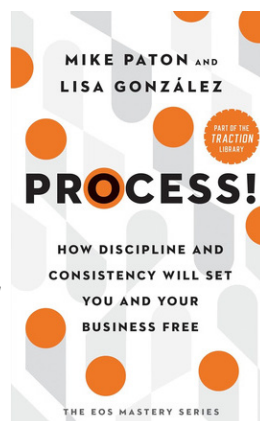




**CO-AUTHOR OF  
EOS BEST-SELLER:**



# Process Success™

WITH *Lisa González*

## Lisa González

Lisa grew up in an entrepreneurial family and has always been passionate about building businesses that create both freedom and results. A former business lawyer turned EOS Implementer®, she helped grow a design/build company into one of the largest in the country. Lisa now coaches leadership teams, speaks nationwide, and co-authored the EOS® book Process!—she knows how to make EOS and Process stick because she's lived it

## Agenda

Documenting and following your core processes creates freedom, scalability, and consistency.

- ✓ Commit
- ✓ 3-Step Process Documenter
- ✓ FBA Checklist

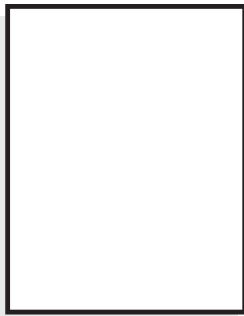
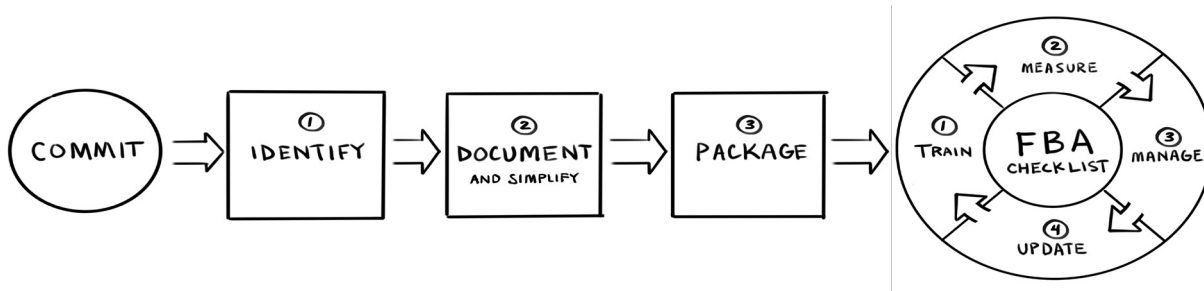


## Find Where Your Profits are Leaking.

If your team is struggling, the issue might not be them. It might be what they've never been shown.

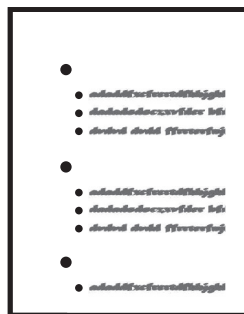


# 3-STEP PROCESS DOCUMENTER™



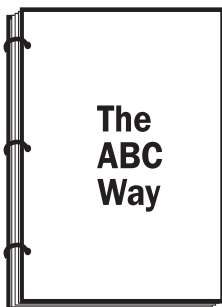
## Step 1 - Identify

- Identify your handful of core processes
- Make a list (HR, Marketing, Sales, Several Operations, Accounting, Customer Service/Retention, etc.)
- Give each of them a name, with everyone agreeing to use that name



## Step 2 - Document

- One at a time, record the major steps in each core process:
  - Favor a linear/chronological approach
  - Each major step should be supported by 1-5 sub-points defining the who/what/where/ when/how
  - Keep it simple (the 20/80 approach) Each core process should be fully documented in 1-5 pages
- Review and approve each core process – every member of the leadership team must agree this is the right way to do it every time
- Repeat this step for every core process



## Step 3 - Package

- Combine each documented and simplified core process into a binder, online folder or other accessible, easy-to-find package
- Turn your list of core processes (from Step 1) into your table of contents
- Give it a name. The ABC Way, Franchise Model, Operating Model, SOP, Circle of Life, etc.

# FOLLOWED BY ALL (FBA) CHECKLIST

With your core processes documented, simplified, packaged and approved by the leadership team, it's now time to get them followed by all. This will create consistency, scalability, efficiency, ease of management, more fun, peace and profitability for your organization. Simply follow this four-part checklist:

## TRAIN

☐

- Train everyone who will perform one or more of the steps in each process
- Train in Level 10 Meetings™, special training sessions or learning management systems

## MEASURE

☐

- Measure performance on the appropriate Scorecard (company/department)
- Confirm compliance with the steps in each process
- Confirm that activities required for success are being done properly, and with enough frequency to achieve the goals

## LMA™

☐

- Lead, manage and hold everyone accountable, everyone to follow the process
- Keep scorecard numbers on-track
- Call out and IDS™ issues immediately as they arise – no exceptions

## UPDATE

☐

- Update core processes regularly
- As issues arise, sometimes the process is the root cause and must be revised
- Cleanup, simplify and retrain one core process per quarter

# SAMPLE: THE H/R PROCESS

## The Search

- Define role/job description/salary (the seat in the Accountability Chart™)
- Decide search medium
- Begin search
- E-mail blast to sphere/peers

## Interviewing

- Screen résumés
- Initial interview/profiling tools
- 2nd interview
- Check references
- CEO interview

## Hiring

- 8-hour on-the-job trial
- Decision
- 90-day trial

## Orientation

- H/R policy/review employee manual
- Benefits review/forms
- Job training
- CEO orientation (company story/core ideology)

## Quarterly Conversations

- What's working, what's not?
- Review the 5-5-5™/People Analyzer™ (RPRS)
- Review LMA questionnaires
- Delegate and elevate opportunities
- Update Accountability Chart if necessary

## Annual Reviews

- Manager fills out People Analyzer, including GWC™ in preparation for the review
- Document the review and have it signed by all parties
- File the review with the H/R department

## Termination

- 3-strike system (30-30-30)
- Terminate upon 3rd strike
- Contact legal counsel
- Meet with employee/have H/R present
- Exit interview
- Document termination and have it signed by all parties