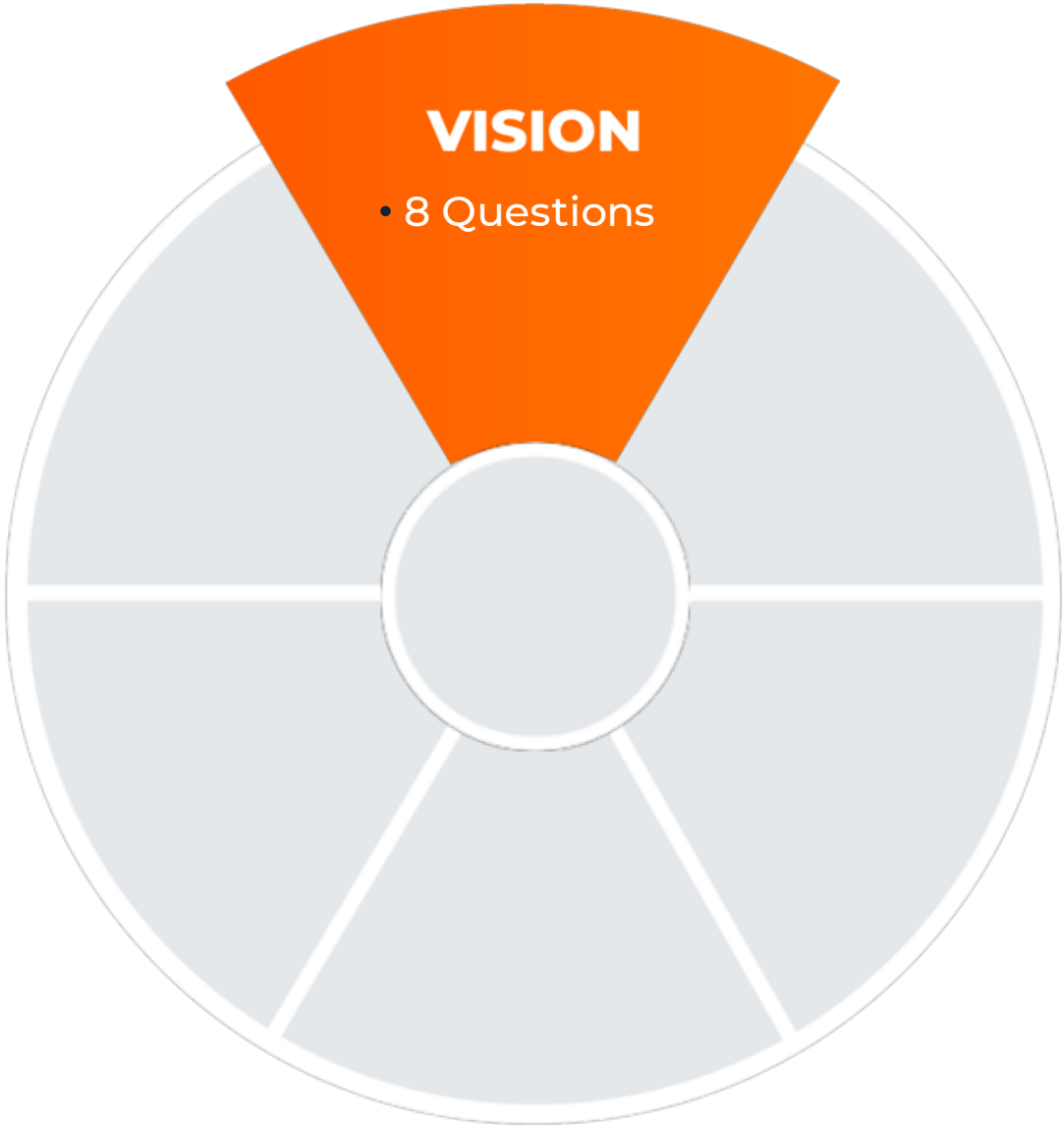


THE VISION/TRACTION ORGANIZER™

CORE VALUES	1. 2. 3. 4. 5.	**3-YEAR PICTURE™**
CORE FOCUS™	**Purpose/Cause/Passion:** **Our Niche:**	**Future Date:** **Revenue:** **Profit:** **Measurables:** **What does it look like?** - - - - - - - - -
10-YEAR TARGET™	_____ _____	
MARKETING STRATEGY	**Target Market/"The List":** **3 Uniques™:** 1. 2. 3. **Proven Process:** **Guarantee:**	

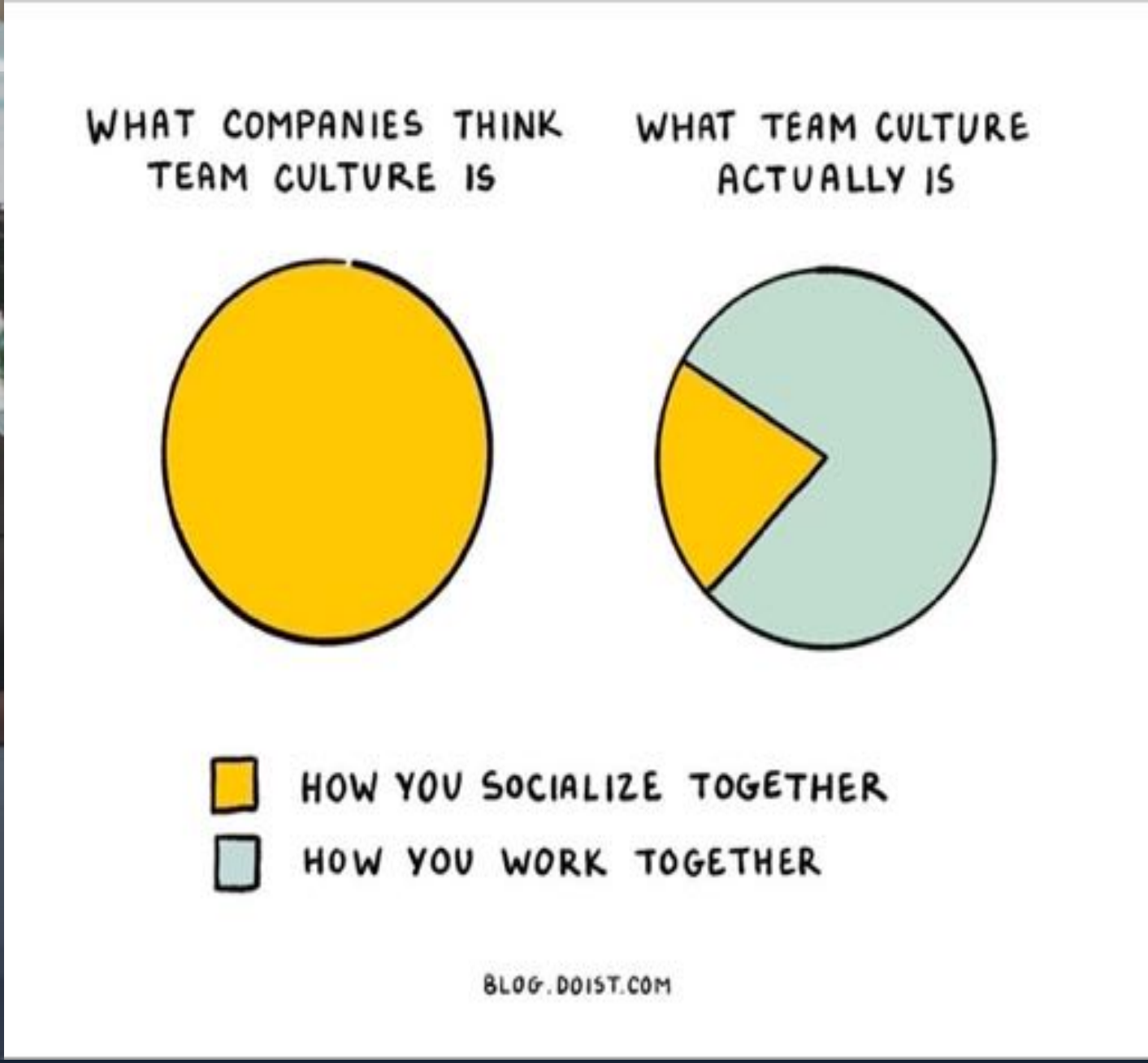
V/TO™

1-YEAR PLAN	ROCKS	ISSUES LIST
Future Date:	**Future Date:**	1. _____
Revenue:	**Revenue:**	2. _____
Profit:	**Profit:**	3. _____
Measurables:	**Measurables:**	4. _____
Goals for the Year:	**Rocks for the Quarter:** **Who**	5. _____
1. _____	1. _____	6. _____
2. _____	2. _____	7. _____
3. _____	3. _____	8. _____
4. _____	4. _____	9. _____
5. _____	5. _____	10. _____
6. _____	6. _____	**Prioritize** - Identify - Discuss - Solve
7. _____	7. _____	

V/TO™

CORE VALUES	1. 2. 3. 4. 5.

- Discover
- Define
- Live and Breathe


WHAT COMPANIES THINK TEAM CULTURE IS
WHAT TEAM CULTURE ACTUALLY IS
HOW YOU SOCIALIZE TOGETHER
HOW YOU WORK TOGETHER
BLOG.DOIST.COM

V/TO™

CORE FOCUS™

Purpose/Cause/Passion:

Our Niche:

V/TO™

10-YEAR TARGET™

- What do you want from your business?
- 5-30 years out
- #1 Goal

V/TO™

MARKETING STRATEGY

Target Market/"The List":

3 Uniques™: 1.
2.
3.

Proven Process:

Guarantee:

V/TO™

CORE VALUES	1. 2. 3. 4. 5.
CORE FOCUS™	Purpose/Cause/Passion: Our Niche:
10-YEAR TARGET™	_____ _____
MARKETING STRATEGY	Target Market/"The List": 3 Uniques™: 1. 2. 3. Proven Process: Guarantee:

3-YEAR PICTURE™

Future Date:

Revenue:

Profit:

Measurables:

What does it look like?

-

-

-

-

-

-

-

-

V/TO™

1-YEAR PLAN	ROCKS	ISSUES LIST
Future Date:	**Future Date:**	1. _____
Revenue:	**Revenue:**	2. _____
Profit:	**Profit:**	3. _____
Measurables:	**Measurables:**	4. _____
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1. _____	1. _____	6. _____
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5. _____	5. _____	10. _____
6. _____	6. _____	**Prioritize** - Identify - Discuss - Solve
7. _____	7. _____	

V/TO™

1-YEAR PLAN

Future Date:

Revenue:

Profit:

Measurables:

Goals for the Year:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

V/TO™

ROCKS

Future Date:

Revenue:

Profit:

Measurables:

Rocks for the Quarter:	**Who**
1.	
2.	
3.	
4.	
5.	
6.	
7.	

V/TO™

ISSUES LIST

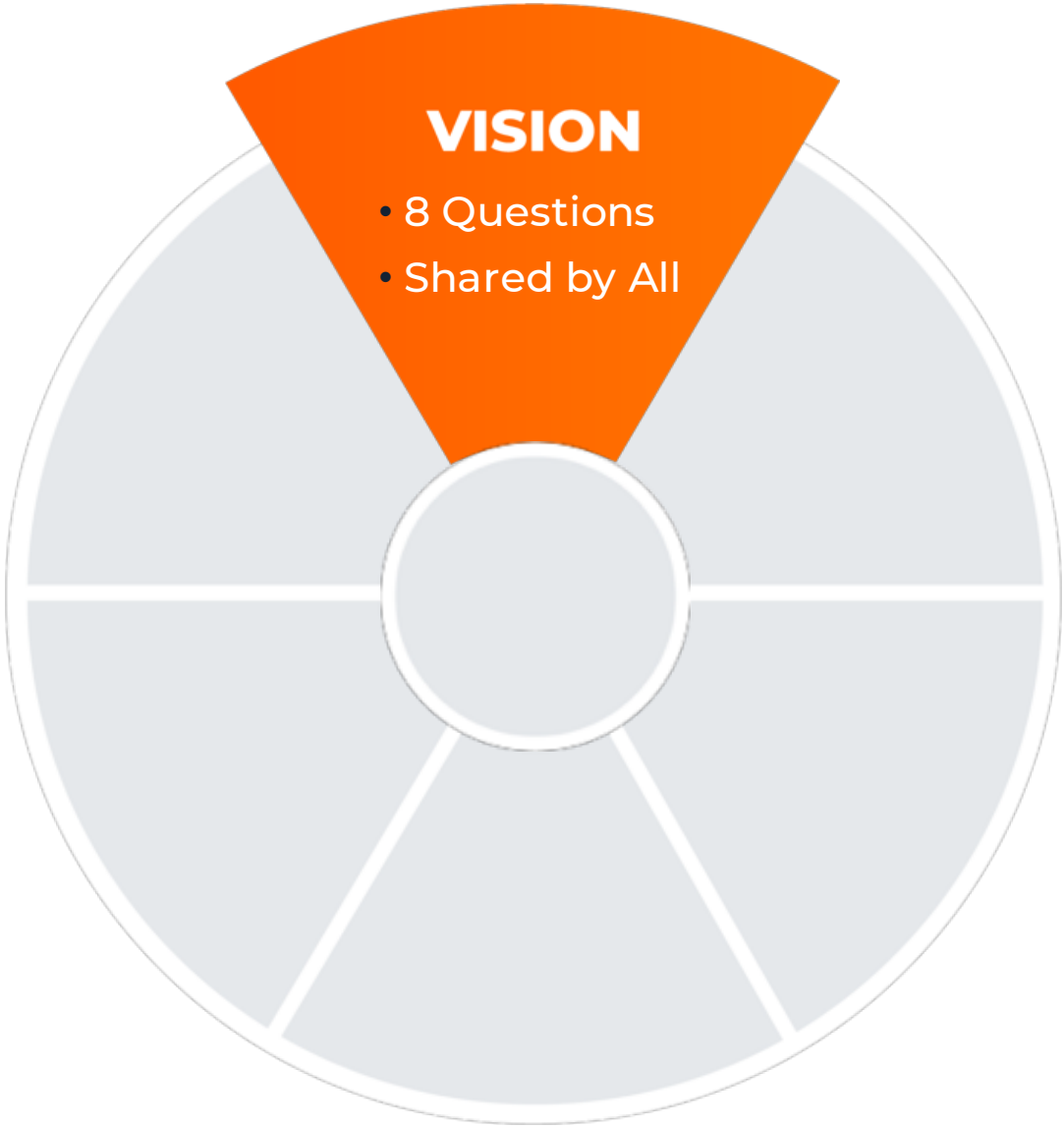
1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Prioritize

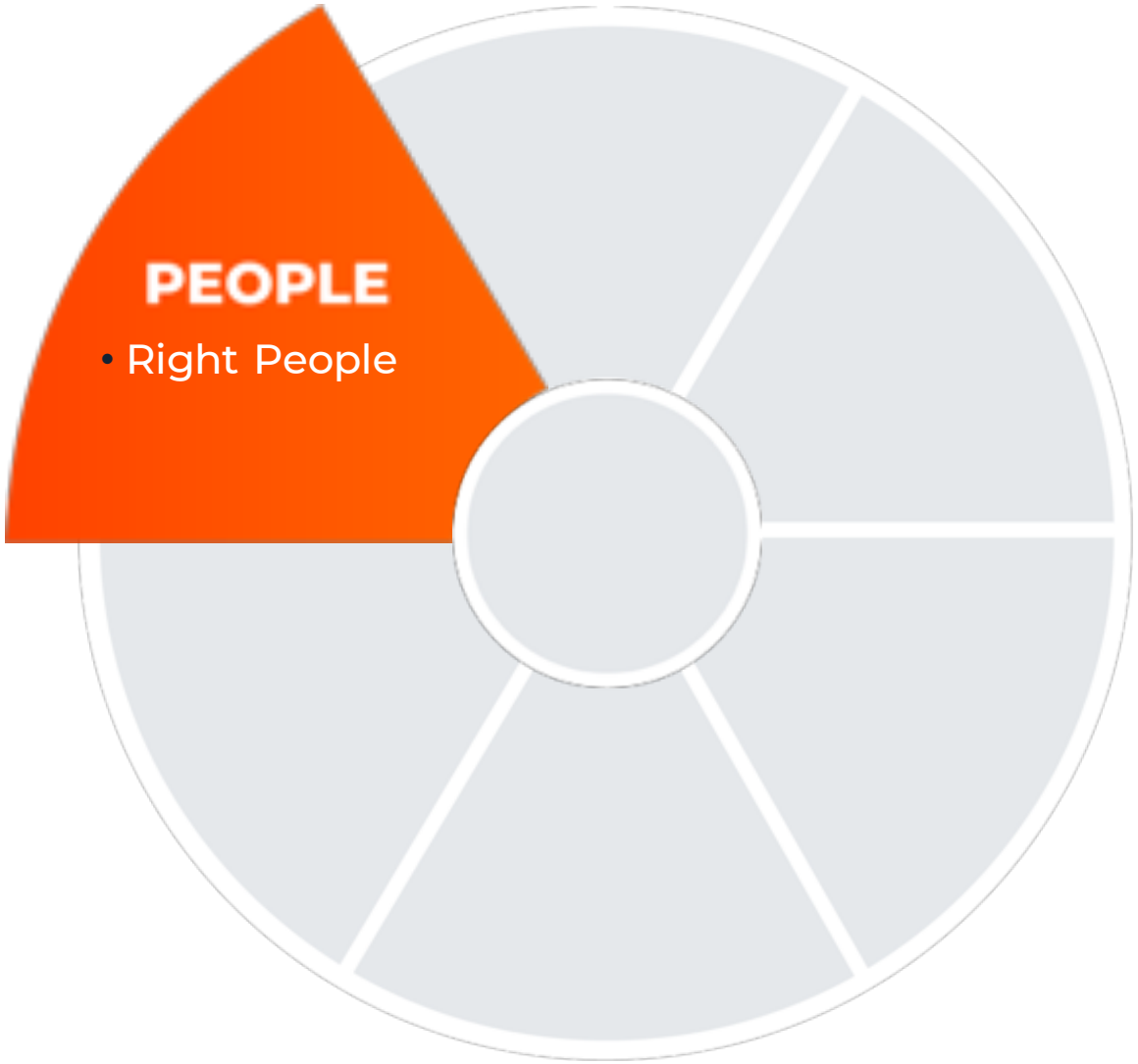
- Identify
- Discuss
- Solve

THE EOS MODEL

100% Strong



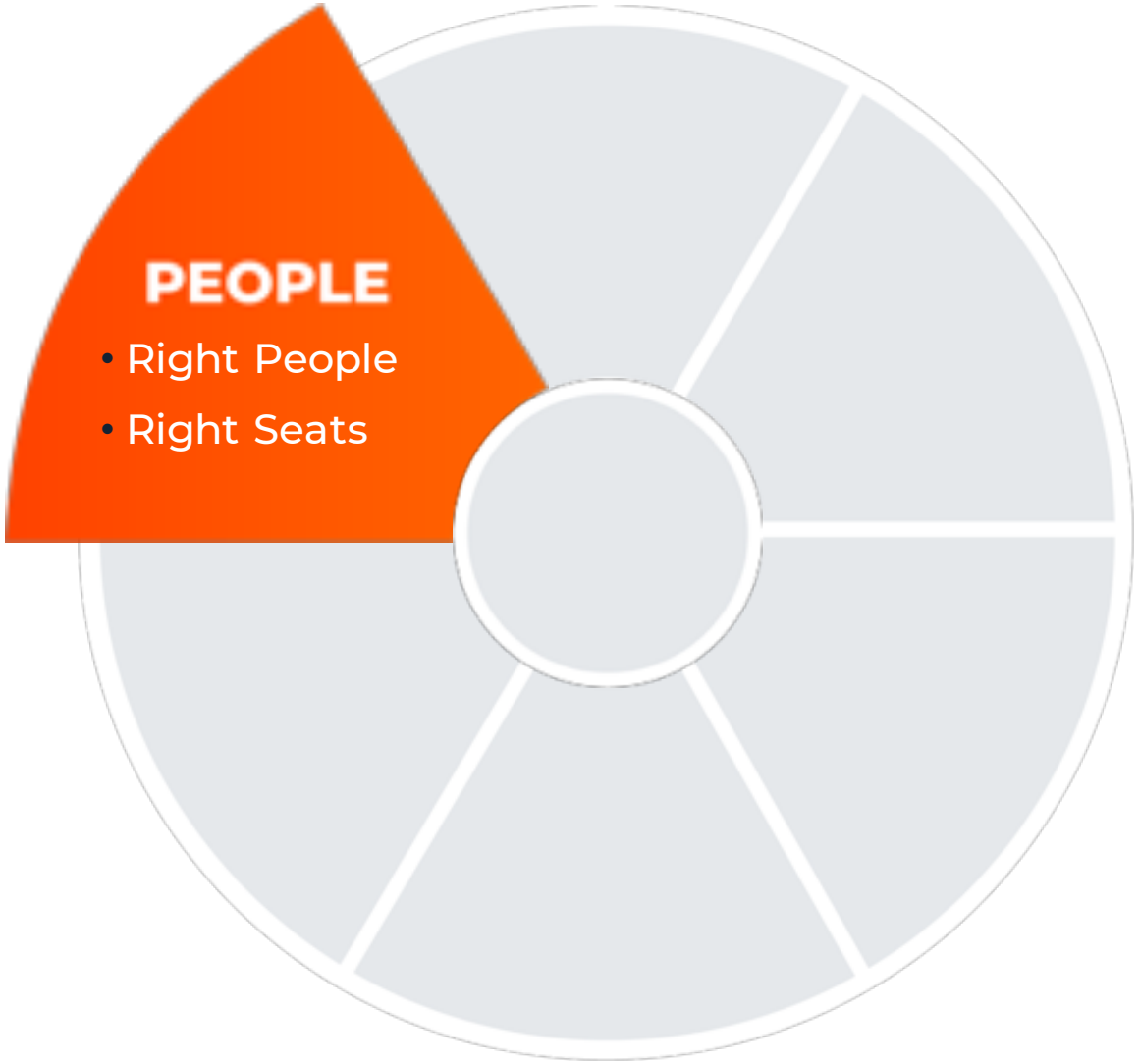
THE EOS MODEL



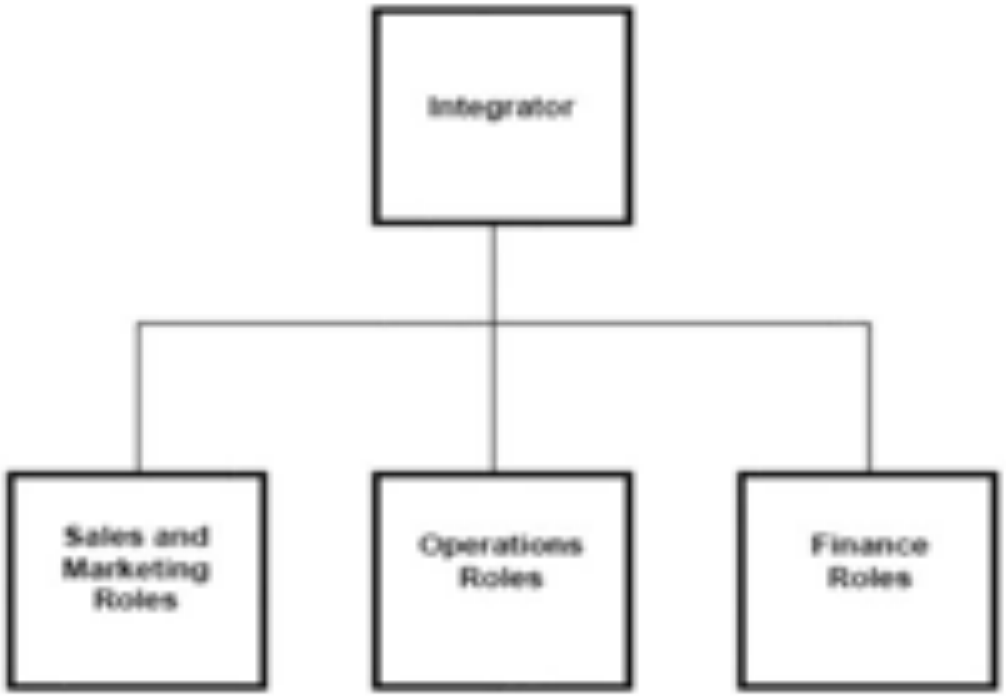
THE PEOPLE ANALYZER™

NAME	Humbly confident	Grow or die	Help first	Do the right thing	Do what you say			
Maria Rodriguez	+	+	+	+	+			
Jalen Taylor	–	+/–	–	–	+/–			
Amina Muhammed	+/–	+/–	+	+/–	+			
THE BAR	+	+/–	+	+/–	+			

THE EOS MODEL

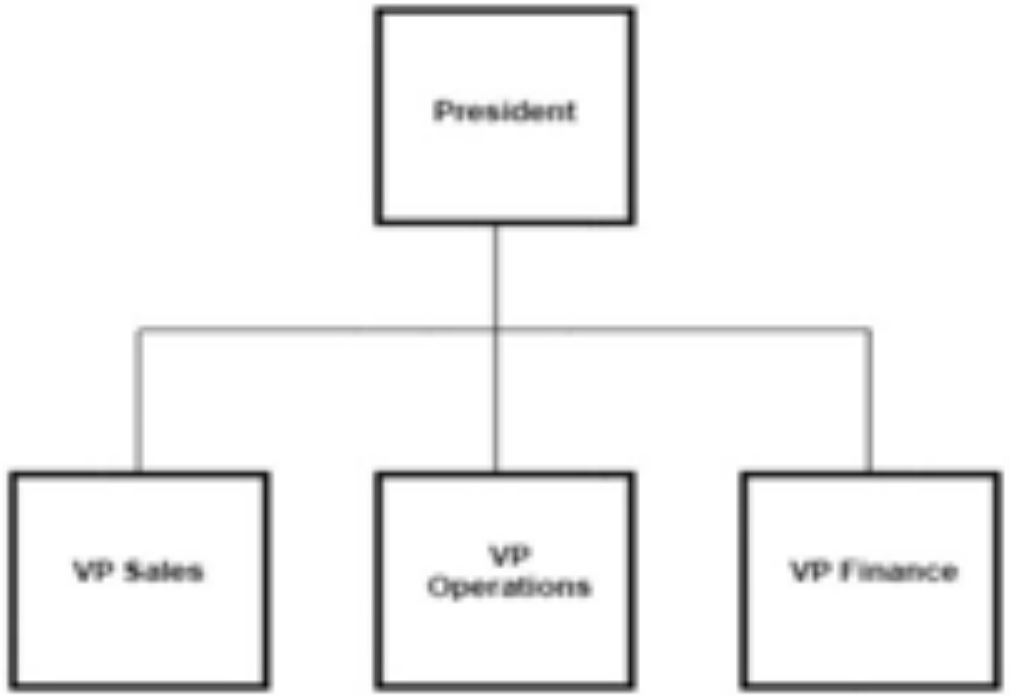


Acountability Chart



The accountability chart clearly defines the roles of the organization and who is responsible for those roles.

Organization Chart



The organization chart clearly defines who reports to whom, but does not define roles or who is responsible for those roles.

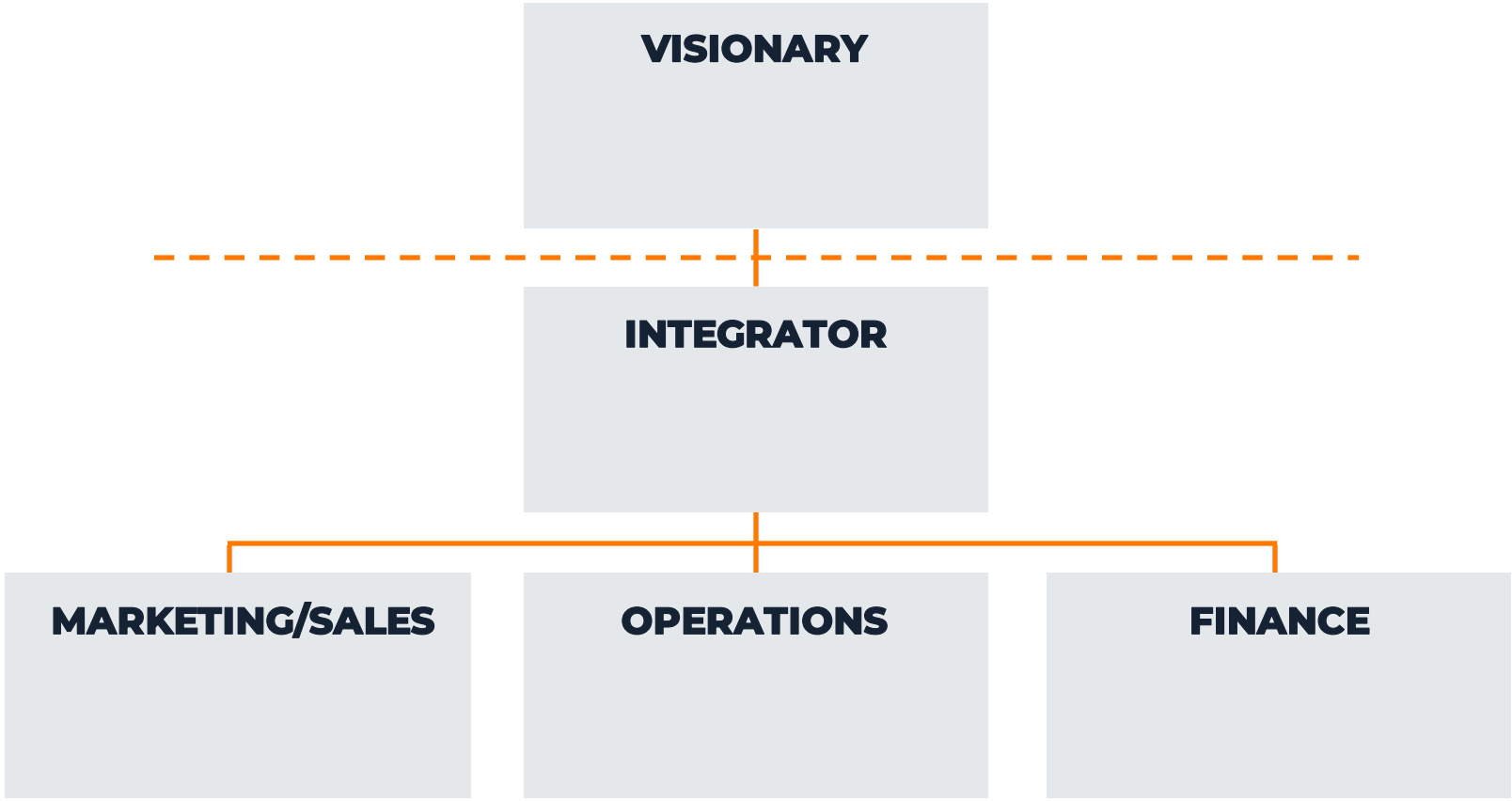
The root cause of all good and evil rests in the Accountability Chart.

The A/C + P/A are two sides of the same coin.

“Structure first, People second.”

–GINO WICKMAN

ACCOUNTABILITY CHART™



RIGHT SEATS

Function

Name

- Role
- Role
- Role
- Role
- Role

RIGHT SEATS

Marketing/Sales

Name

- LMA™
- Marketing
- Hit sales numbers
- Sell
- Account management

RIGHT SEATS

- Gets It
- Wants It
- Capacity to Do It

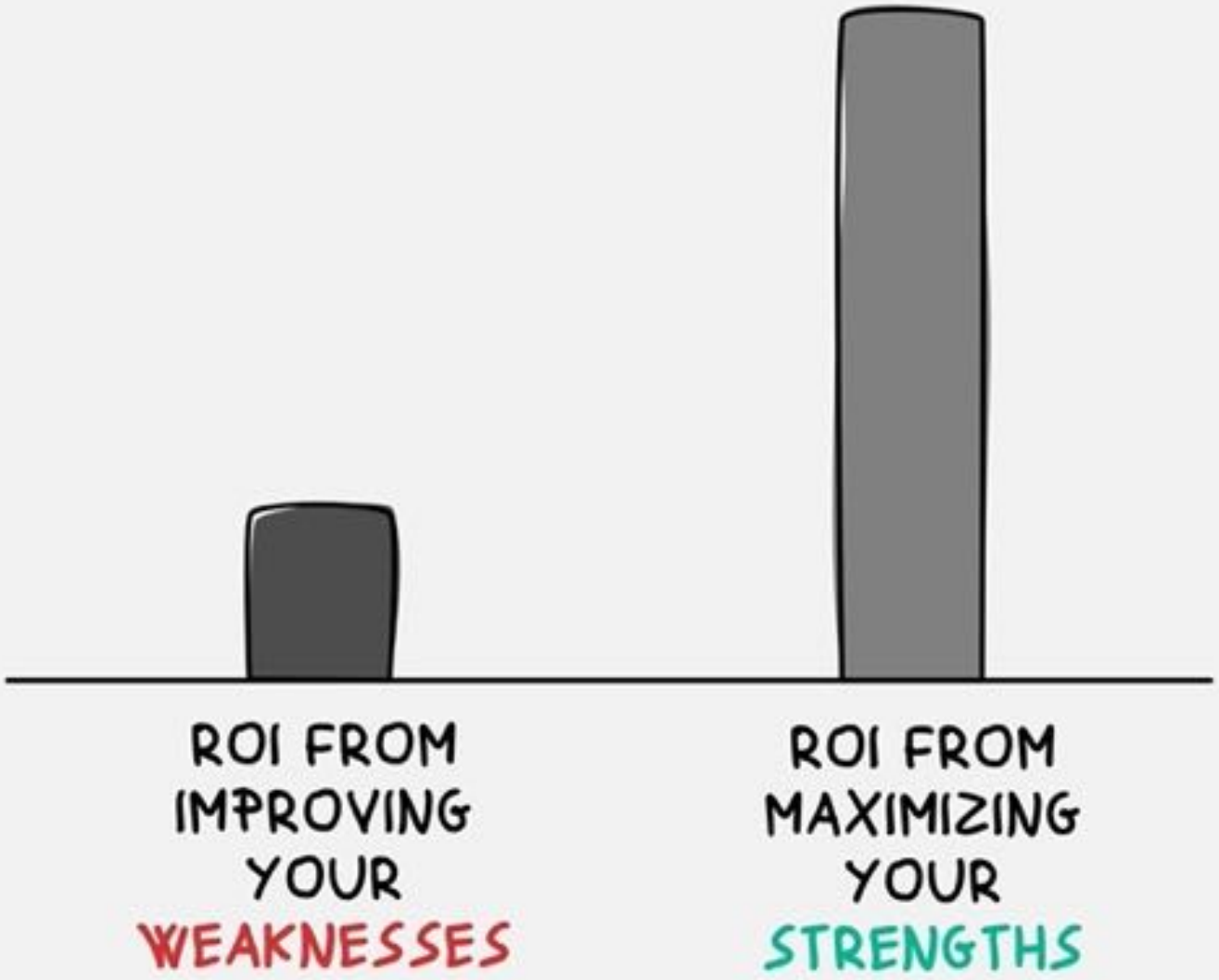
Center

Name

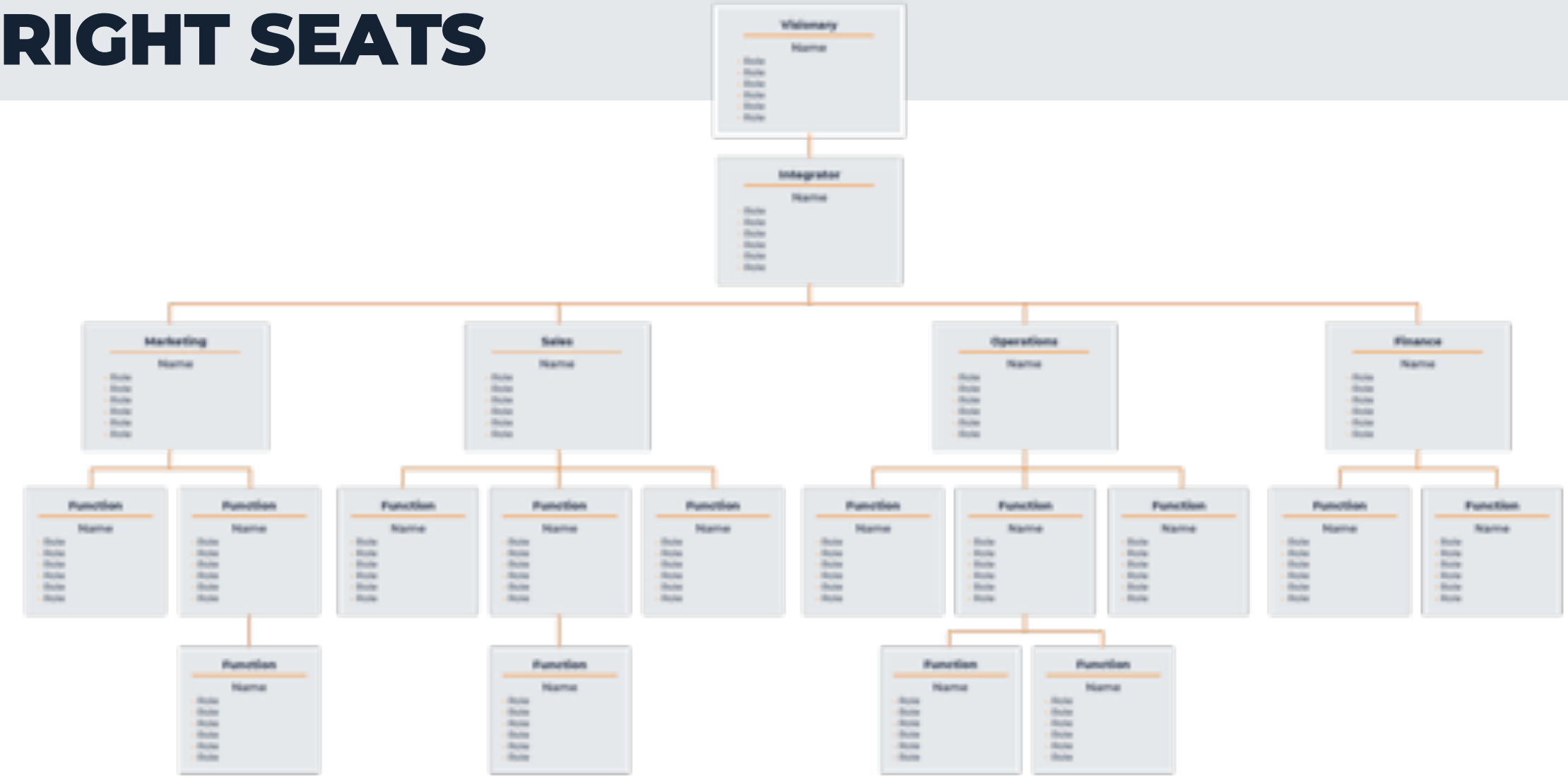
- Win face offs
- Create scoring chances
- Score goals
- Back check/defend
- Minimize turnovers

THE PEOPLE ANALYZER™

NAME	Humbly confident	Grow or die	Help first	Do the right thing	Do what you say	Get it	Want it	Capacity
Maria Rodriguez	+	+	+	+	+	Y	Y	Y
Jalen Taylor	–	+/–	–	–	+/–	Y	Y	N
Amina Muhammed	+/–	+/–	+	+/–	+	N	Y	Y
THE BAR	+	+/–	+	+/–	+	Y	Y	Y


ROI FROM IMPROVING YOUR WEAKNESSES
ROI FROM MAXIMIZING YOUR STRENGTHS

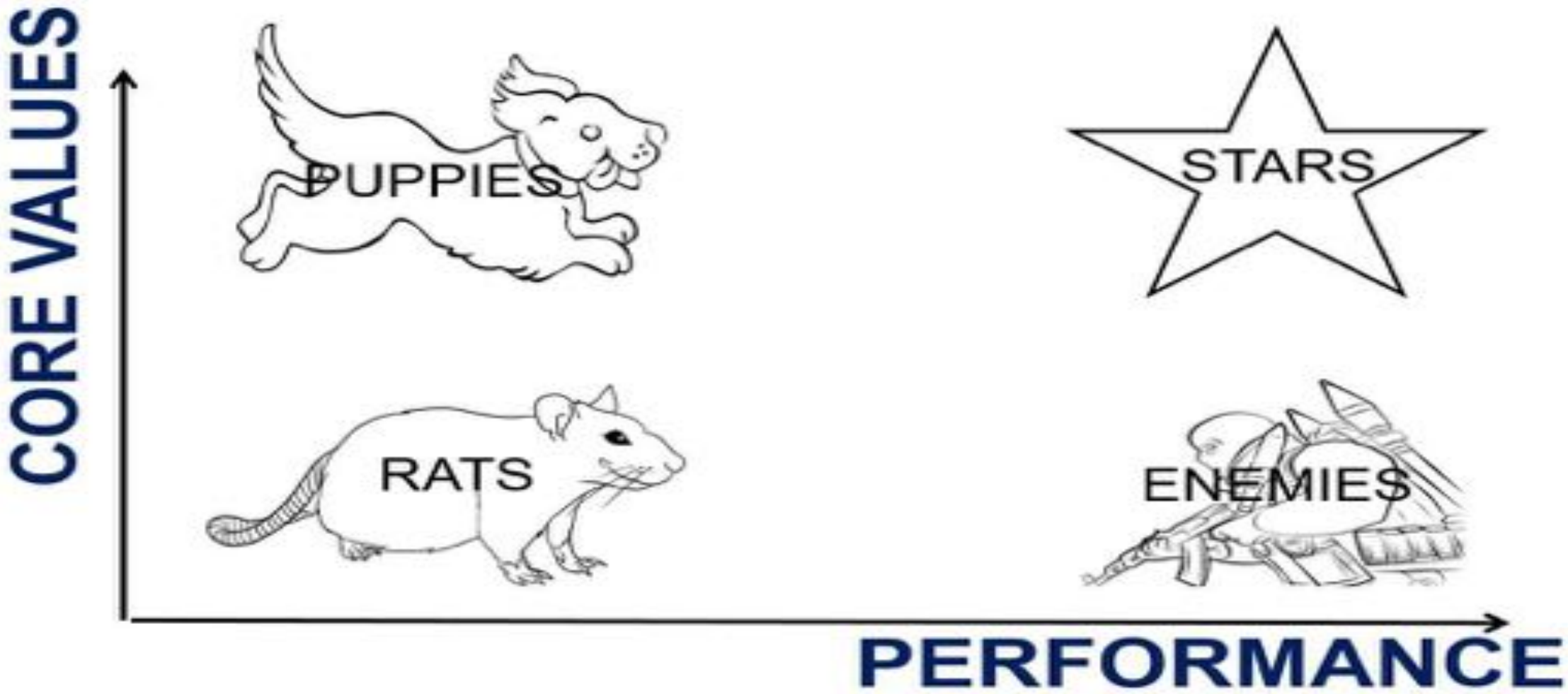
RIGHT SEATS


Visionary
Name
Integrator
Name
Marketing
Name
Sales
Name
Operations
Name
Finance
Name
Function
Name

THREE KINDS OF PEOPLE ISSUES

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

LEADERSHIP



LEADERSHIP

82% of bosses are “Accidental Managers”

And a ¼ of them are in Senior Leadership roles.

According to the Chartered Management Institute (CMI)

Employee Engagement

The role of managers in employee engagement

70%

70% of the variance in team engagement is determined solely by the manager.

3X

Employees who receive daily feedback from their manager are 3x more likely to be engaged.

85%

85% of employees worldwide are actively disengaged at work, despite more company effort.

79%

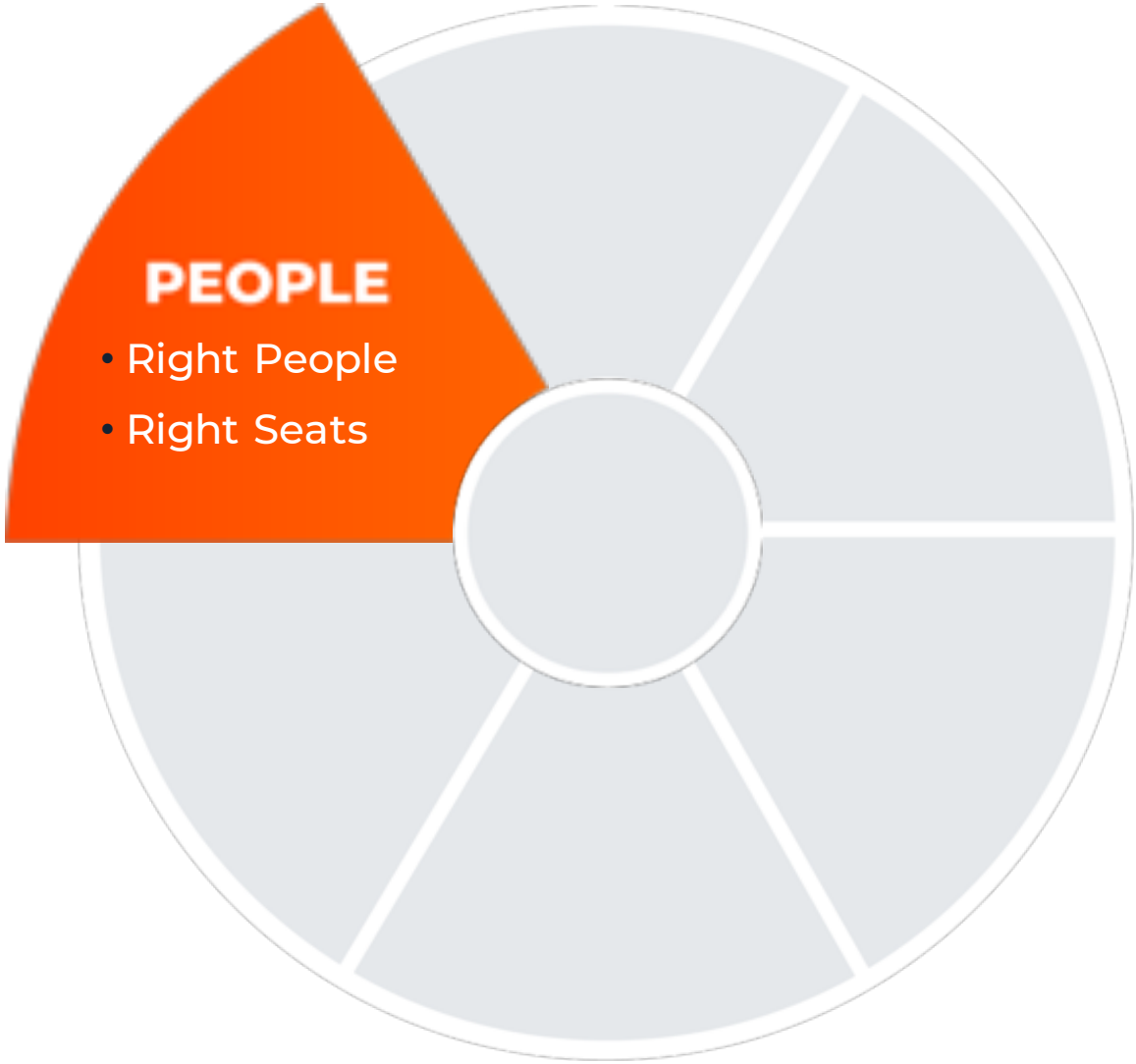
79% of employees who quit their jobs do so due to lack of appreciation from their managers.

REMEMBER ...

What You Tolerate Is What You Endorse

THE EOS MODEL

100% Strong



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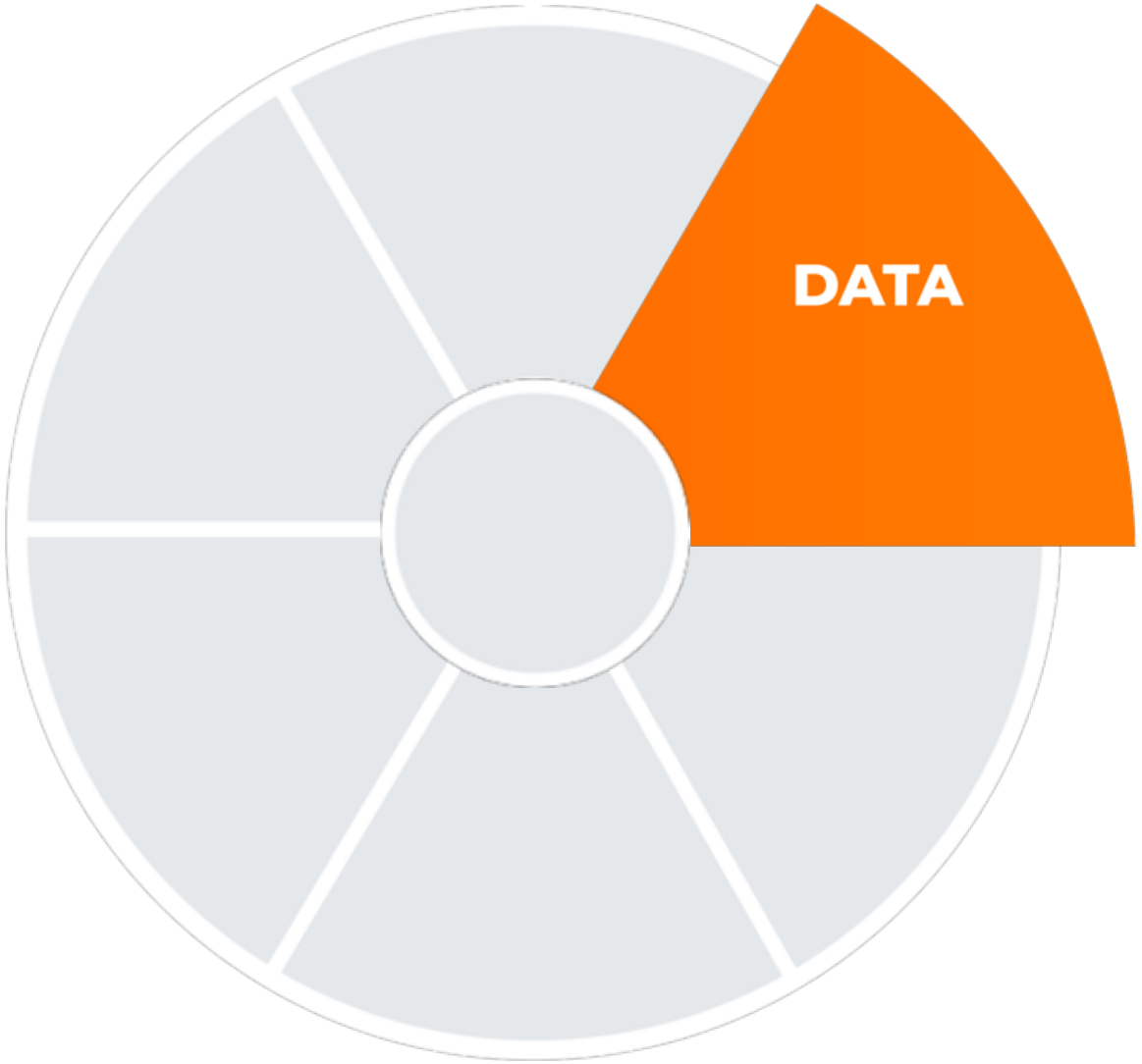
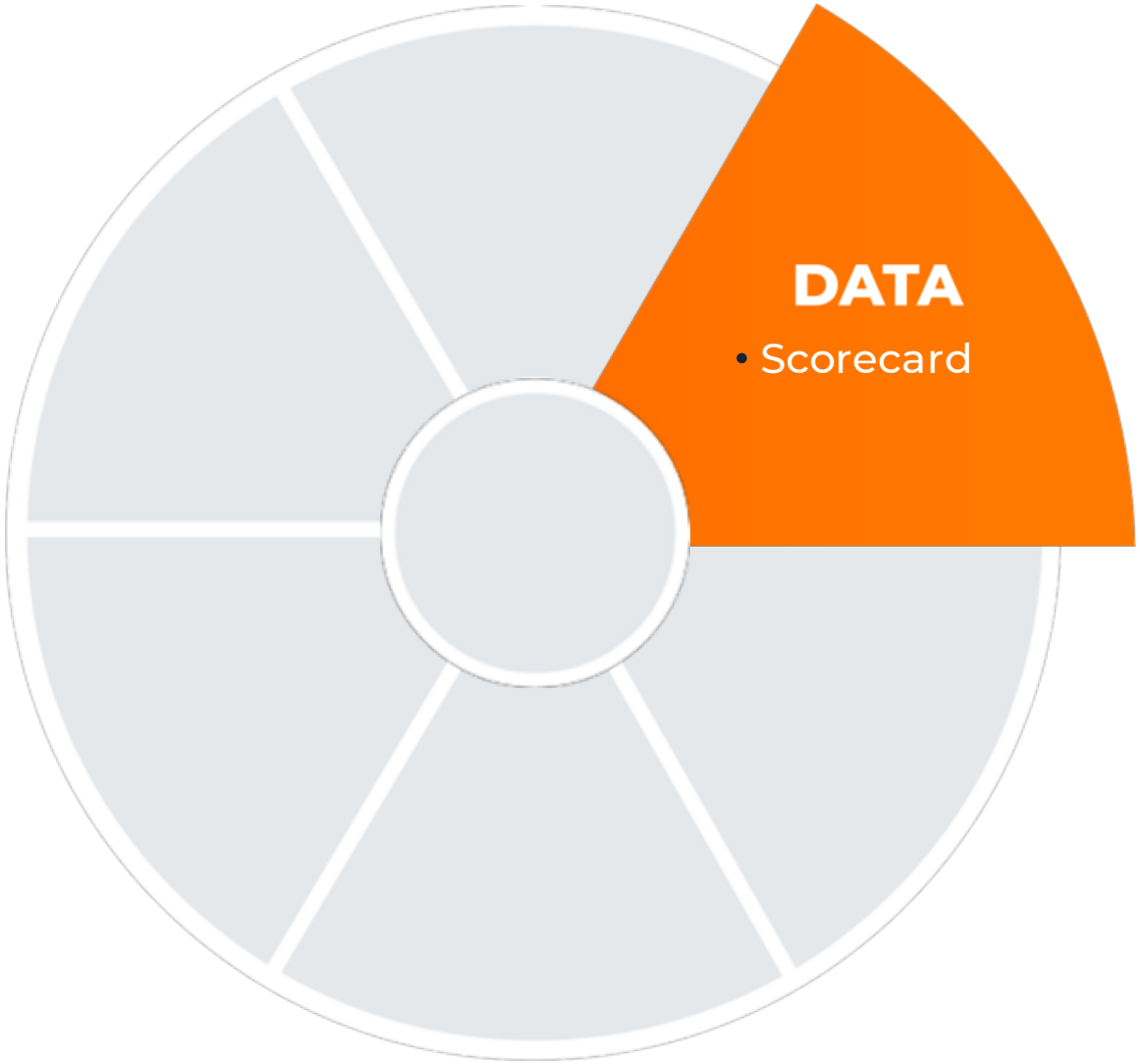


"If we have data, let's look at the data. If all we have are opinions, let's go with mine."

–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%

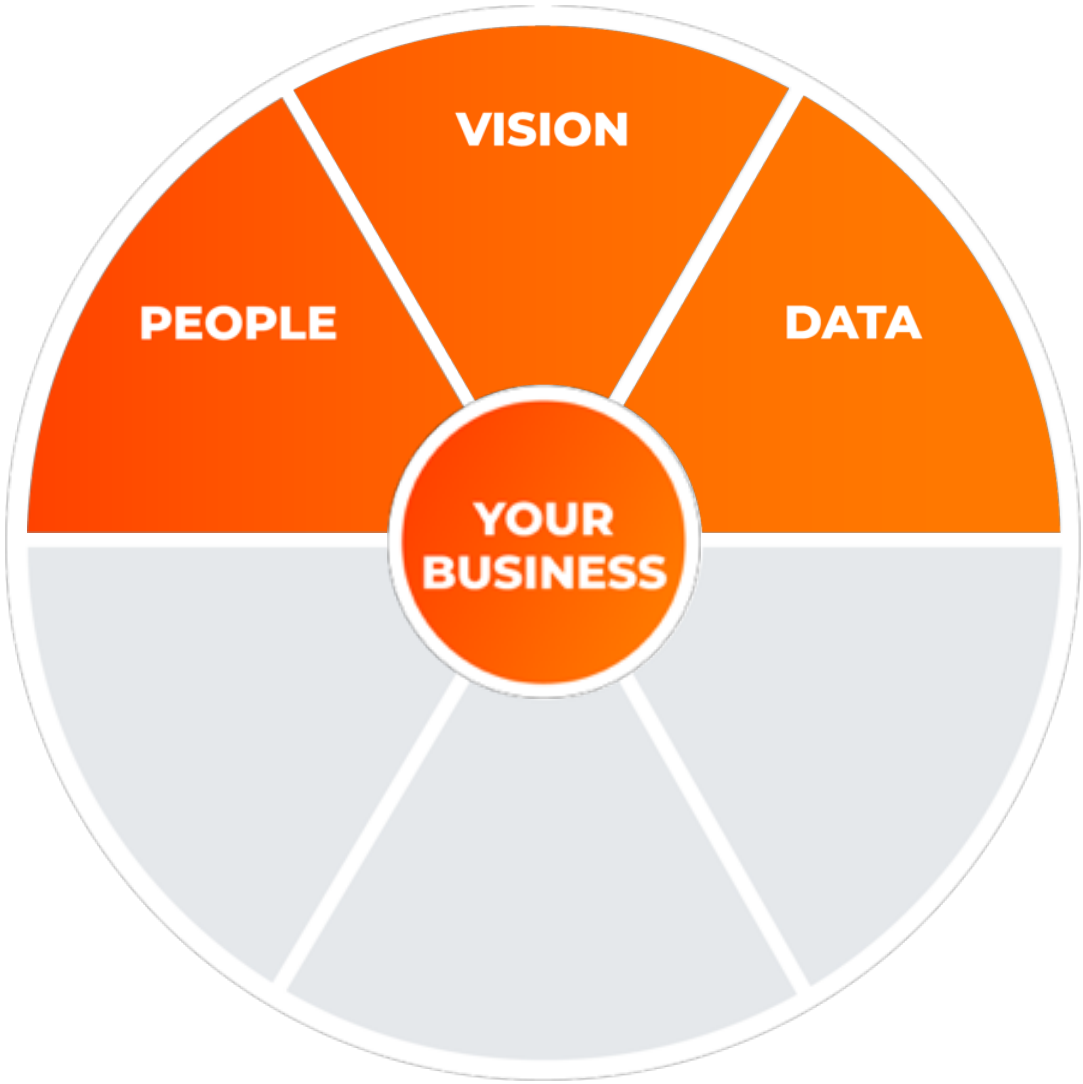
SCORECARD MEASURABLES

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

THE EOS MODEL

100% Strong

THE EOS MODEL



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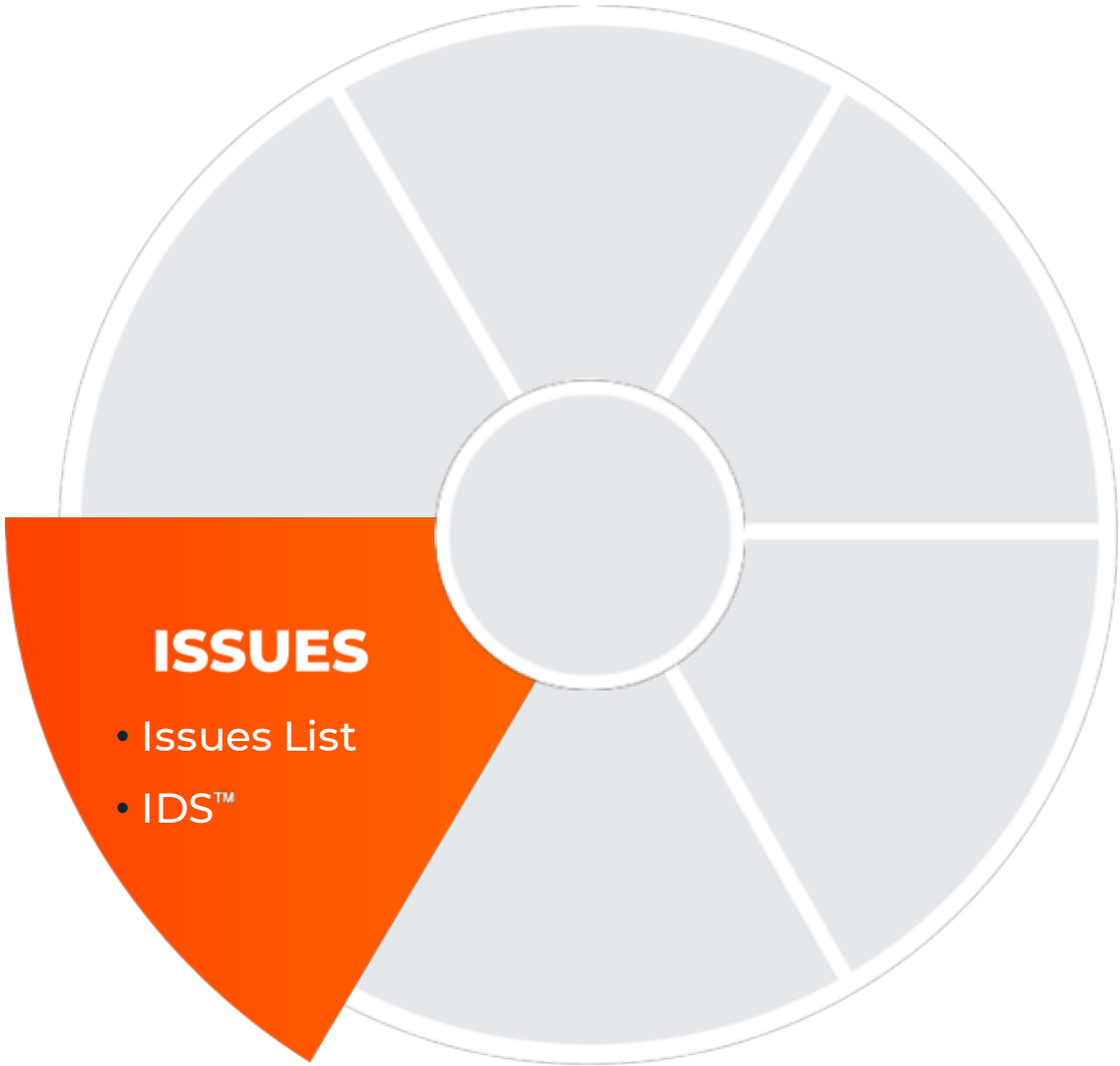

ISSUES SOLVING TRACK

- Identify
- Discuss
- Solve

THE EOS MODEL

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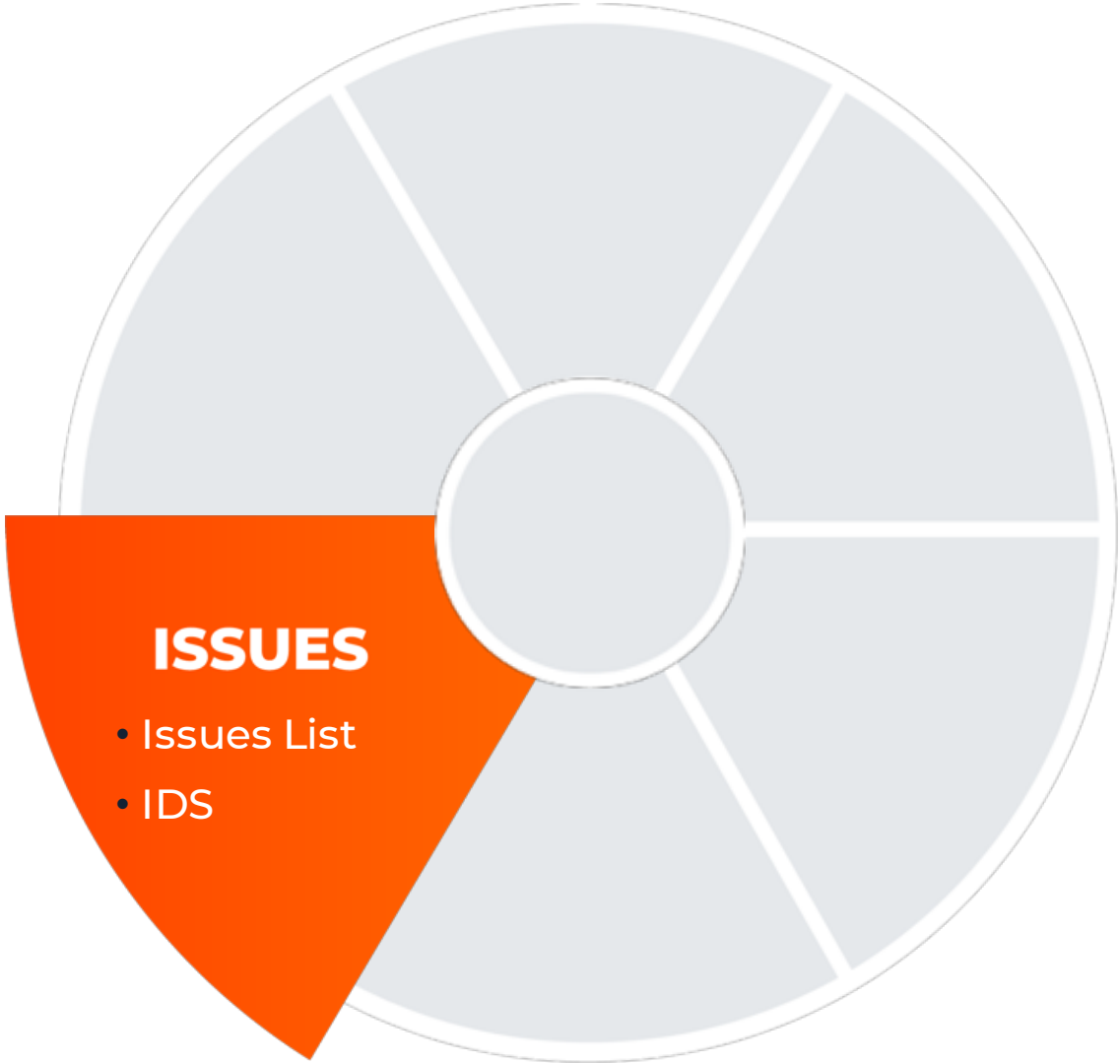

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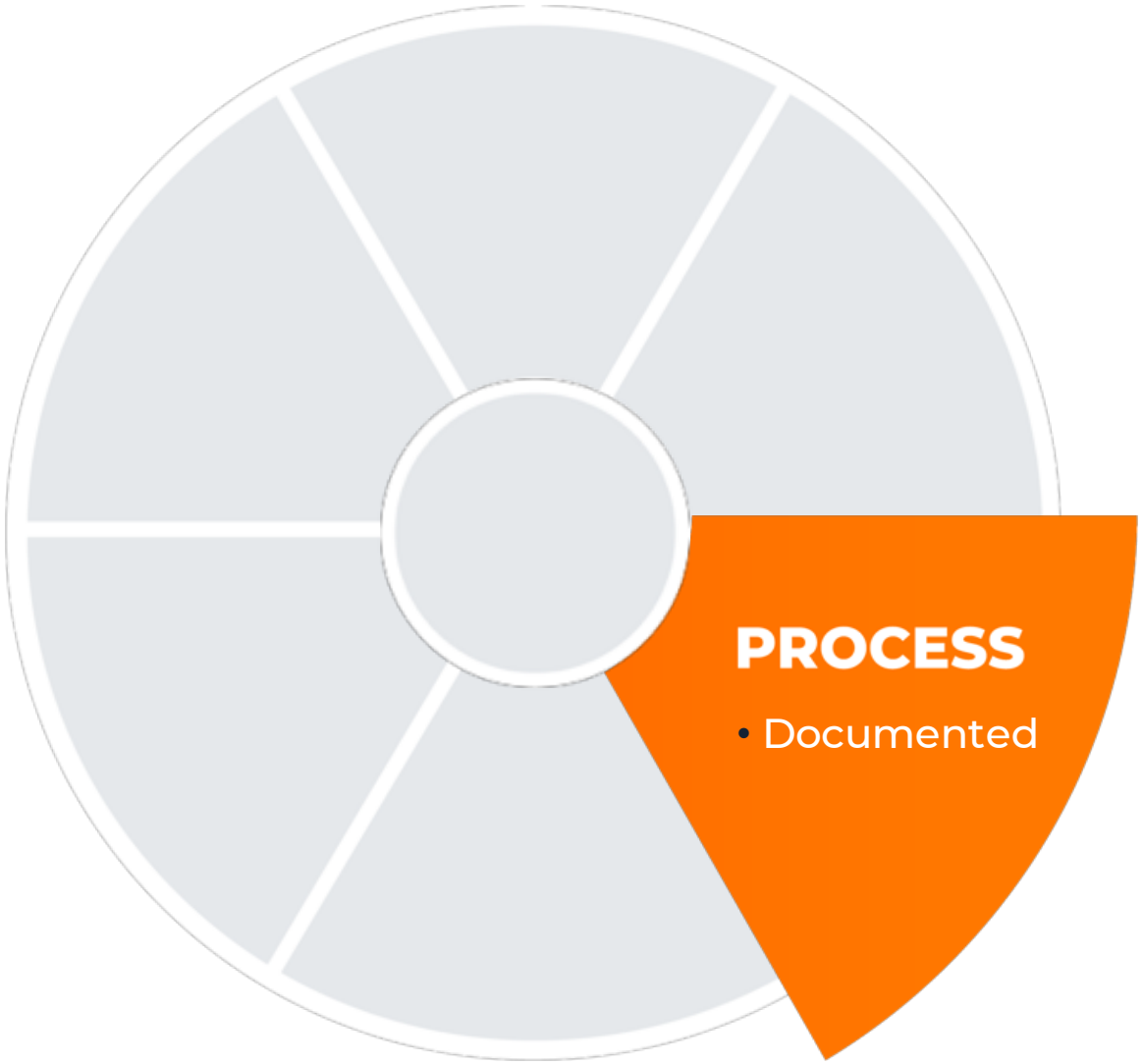


TODAY'S THOUGHT...

HOW TO PUT ON YOUR SOCKS

Inspired by John Wooden

Legendary College Basketball Coach

I think it's the little things that really count. The first thing I would show our players at our first meeting was how to take a little extra time putting on their shoes and socks properly:

- ✓ LONGER PLAY
- ✓ FEWER BLISTERS
- ✓ LESS PAIN

Eliminate wrinkles from toes and heel

Pull shoe wide open and put on over held up sock

Snugly tighten laces around each eyelet

Tie it

Double-tie it

INN ON THE TWENTY

Coronavirus Disease 2019 (COVID-19)

How to wash your hands

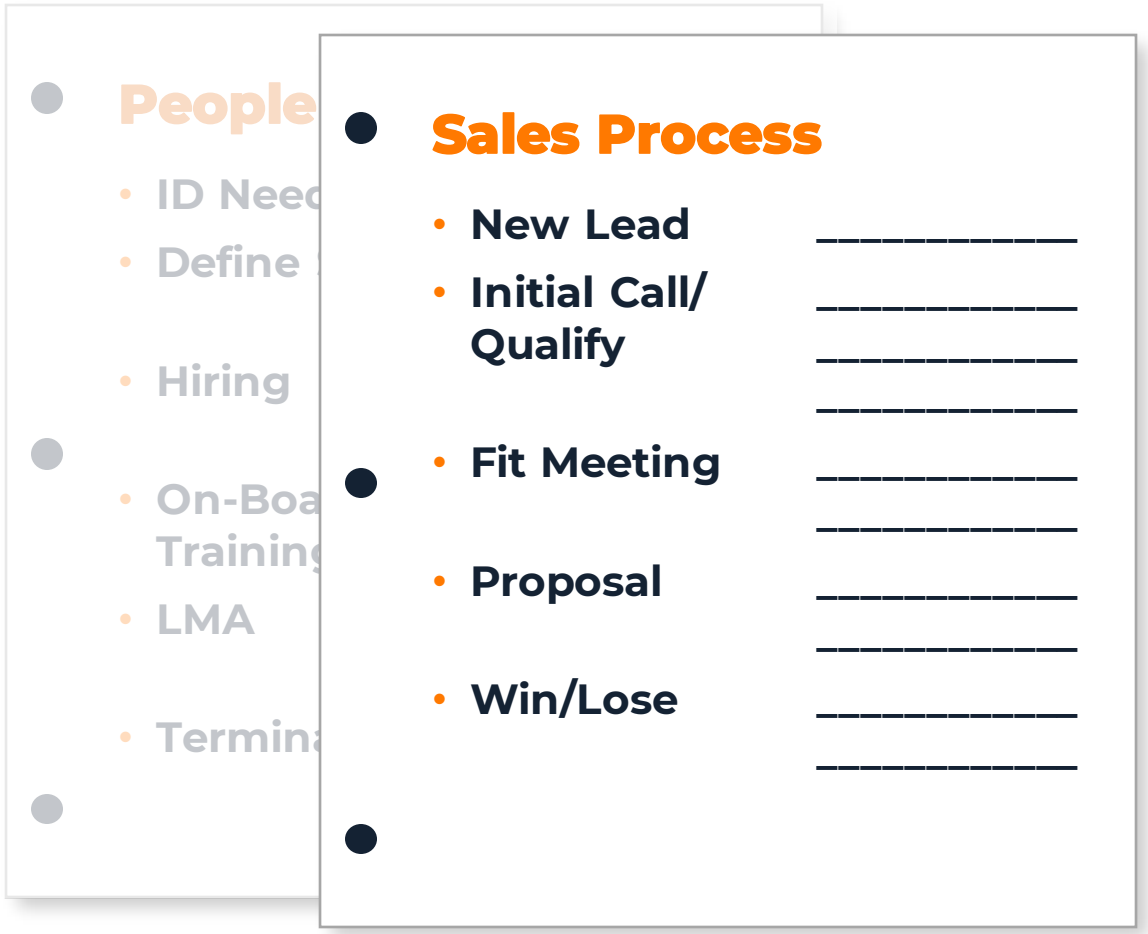
Public Health Ontario | Santé publique Ontario

HANDFUL OF CORE PROCESSES

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

DOCUMENT AND SIMPLIFY

DOCUMENT AND SIMPLIFY



“YOUR COMPANY WAY”

Table of Contents

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

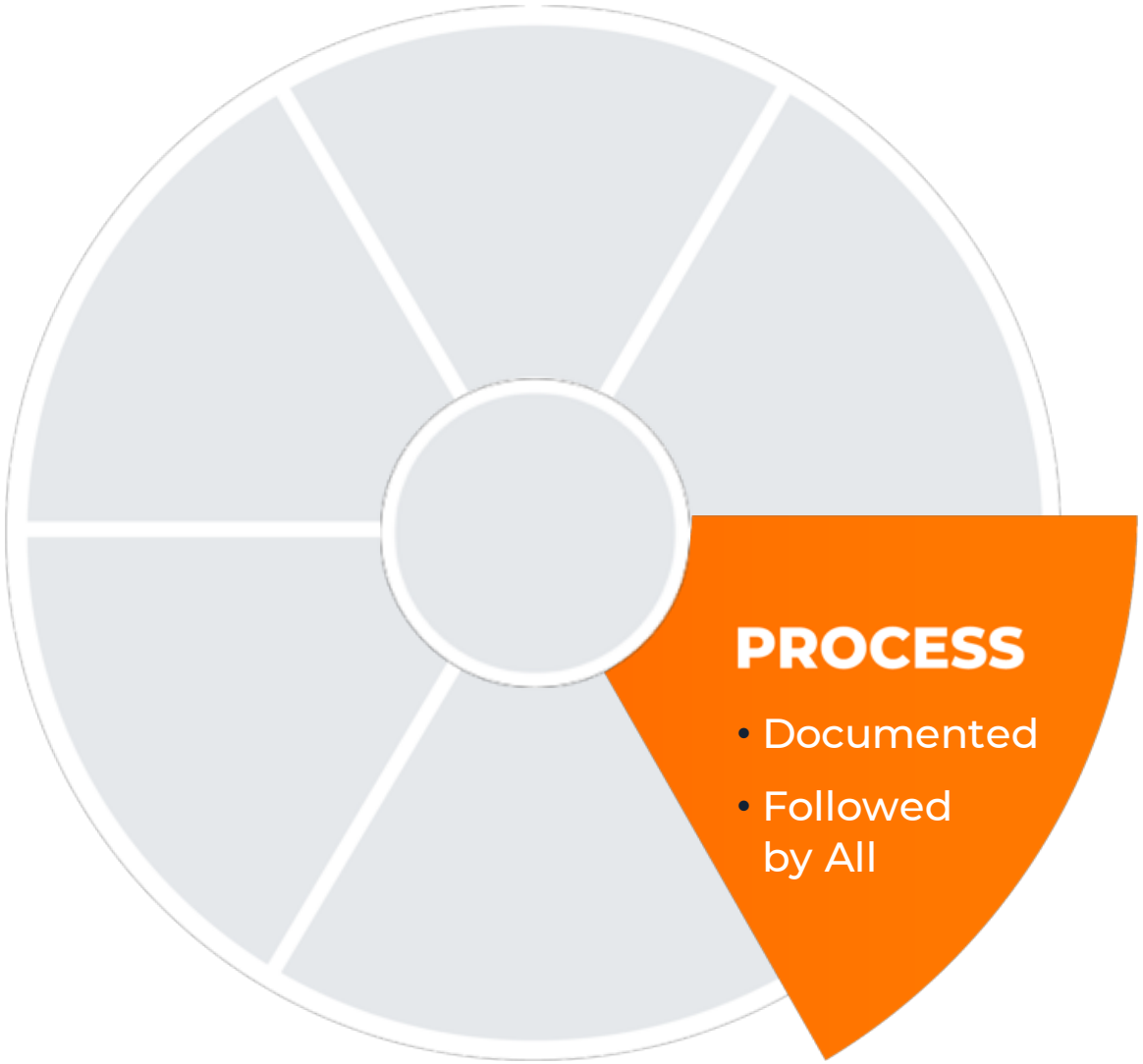
People Process

- ID Need _____
- Define Seat _____
- Hiring _____
- On-Boarding/ Training _____
- LMA _____
- Termination _____

“Systemize the predictable
so you can humanize
the exceptional.”

– **ISADORE SHARP,** *founder of Four Seasons Hotels*

THE EOS MODEL

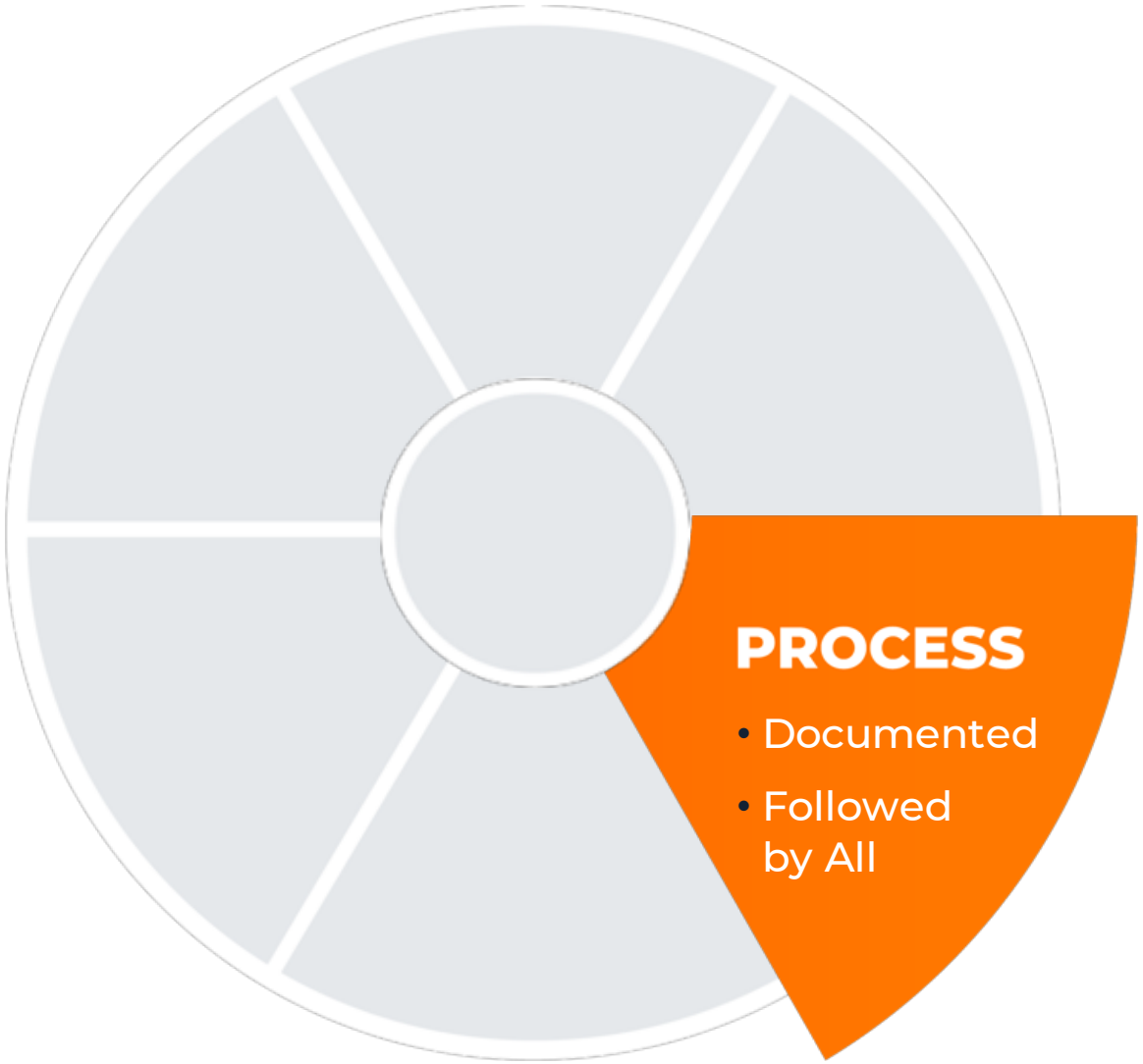


FBA CHECKLIST

- [x] Train
- [x] Measure
- [x] LMA
- [x] Update

THE EOS MODEL

100% Strong



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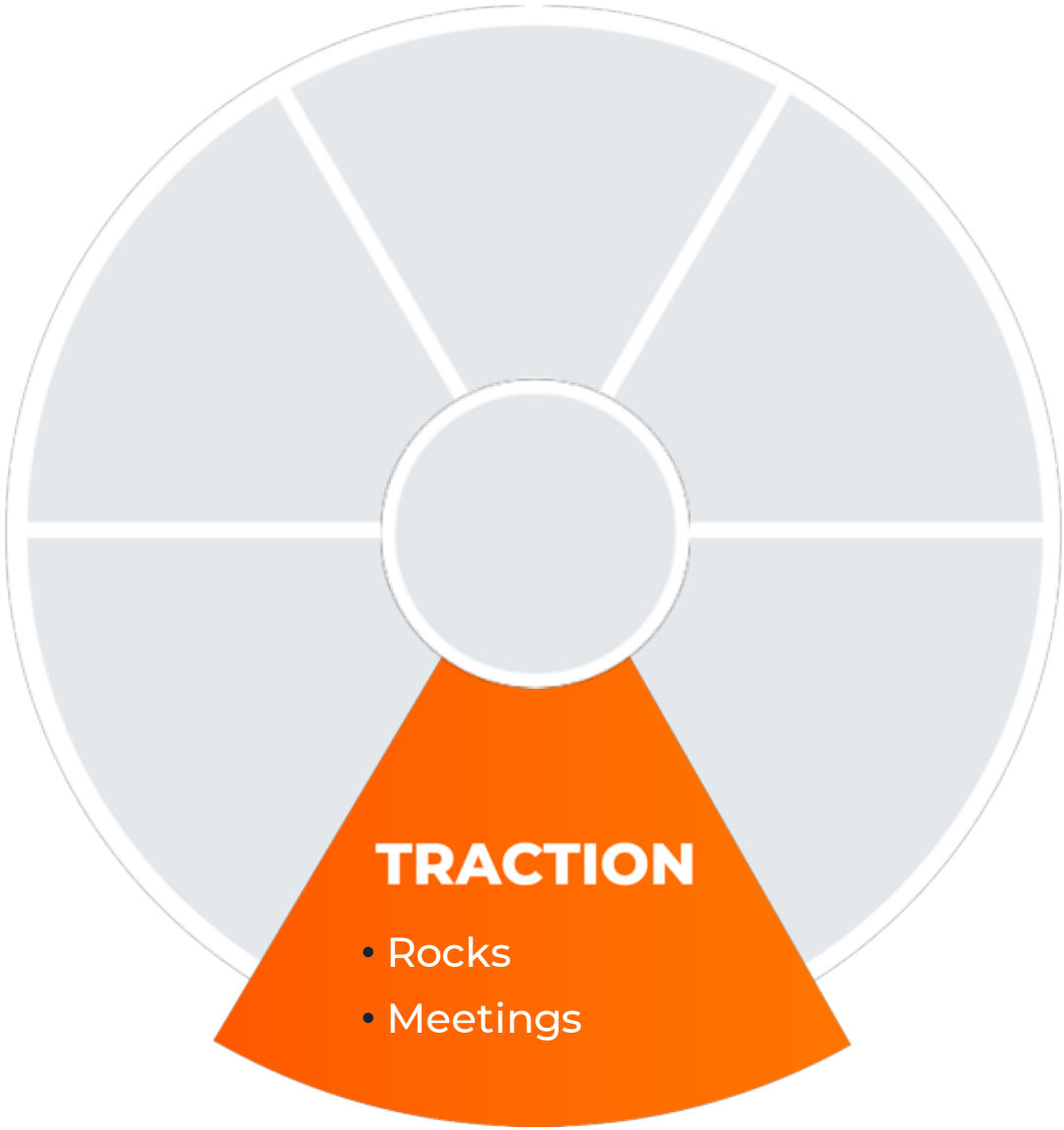
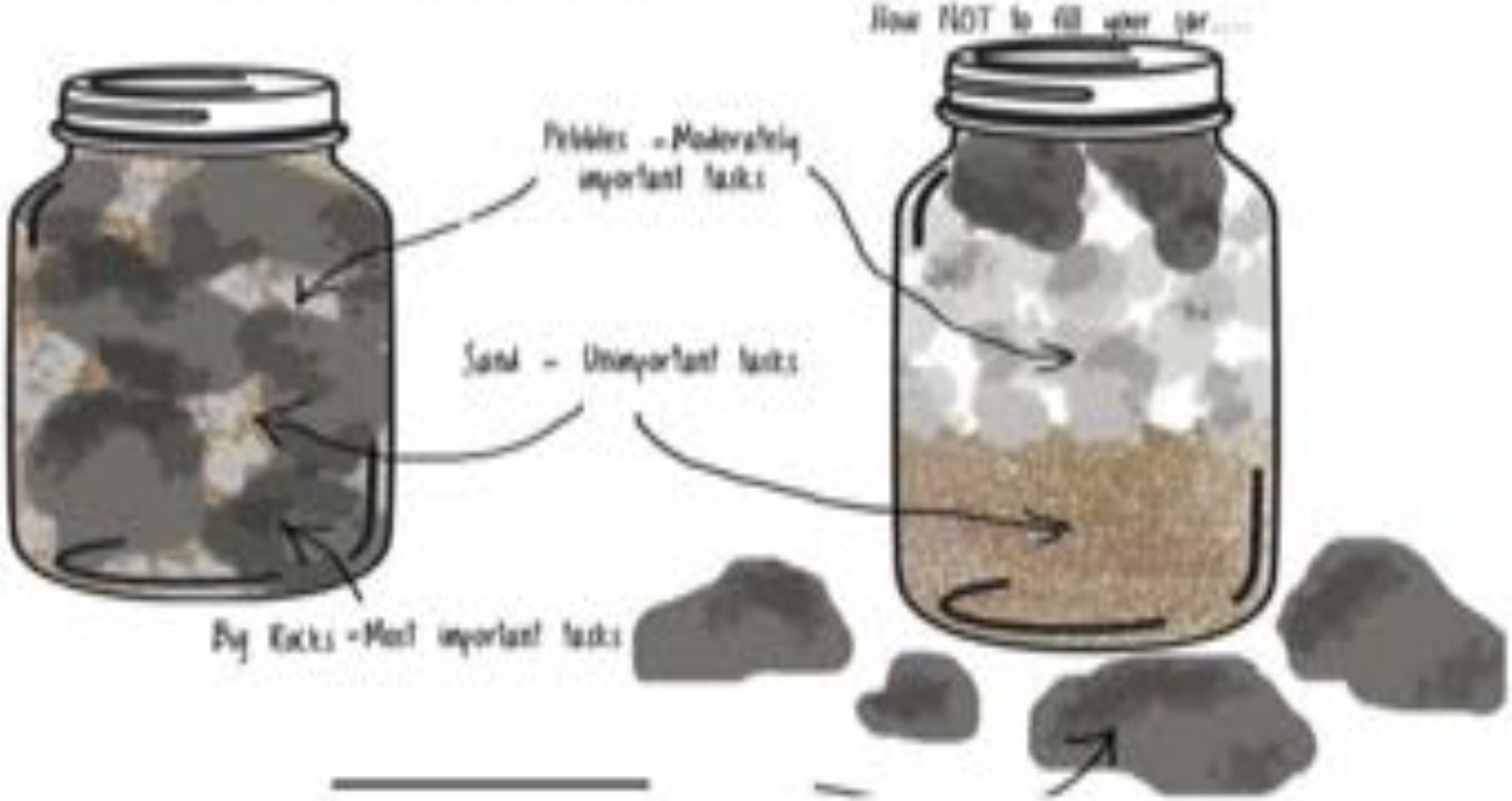


Stephen Covey's 'Big Rocks' Productivity Jar



IS MY ROCK S.M.A.R.T

- Specific — Keep them short and to the point, with no room for confusion.
- Measurable — If you can explain what it means when something is ‘done,’ it’s measurable. What does Done/Success look like?
- Attainable — Ambitious but achievable.
- Realistic — Don’t overestimate/underestimate your skill, time, or resources.
- Time-bound — Ensure it has a deadline. With Rocks, it’s always 90 days. Add milestones (3-4)

MEETING PULSE™

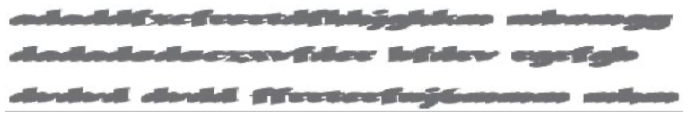
- **90-Day World™**
- **Meeting Pulse**
  - Same Day
  - Same Time
  - Start on Time
  - End on Time
  - Same Agenda

LEVEL 10 MEETING™

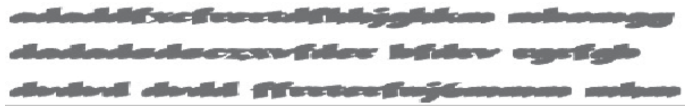
- **Good News** 5 Minutes
- **Scorecard** 5 Minutes
- **Rock Review** 5 Minutes
- **Customer & Employee Headlines** 5 Minutes

Reporting Only

- **To Do List** 5 Minutes



- **Issues List/IDS** 60 Minutes



- **Conclude** 5 Minutes

CONVERSATION PATTERNS

PERSON 1
PERSON 2
PERSON 3
PERSON 4
PERSON 5
PERSON 6

EFFECTIVE TEAM

INEFFECTIVE TEAM

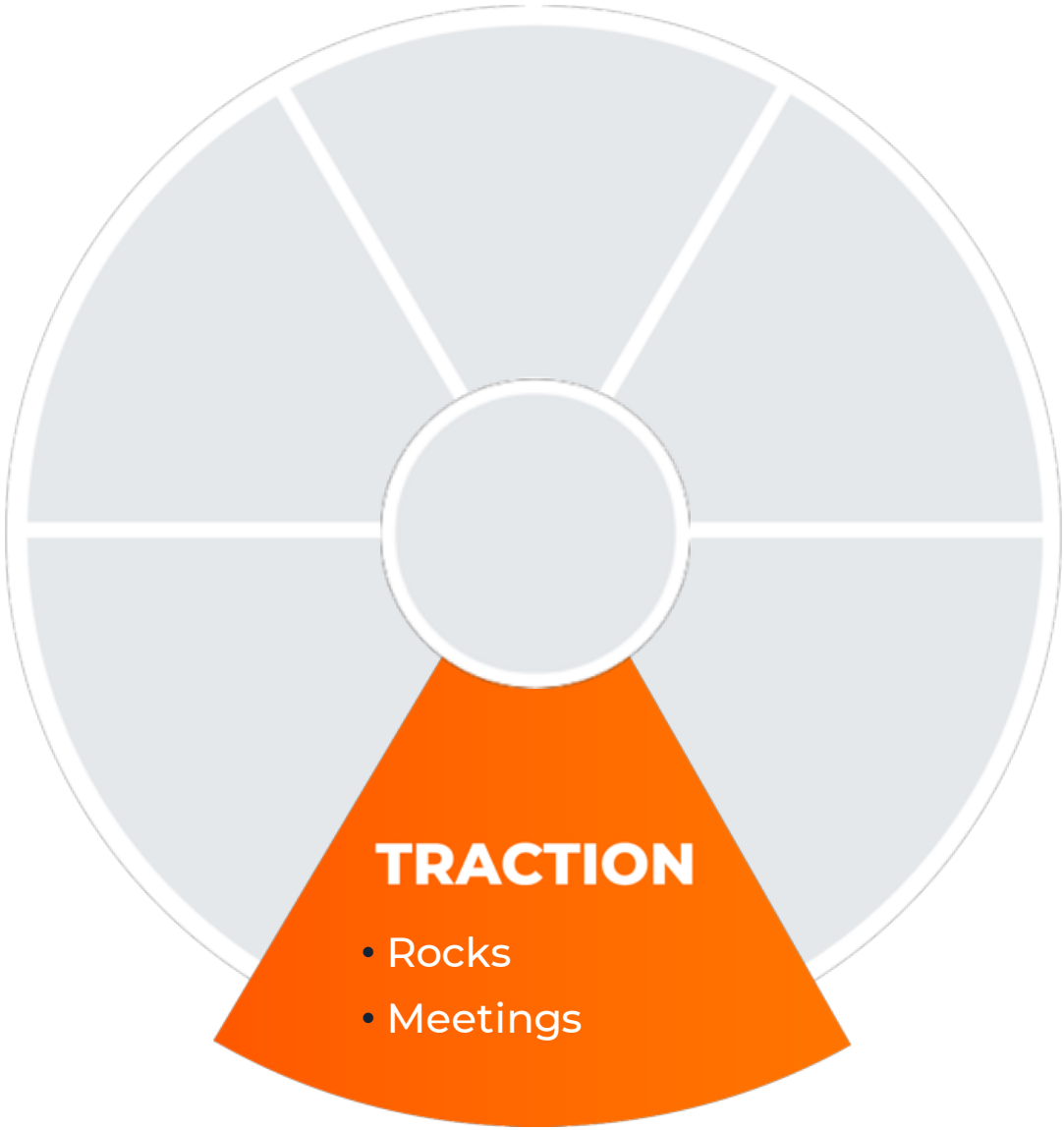
LIZ FOSSLIEN

TRIAGE YOUR ISSUES

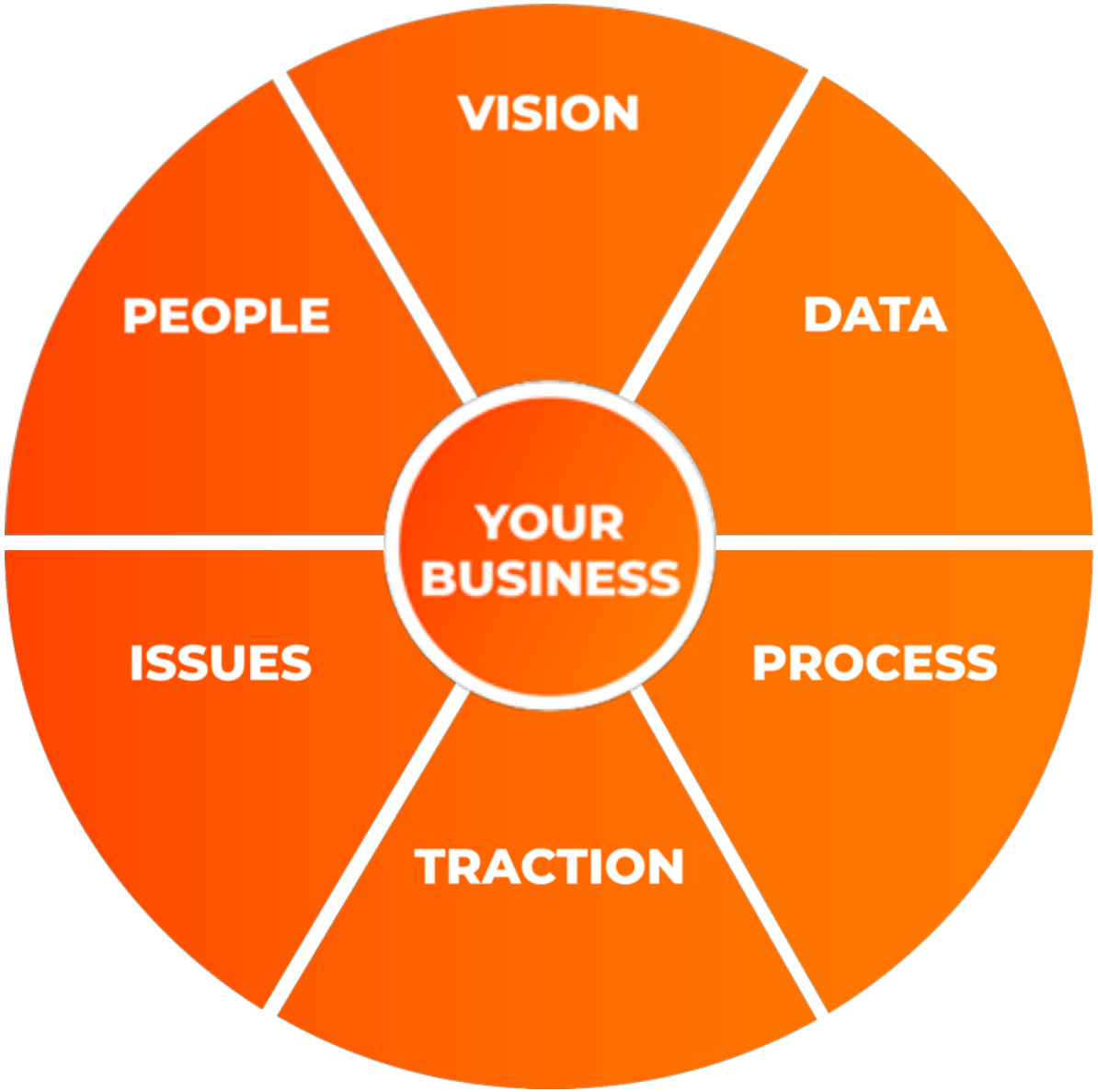
- SIMPLE:
  - Anyone can solve. Department. Punt (SLT should never need to get involved with these. Waste of time.).
- COMPLICATED
  - Department Head, Project Manager, Subject Matter Expert
- COMPLEX
  - SLT, Big stuff that the team needs to discuss. SLT L10 Issues

THE EOS MODEL

100% Strong

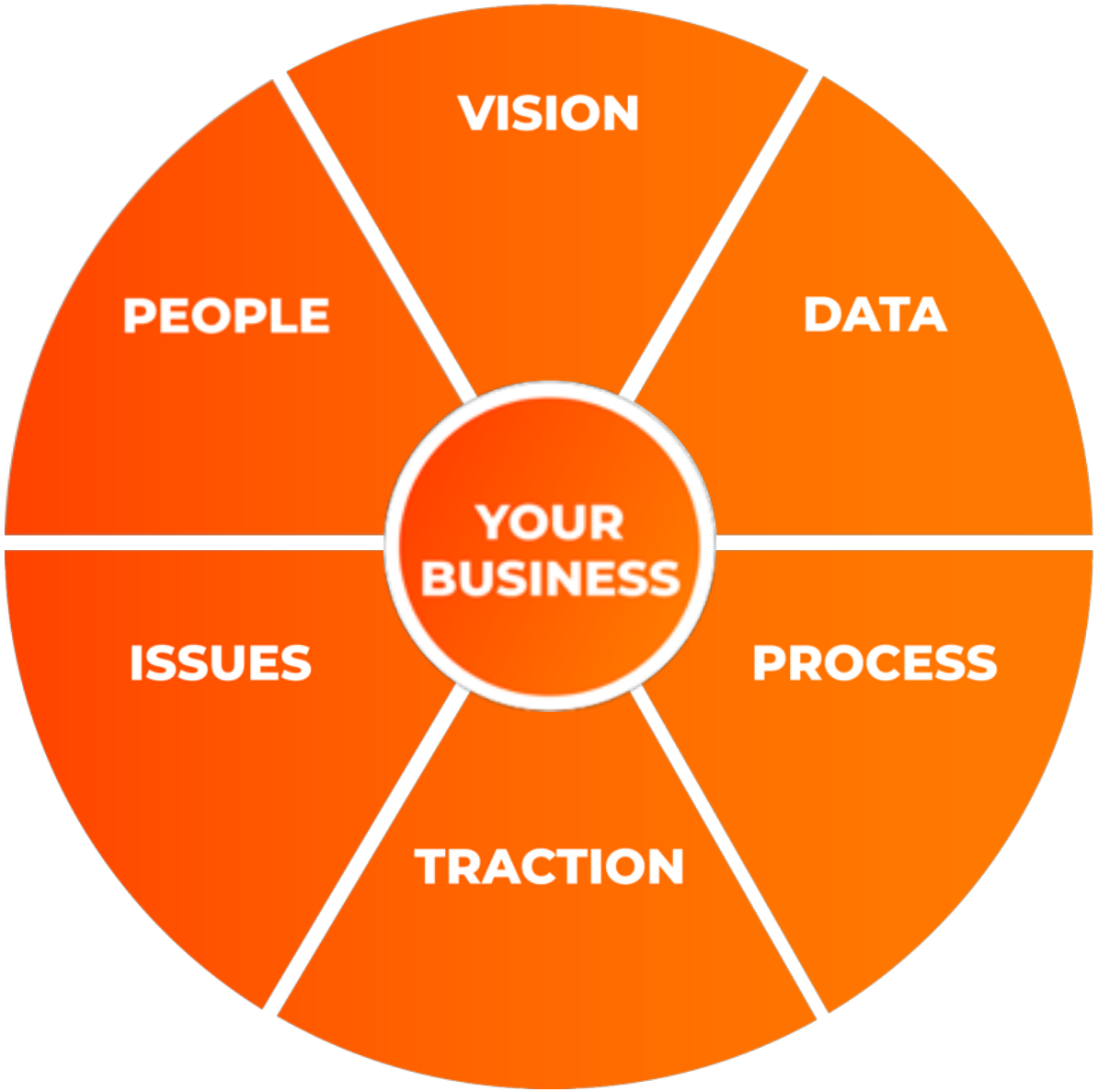


THE EOS MODEL



GET
RESULTS

THE EOS MODEL



EOS FOUNDATIONAL TOOLS™

- V/TO
- Accountability Chart
- Rocks
- Meeting Pulse
- Scorecard

BREAKOUT

1. In groups of 3, break out and IDS your One Issue. Using the IDS tool.
   - Identify your Key Issue
   - Discuss
   - Solve

Kidlan's Law

"If you could write the problem down clearly, then the problem is half solved".

WHAT WAS YOUR ‘AHA’ MOMENT…?

RESOURCES

- **EOSWorldwide.com**
  - Traction Library
    - Traction
    - Get a Grip
    - How to be a Great Boss
    - Process
  - Downloadable tools and videos
  - 90-Minute EOS Workshop with an EOS Implementer
  - Call me- Help First ☺ (Call to action)

FINAL THOUGHT...

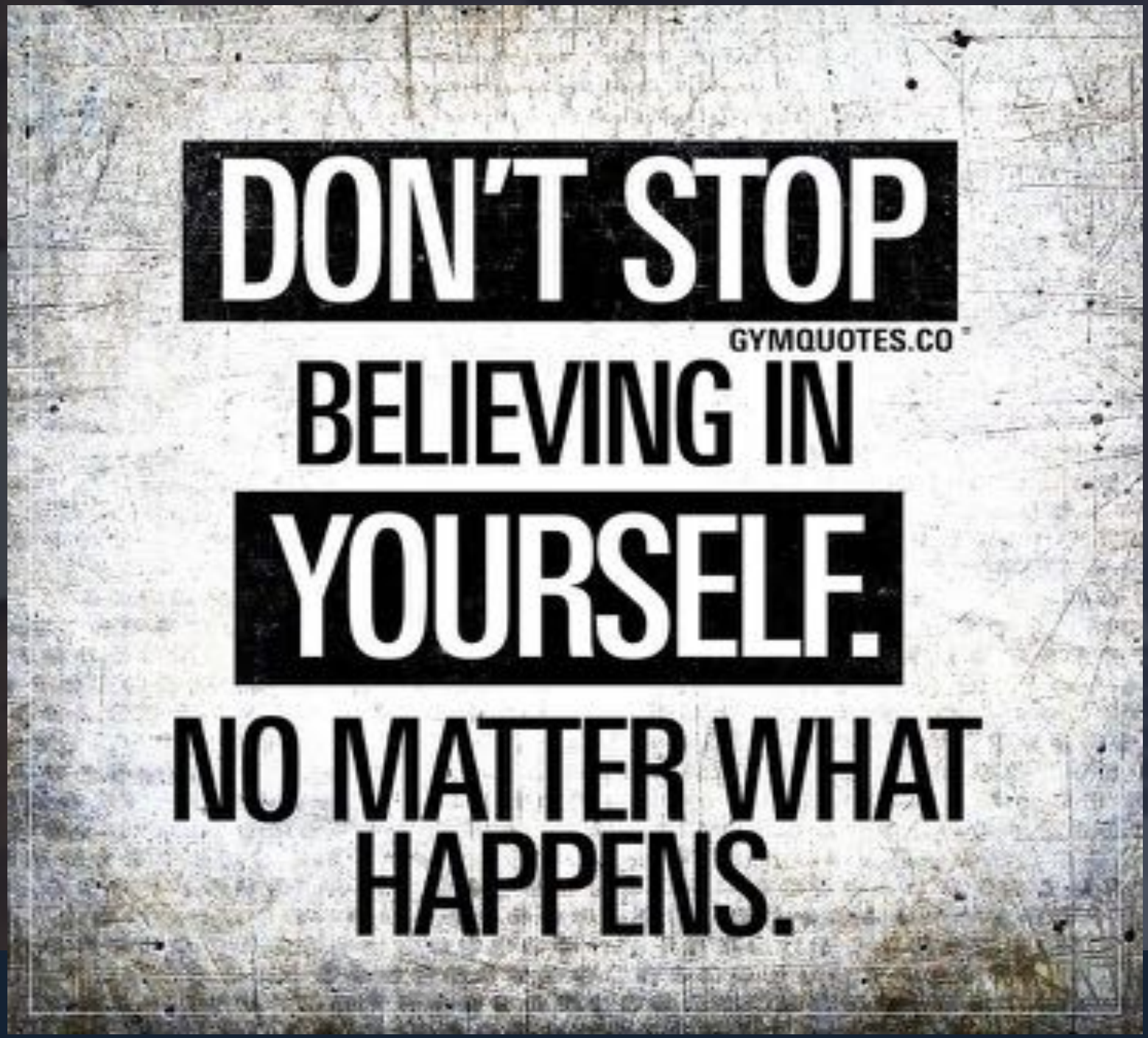
The system you are currently running has been perfectly designed to give you the results you are getting.

If you want better results, then you'll need to get a better system.

Maybe its time for EOS ☺

Al Moscardelli, Expert EOS Implementer

416-569-0570


DON'T STOP
GYMQUOTES.CO
BELIEVING IN
YOURSELF.
NO MATTER WHAT
HAPPENS.

ENTREPRENEURIAL
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ON YOUR BUSINESS

Best Practices | Deep Dive

Six Keys to Getting What You Want
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