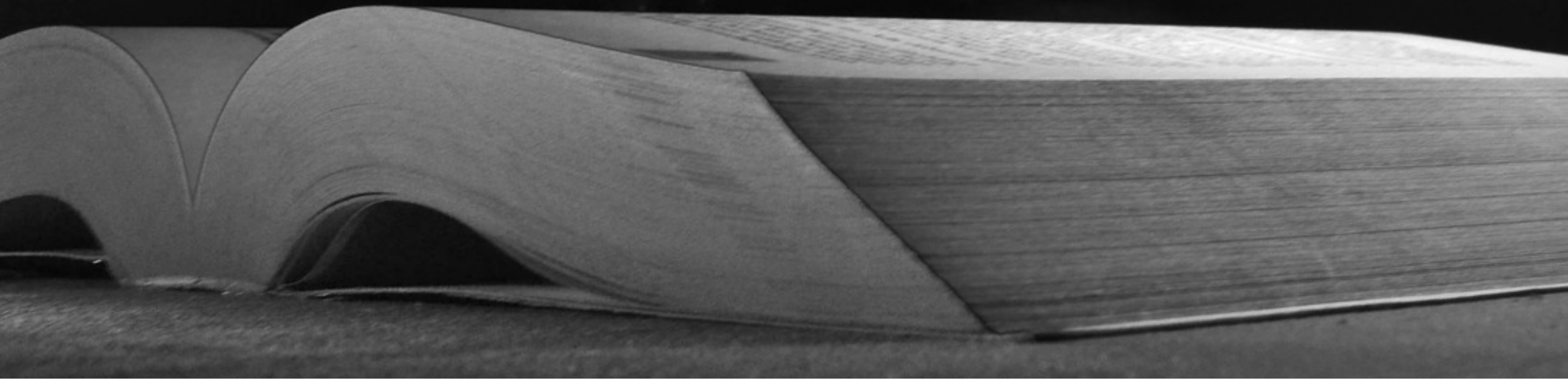


Get Your Agency's S**t Together

Marisa Smith, Head Brainiac
The Whole Brain Group
[@wholebrainprez](#)

Once Upon a Time....

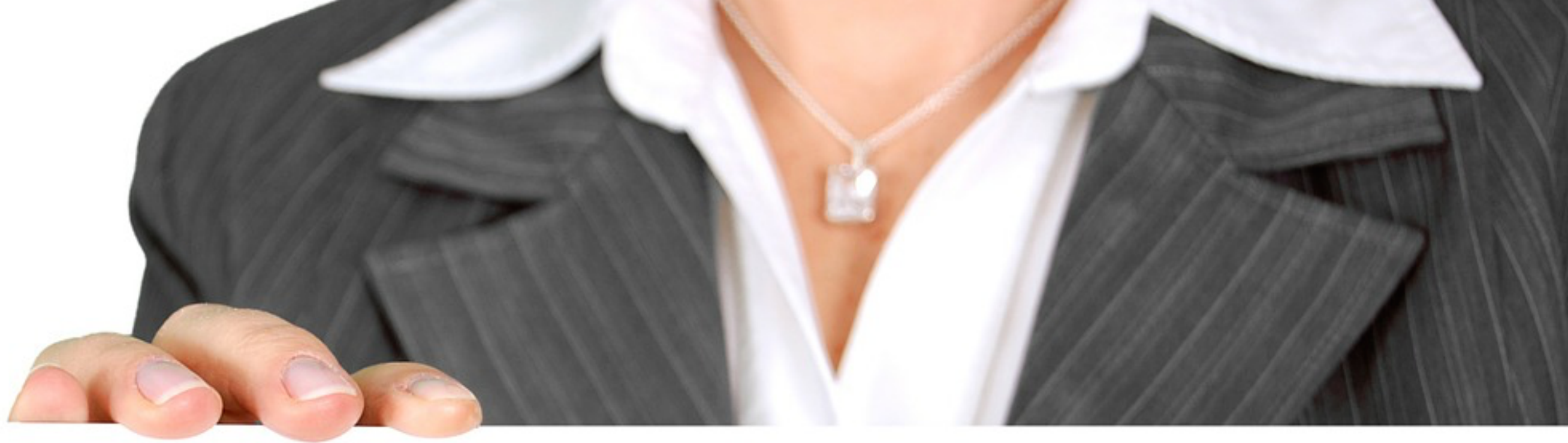












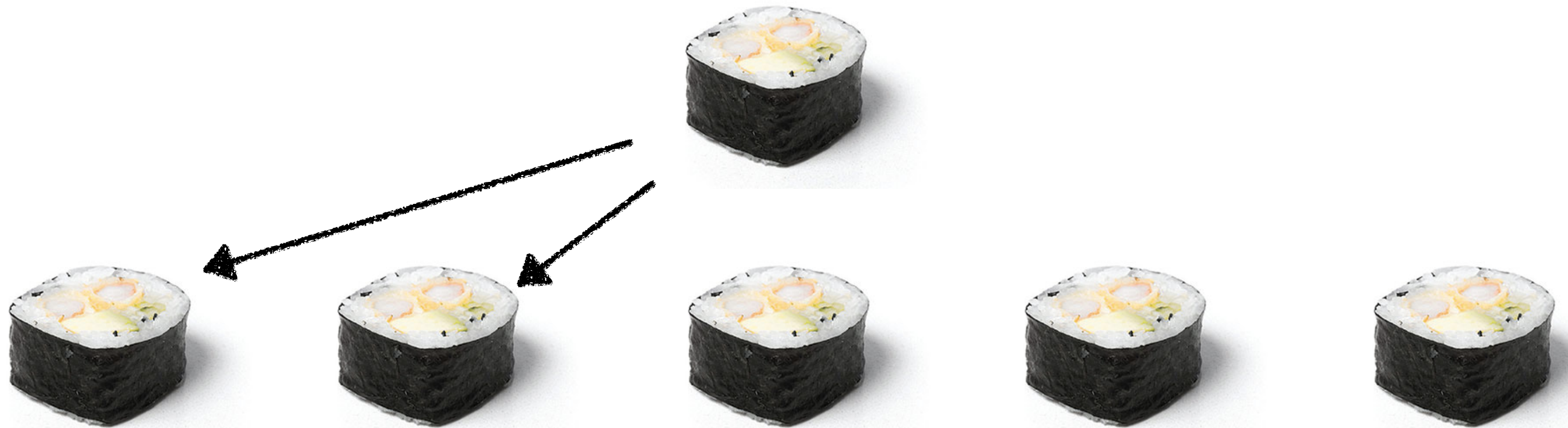
I AM YOUR BOSS!

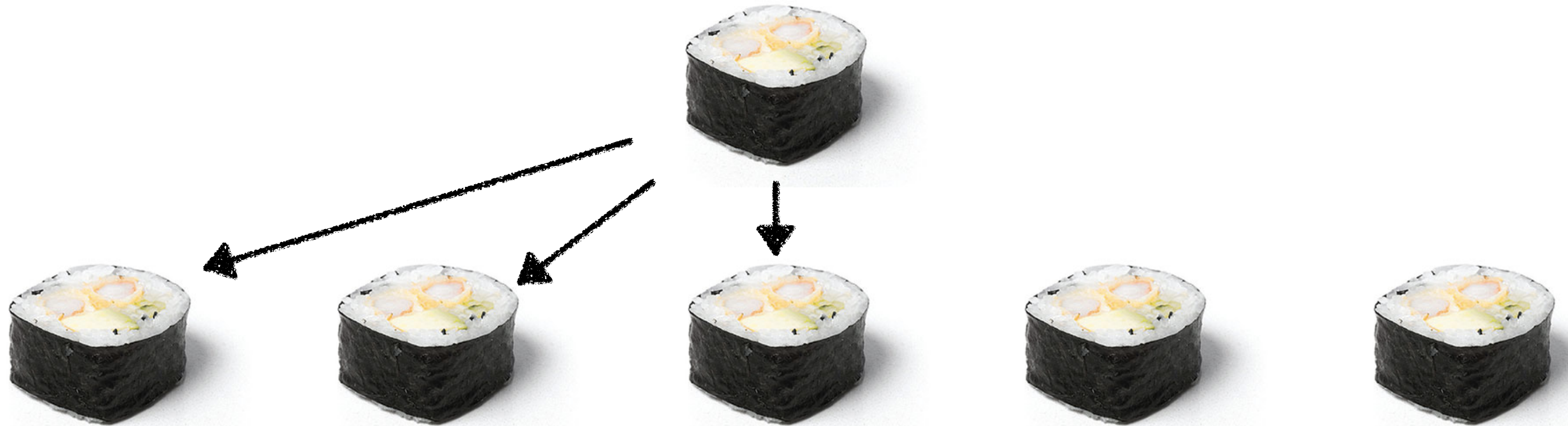


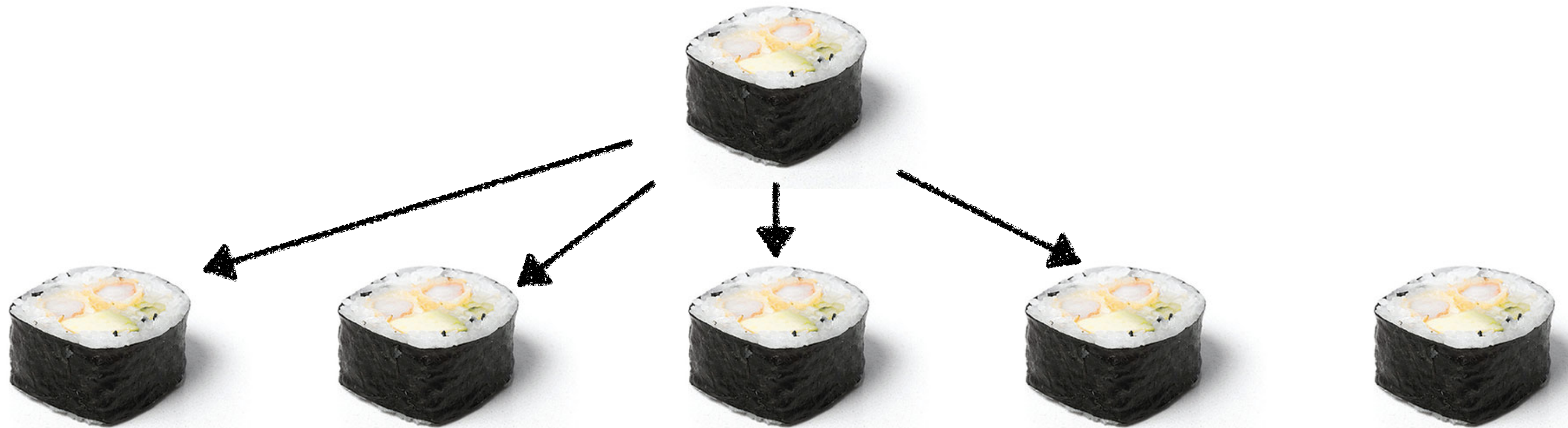


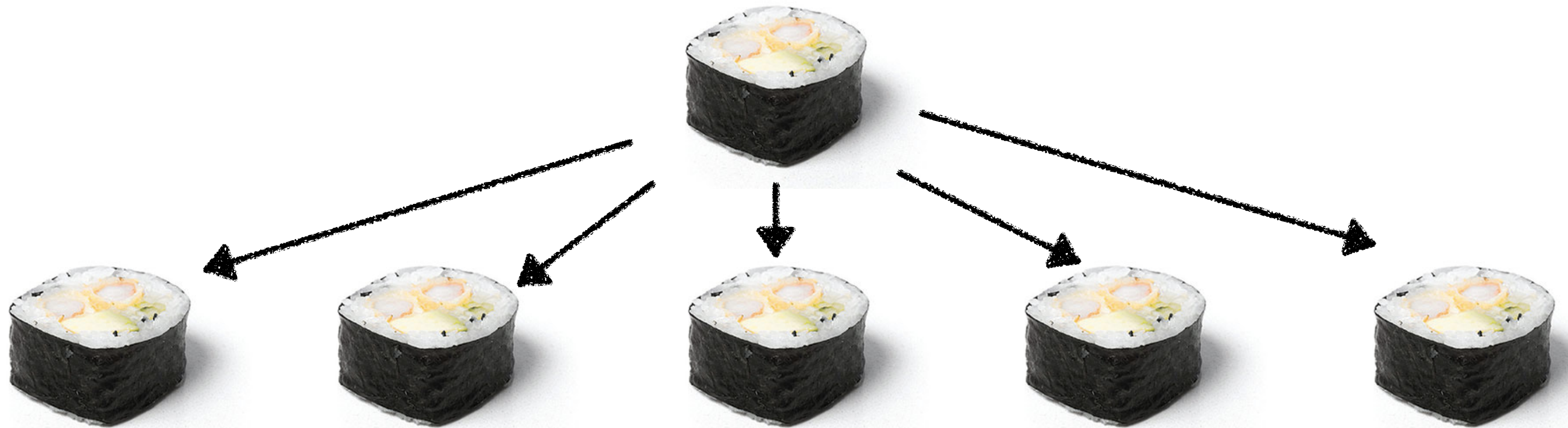


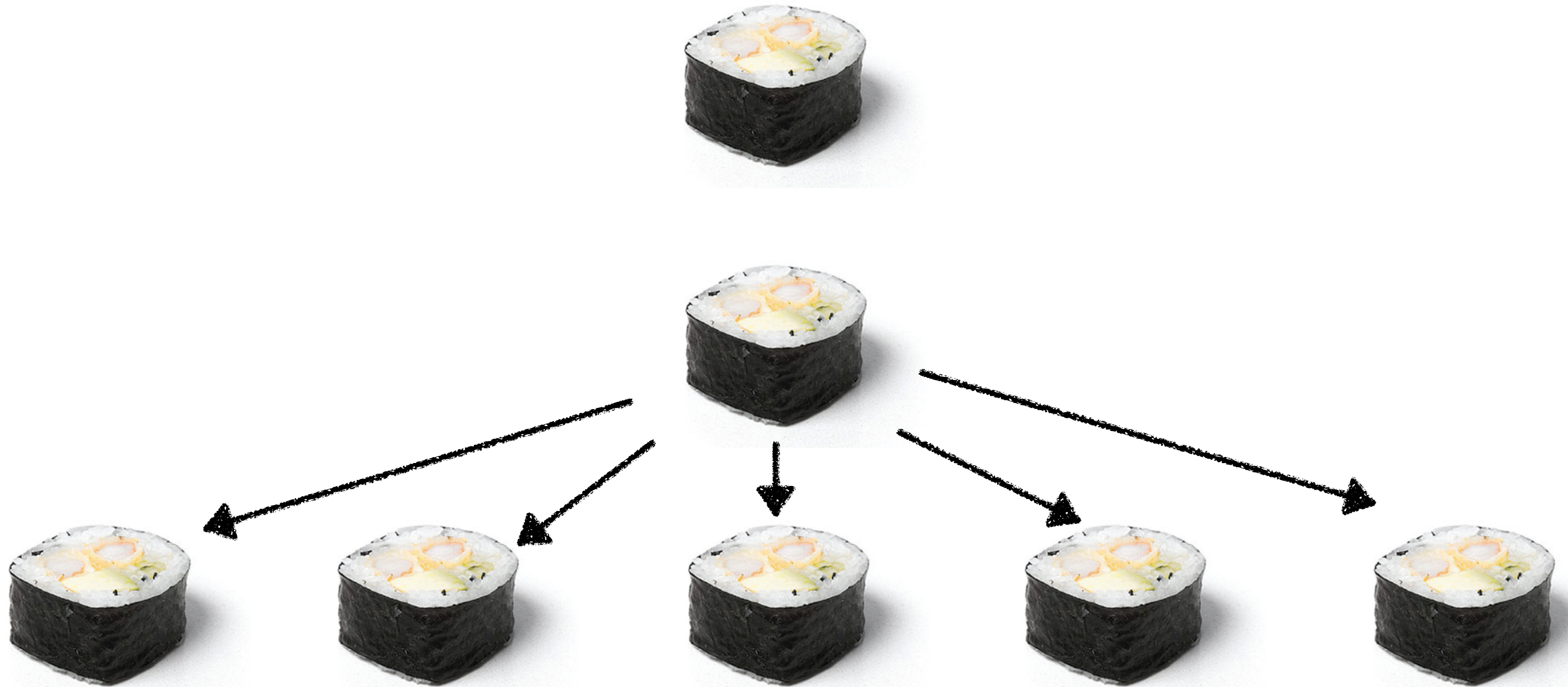


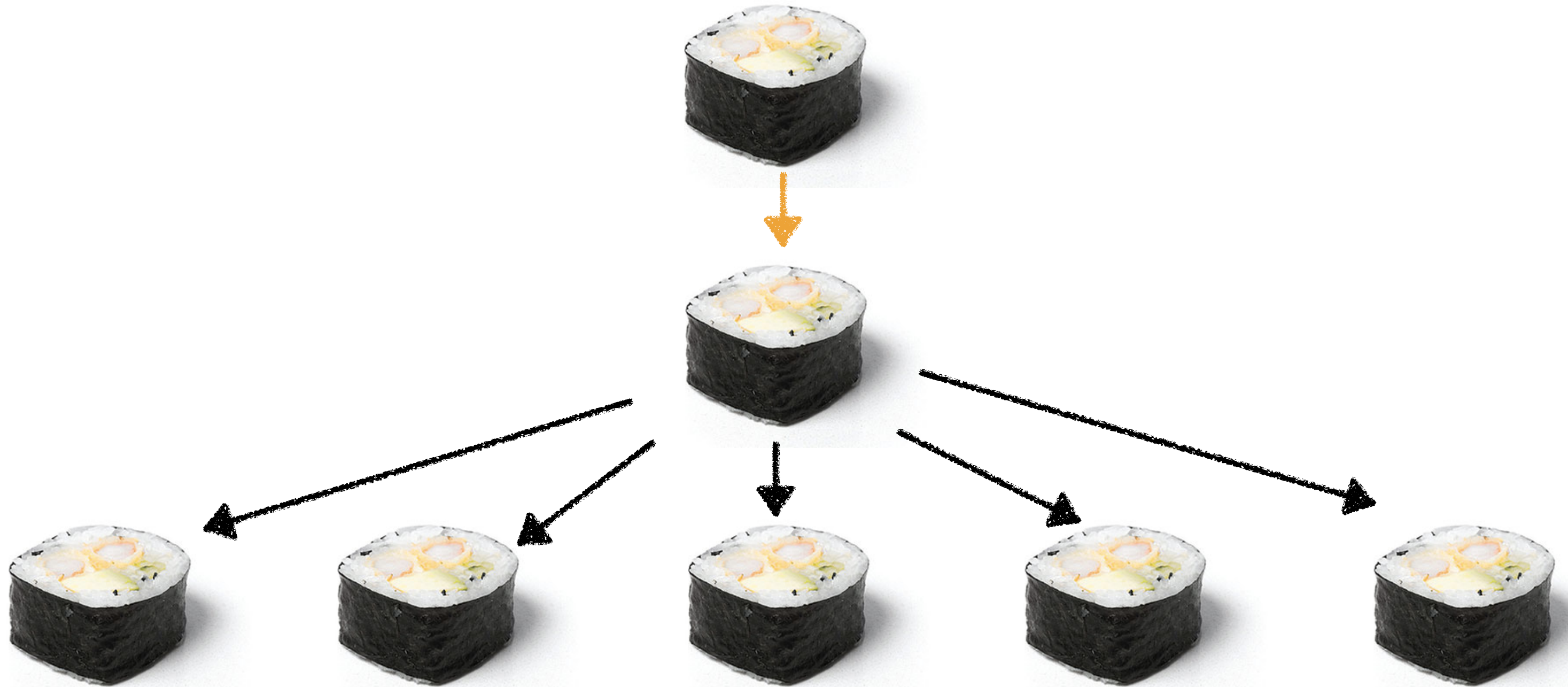






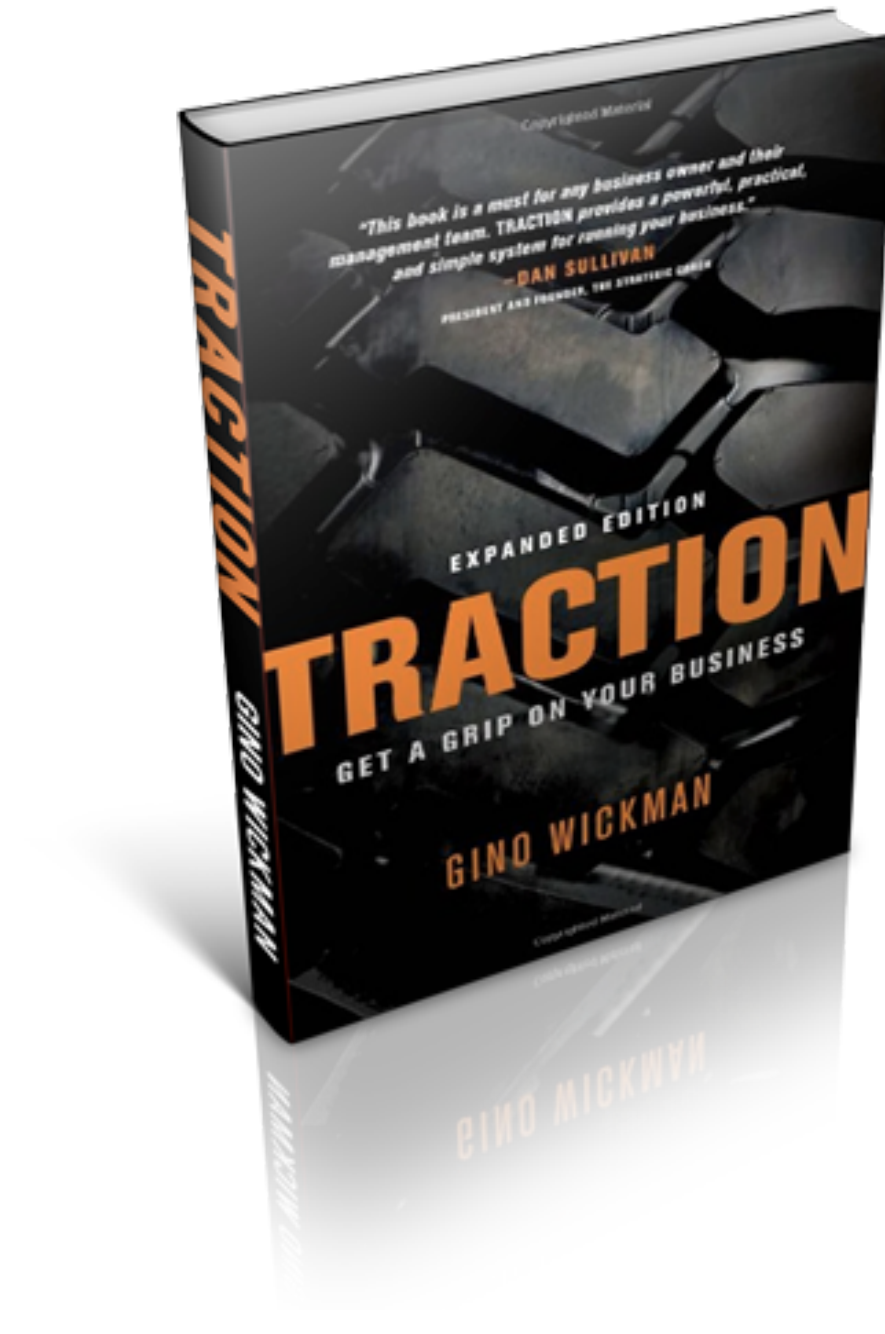




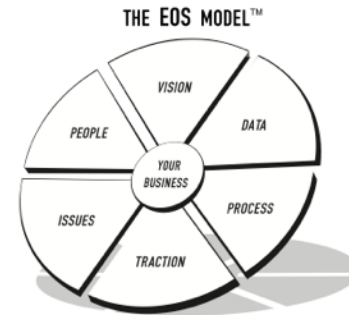


Entrepreneurial Operating System

- Simple, practical tools
- Used by thousands of companies
- <http://www.eosworldwide.com>



Step 1: Create and agree on a **Vision of Success**



THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME: _____

VISION

CORE VALUES	<ol style="list-style-type: none"> 1. 2. 3. 4. 5. 	3-YEAR PICTURE™
CORE FOCUS™	<p>Purpose/Cause/Passion:</p> <p>Our Niche:</p>	<p>Future Date:</p> <p>Revenue:</p> <p>Profit:</p> <p>Measurables:</p> <p><u>What Does It Look Like?</u></p> <ul style="list-style-type: none"> • • • • • • • • • •
10-YEAR TARGET™	<hr/> <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>	

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Step 1: Create and agree on a Vision of Success



THE VISION/TRACTION ORGANIZER™

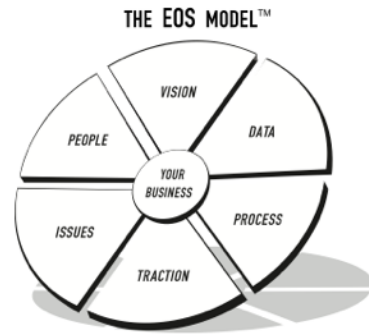
ORGANIZATION NAME: The Whole Brain Group

CORE VALUES	<ol style="list-style-type: none"> 1. We seek excellence in everything we do. 2. We care and nurture relationships. 3. Our communication is honest and respectful. 4. Our service is enthusiastic and engaged. 5. We are driven to learn and improve. 	3-YEAR PICTURE™
CORE FOCUS™	<p>Proposed/Current/Future: Helping small businesses grow and achieve their vision.</p> <p>Our Model: Supporting growing companies with scalable marketing and sales solutions.</p>	<p>Future Date: December 31, 2017</p> <p>Revenue: \$4M, Net Profit: 20%, Gross Profit: 30%</p> <p>Full-Time Manager (FTE): 141,000</p> <p>What does it look like?</p> <ul style="list-style-type: none"> • Larger team, increase right person/right role • community outreach programs • positive culture that fosters health and wellness • robust staff rewards system • challenge top our clients to work • positive internal and external image/vision/mission • measurable client results with strong ROI • client success consistent to reduce input • expanded services to support client growth • established affiliate network • strongest subject matter • increased pattern for thought leadership
CORE TARGET	<p>Future Date: December 31, 2017</p> <p>The Whole Brain Group is recognized as a world-class inbound marketing agency with a highly engaged team, delighted customers, and deep roots in our community.</p>	
MARKETING STRATEGY	<p>Target Market™/The Lead™: Growing companies with revenues of \$5M - \$10M who want to follow a proven marketing process and have a clear vision for building a great company.</p> <p>Three Objectives:</p> <ol style="list-style-type: none"> 1. Connecting sales and marketing with a results-driven strategic process 2. Meaningful relationships with long-term customers who view us as part of their team 3. Connecting entrepreneurs to resources and best practices that help them address growth challenges <p>Process Promise: The Whole Brain Way</p> <p>Remember: To delight our clients with our service, care for and protect their interests, and deliver measurable results with our proven process.</p>	

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Q2 2015 - Last Updated: 4/28/2015

Step 2: Agree on the Plan and Priorities



THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME: _____

TRACTION

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> <table border="1"> <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> </table> <ul style="list-style-type: none"> • Focus/Theme • Roles and Responsibilities • Cash Flow Analysis/Budget • Departmental Plans 	1.		2.		3.		4.		5.		6.		7.		<p>Future date:</p> <p>Revenue:</p> <p>Profit:</p> <p>Measurables:</p> <p>Rocks for the Quarter</p> <table border="1"> <thead> <tr> <th></th> <th>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>		Who	1.		2.		3.		4.		5.		6.		7.		<table border="1"> <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> <tr><td>8.</td><td></td></tr> <tr><td>9.</td><td></td></tr> <tr><td>10.</td><td></td></tr> </table> <p>Prioritize</p> <ul style="list-style-type: none"> • Identify • Discuss • Solve 	1.		2.		3.		4.		5.		6.		7.		8.		9.		10.	
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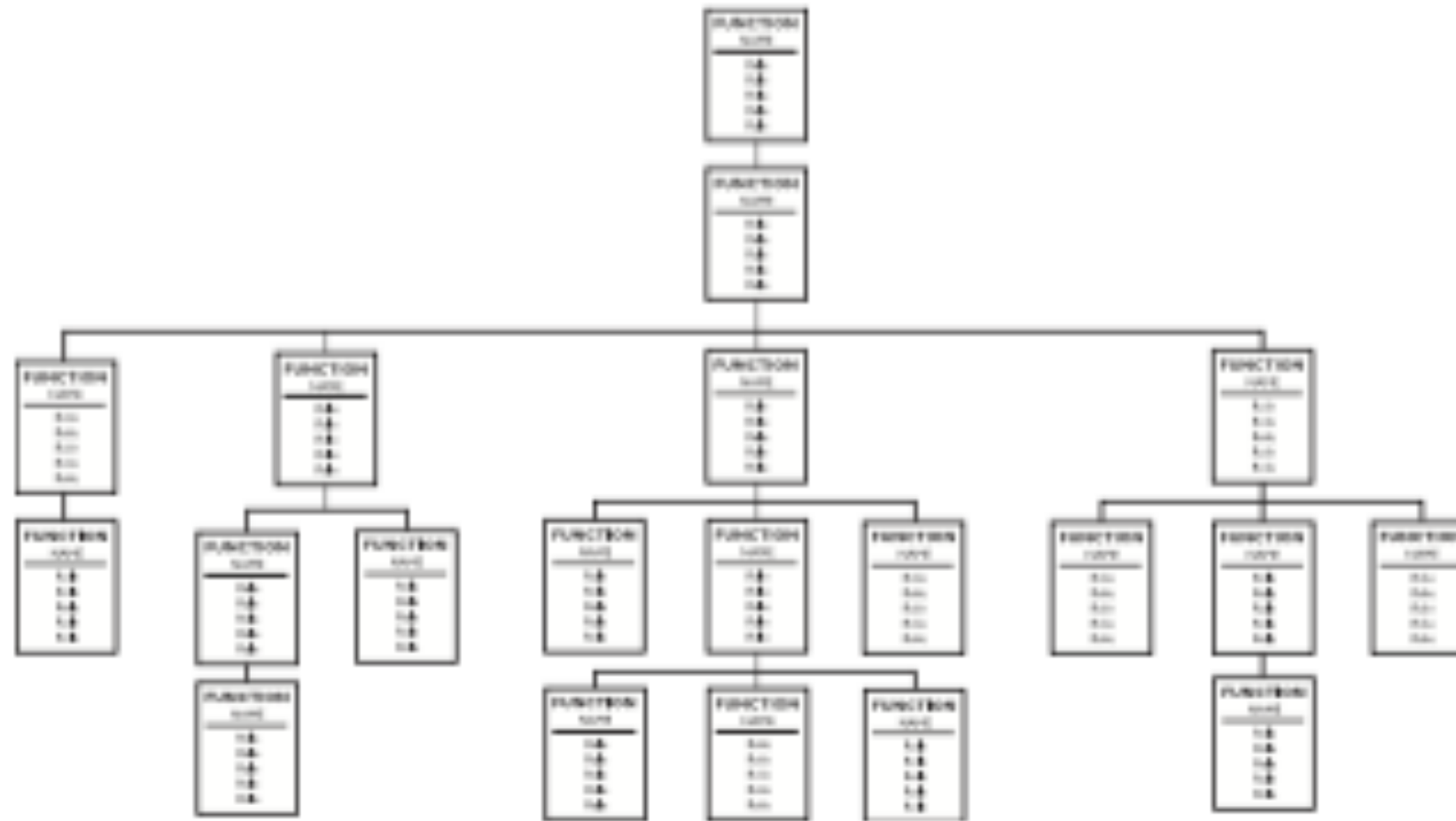
Step 2: Agree on the Plan and Priorities

ORGANIZATION NAME: The Whole Brain Group

1-YEAR PLAN	ROCKS	ISSUES LIST - Parking Lot																																																								
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Step 3: Create an **Accountability Chart**

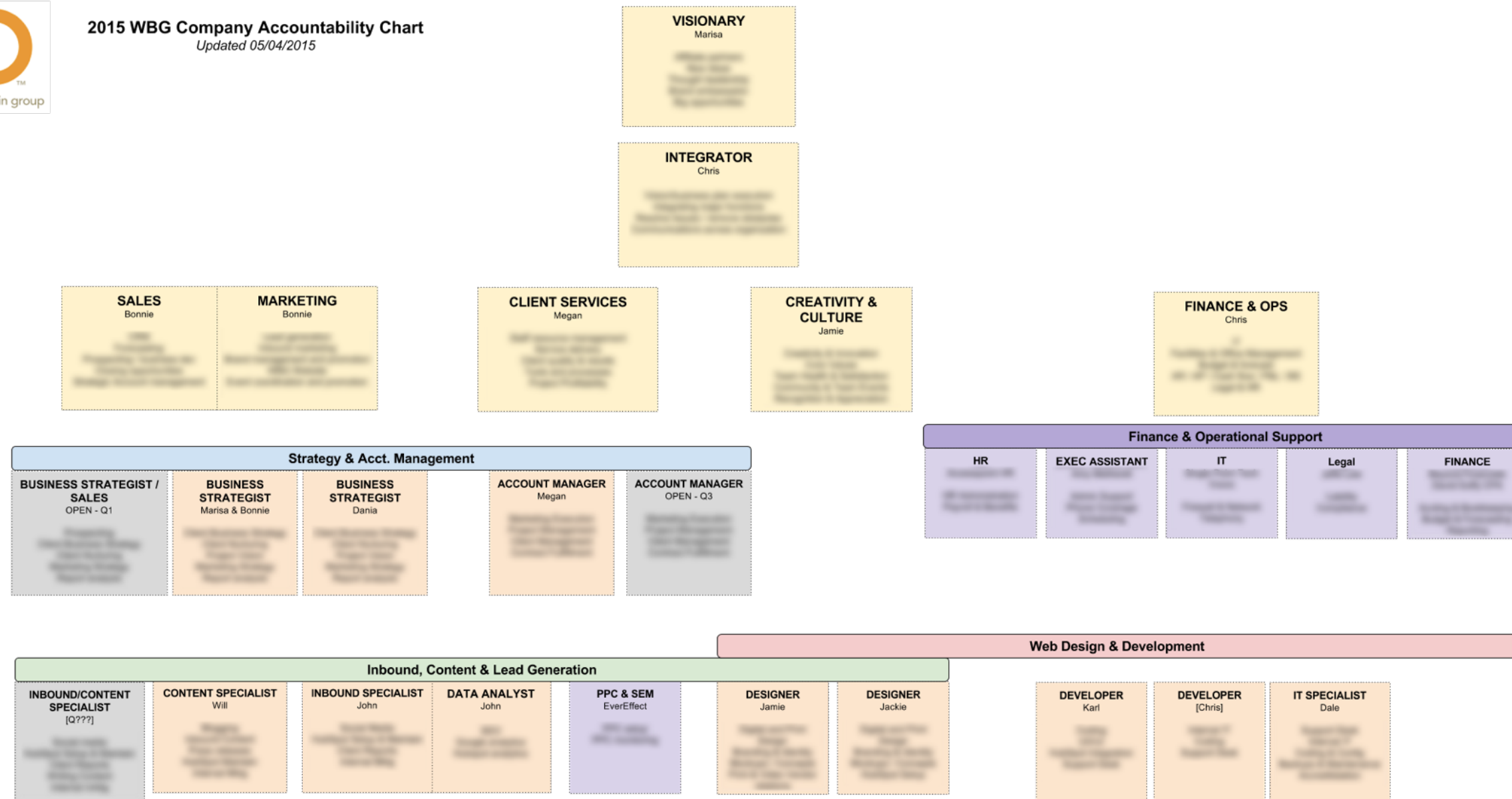
THE ACCOUNTABILITY CHART



Step 3: Create an Accountability Chart



2015 WBG Company Accountability Chart
Updated 05/04/2015



Step 4: Elevate or hire an **Integrator**

Visionary	Integrator
Big picture External relationships Creative problem solver Innovation Connect the dots Pulse on the industry & target market	Clarity & Communication Repetition is ok Holding people accountable Remove obstacles & barriers Steady force/consistency Integrates the leadership team
Inconsistency Short attention span Organizational "whiplash" Reluctance to let go Resistance to following process Foot on the gas pedal	Thankless job Accusations of pessimism Bad guy Lack of recognition Says "no" a lot Being accused of moving too slowly

Step 5: Build a **Team** that fits your core values

THE PEOPLE ANALYZER™

NAME	Positive	Organized	Driven	Coffee Lover					
Chandler	+/-	-	-	+					
Joey									
Rachel									
Monica									
Ross									

Rating: + +/- -

Step 6: Run great meetings & Solve Issues


THE LEVEL 10 MEETING™

The Weekly Agenda

Day: _____ Time: _____

Agenda:

Segue	5 Minutes
Scorecard	5 Minutes
Rock Review	5 Minutes
Customer/Employee Headlines	5 Minutes
To-Do List	5 Minutes
<hr style="border: 0; border-top: 1px dashed black;"/>	
IDS	60 Minutes
<hr style="border: 0; border-top: 1px dashed black;"/>	
Conclude	5 Minutes
Recap To-Do List	
Cascading messages	
Rating (1-10)	



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Entrepreneurial Operating System™

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Toolbox

Step 7: Manage to a Scorecard

COMPANY SCORECARD

WHO	MEASURABLES	GOAL	5-Jan	12-Jan	19-Jan	26-Jan	2-Feb	9-Feb	16-Feb	23-Feb	1-Mar	8-Mar	15-Mar	22-Mar	29-Mar

Step 8: (Re) Discover your Passion

DELEGATE AND ELEVATE™

Love/Great	Like/Good

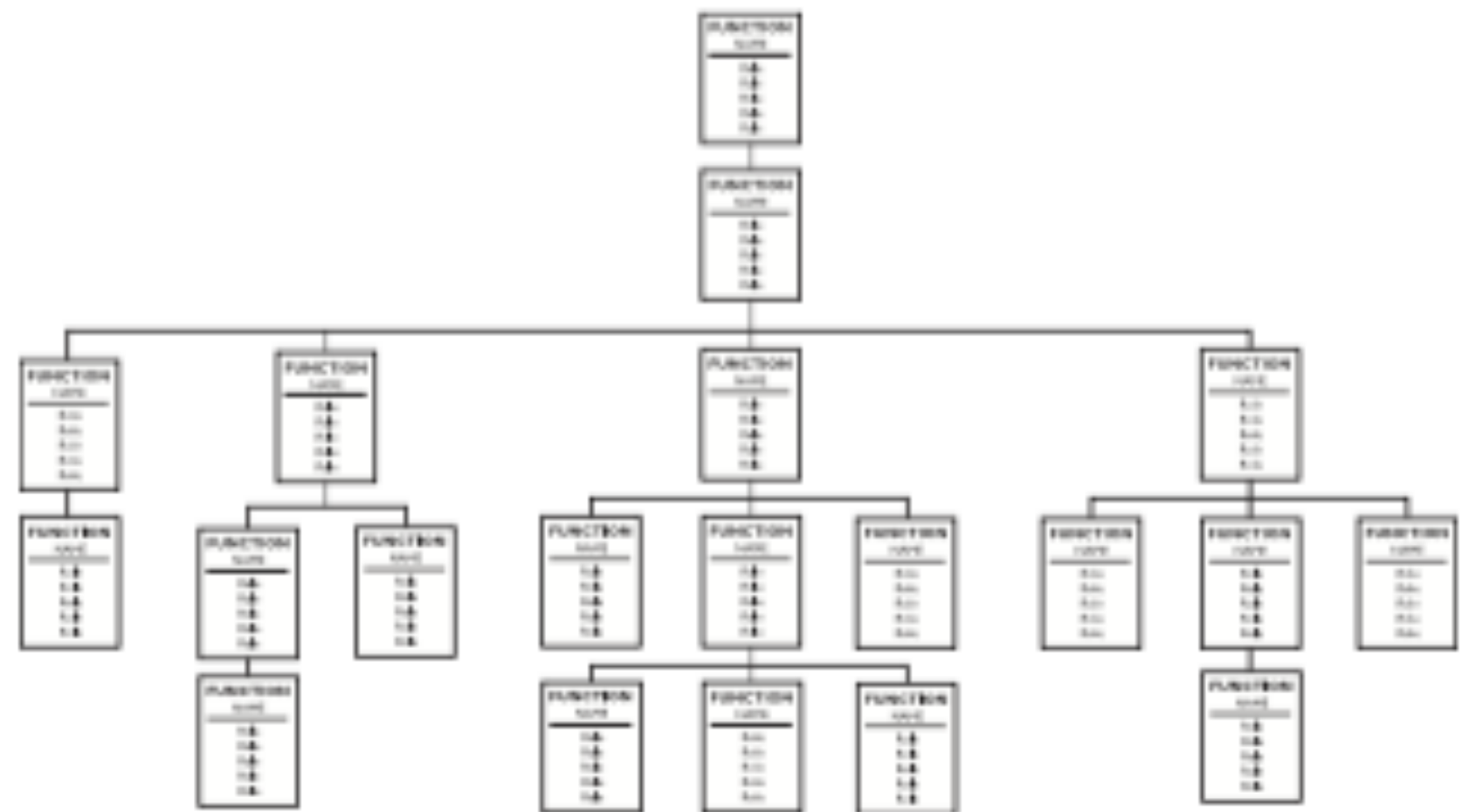
Don't Like/Good	Don't Like/Not Good



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Toolbox

THE ACCOUNTABILITY CHART



Look below the surface

What I thought the problems were	What the problems REALLY were
<ul style="list-style-type: none">- Not enough revenue and profit- Not enough people- People not taking ownership- Too much time managing people- Employee turnover and people drama- Too many meetings- I wasn't cut out to lead a growing company	<ul style="list-style-type: none">- Vision was not clear- Vision was not communicated- Unclear roles and responsibilities- Lack of accountability- Undefined core values for hiring and rewarding- Ineffective meetings- I needed an Integrator





Resources and next steps

- Everyone at Partner Day is getting a copy of **Traction** by Gino Wickman
- Download free EOS Tools - <http://eosworldwide.com/dl-tools>
- Find out if you're a Visionary or an Integrator - <http://www.rocketfuelnow.com>
- Email me - msmith@thewholebraingroup.com



Next Up

Point Pricing: An Inside Look at PR 20/20's Value Based Pricing Model

(Paul Roetzer, PR 20/20)

In Benioff

Growth Driven Design: Creating a Retainer-based Website Redesign Model

(Luke Summerfield, HubSpot)

In Angelou

Sales Hiring for Agencies

(Pete Caputa, David Weinhaus, HubSpot)

In Aristotle

HubSpot's Financing Benefit for Platinum Partners and M&A Workshop

(Arjun Moorthy, HubSpot)

In Walske