

# **Get a Grip on Your Business**

**Free Yourself Up to Move in the Direction You Want,  
at the Speed You Want**

**John Fulwider, PINNACLE Business Growth Guide**



**PINNACLE**  
BUSINESS GUIDES



STRATEGIC GUIDANCE FOR BUSINESS GROWTH

POWERED BY YOU



# THE SELF-MANAGING COMPANY

Freeing yourself up from everything that prevents you from creating a 10x bigger future.

**Dan Sullivan**  
Cartoons by Hamish MacDonald



# Entrepreneurial Freedom Comes From Going In The Right Direction

## TIME

SPENDING YOUR TIME IN CIRCUMSTANCES & OBLIGATIONS YOU DON'T LIKE.

## MONEY

OTHER PEOPLE DECIDING HOW MUCH MONEY YOU MAKE.

## RELATIONSHIP

WORKING WITH ANYBODY WHO HAS A PULSE & A WALLET!

## PURPOSE

BEING INVOLVED IN THINGS THAT YOU DON'T FIND PARTICULARLY MEANINGFUL.



## TIME

SPEND YOUR DAYS DOING ONLY THE THINGS THAT YOU LOVE TO DO & DO BEST.

## MONEY

HAVE NO LIMIT ON WHAT YOU CAN MAKE. IT'S ALL A FACTOR OF HOW MUCH VALUE YOU CAN CREATE.

## RELATIONSHIP

SPEND TIME ONLY WITH PEOPLE YOU LIKE & WHO ARE ALIGNED WITH YOU.

## PURPOSE

HAVE ALL YOUR ACTIVITIES CONNECTED & CONTRIBUTING TO YOUR HIGHEST VALUES & GOALS.

**YOU CAN'T GET AWAY FROM WHAT YOU DON'T LIKE UNTIL YOU'RE VERY CLEAR ABOUT WHAT YOU DO LIKE!**

## The Four Entrepreneurial Freedoms



Time



Money



Relationship



Purpose



“

**MONEY IS JUST A FREEDOM-PURCHASING CAPABILITY.**

”

*Jay Sullivan*



**MonTag**<sup>®</sup>

**Getting Traction  
with EOS<sup>®</sup>**

**WE DON'T JUST TALK EFFICIENCY...  
WE DELIVER IT**



  
**MonTag**<sup>®</sup>

**“We spend a little more time on the ‘keeping it from happening again’ item by creating to-dos to create a new simple process. Process is what’s going to help us make sure everyone is playing the game with the same rulebook.”**



**“That can get really frustrating in a manufacturing company where you have engineers, operations, finance, product support, sales, playing together.”**



**“We have had a significant issue with tribal knowledge, legacy, ‘we just know it,’ and those aren’t very scalable as you bring people on.”**



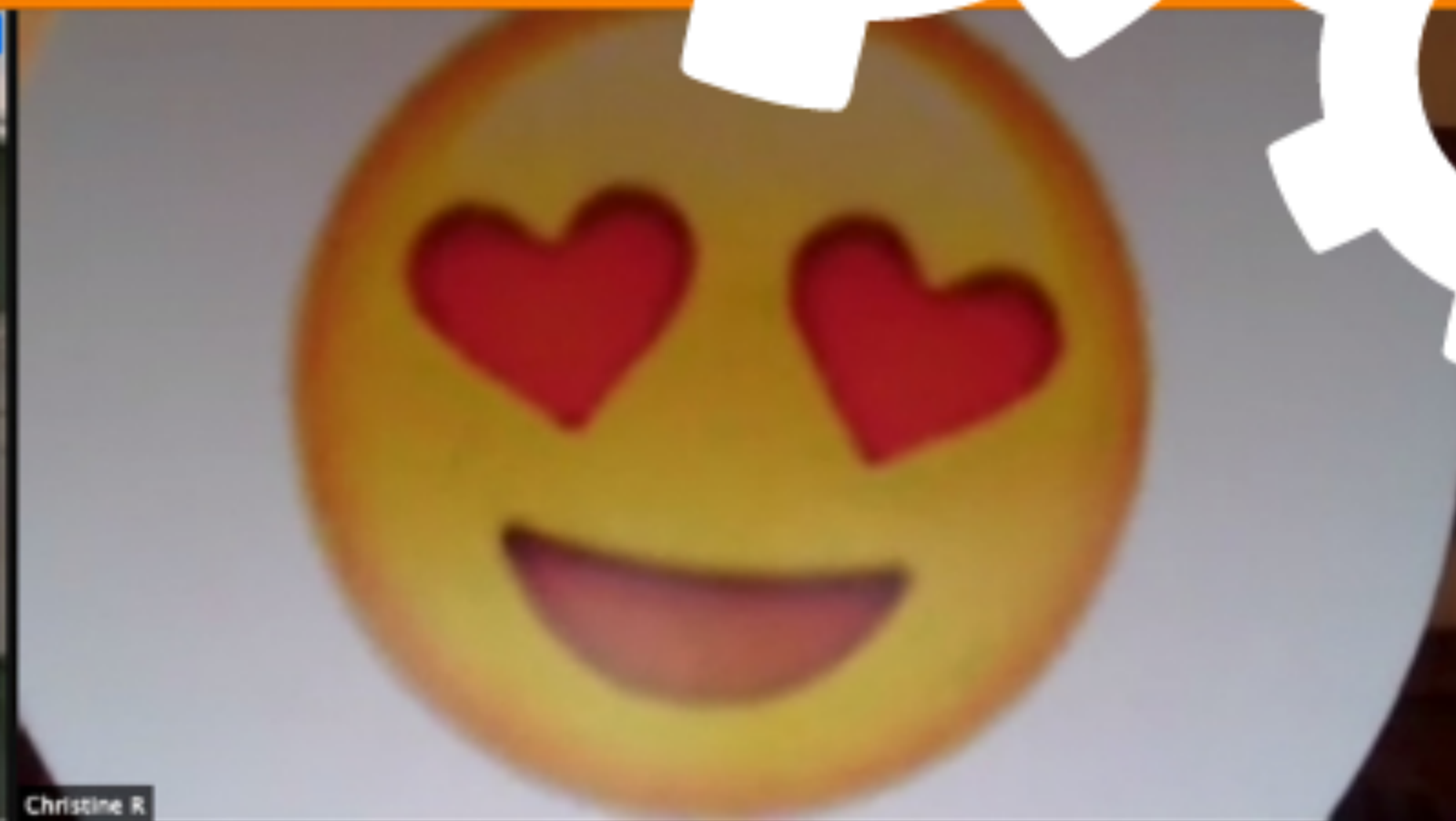




ANN PACKERHAM



Dave Alburty



Christine R



Andrew Page



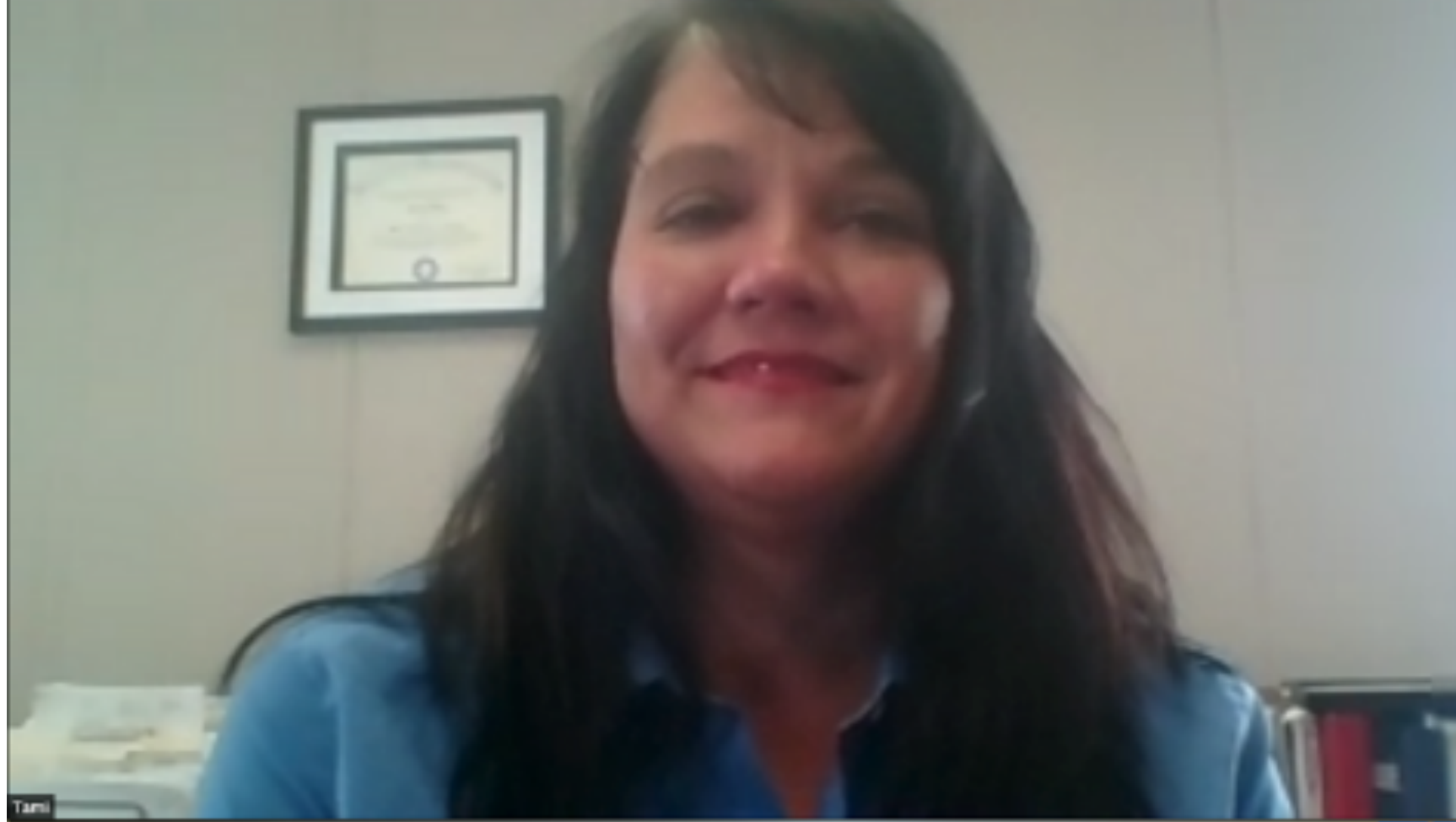
Kathi R



Kevin Ray



**GETTING TRACTION  
WITH EOS**



Tami



John Fulwider



Patrick Brann



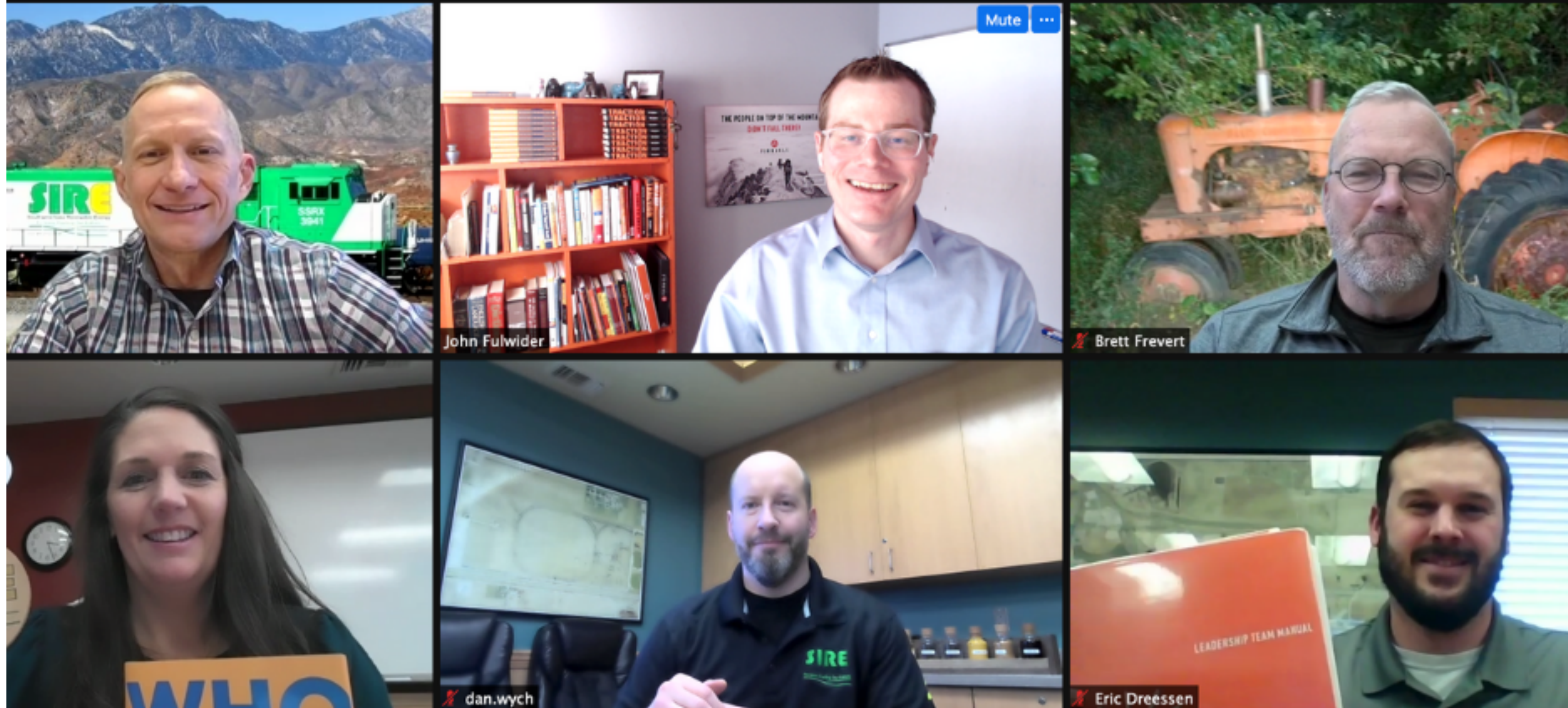
Jim Reinders



**Paracclipse<sup>®</sup>**  
Fly Control Systems



**Getting Traction  
with EOS<sup>®</sup>**



# Getting Traction with EOS<sup>®</sup>

## WHY EXECUTION FAILS



### THE WHIRLWIND

- Existing work
- Urgent tasks that need attention now

People are caught up in the whirlwind of urgent daily work, which saps their time, energy and focus.



VS



### WILDLY IMPORTANT GOALS

- New activities
- Important tasks that affect future success

People lack clarity, commitment and accountability to deliver the new strategic goals.



## THE PINNACLE PRINCIPLE

**PEOPLE**

+

**PURPOSE**

+

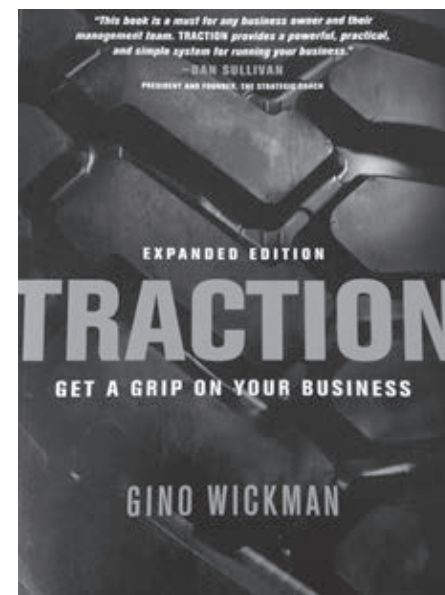
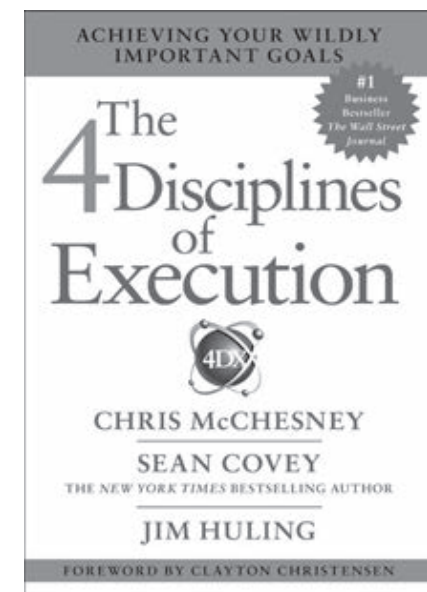
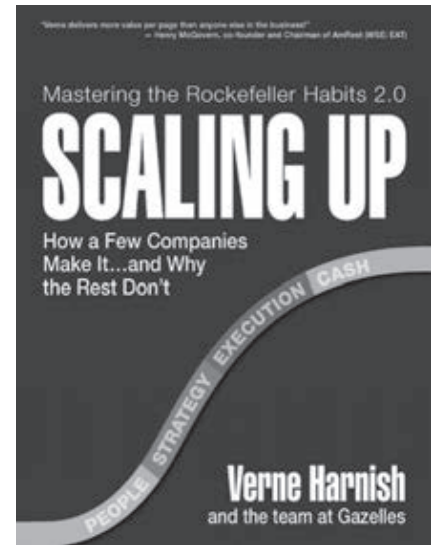
**PLAYBOOK**

+

**PERFORMANCE**

=

**PROFITS**



DESCRIPTION	E MYTH	GREAT GAME OF BUSINESS	SCALING UP	EOS	4 DISCIPLINES OF EXECUTION
RIGHT PEOPLE IN RIGHT SEATS	○	○	●	○	●
HIRING / RECRUITING "A PLAYERS"	○	○	●	○	○
FUNCTIONAL ACCOUNTABILITY	○	○	●	●	○
PROCESS ACCOUNTABILITY	●	○	●	○	●
VISION & PURPOSE	●	○	●	○	○
STRATEGY	○	○	●	○	●
PLANNING	○	●	○	○	○
BUSINESS DEVELOPMENT	●	○	○	○	○
MARKETING / BRANDING	●	○	●	○	○
OPERATIONS EXECUTION	●	●	○	●	●
PROCESS IMPROVEMENT	○	●	○	○	●
ROCKS / GOALS	○	●	○	○	●
DATA / SCORECARD	●	●	○	○	○
SCOREBOARD— WIN THE WEEK	○	○	●	○	●
TEAM HEALTH	○	○	○	○	○
CASH MANAGEMENT	●	○	●	○	○
OPEN BOOK MANAGEMENT	○	●	○	○	○
PROFIT TOOLS	○	○	●	○	○
STICKY TERMS	○	○	○	○	○
ENJOYABLE TO IMPLEMENT	○	○	○	○	○
LEADERSHIP DEVELOPMENT	○	○	○	○	○
FLEXIBILITY TO CUSTOMIZE TO CLIENT	○	○	●	○	○

GRADE:



NA



OK



GOOD



BETTER



BEST

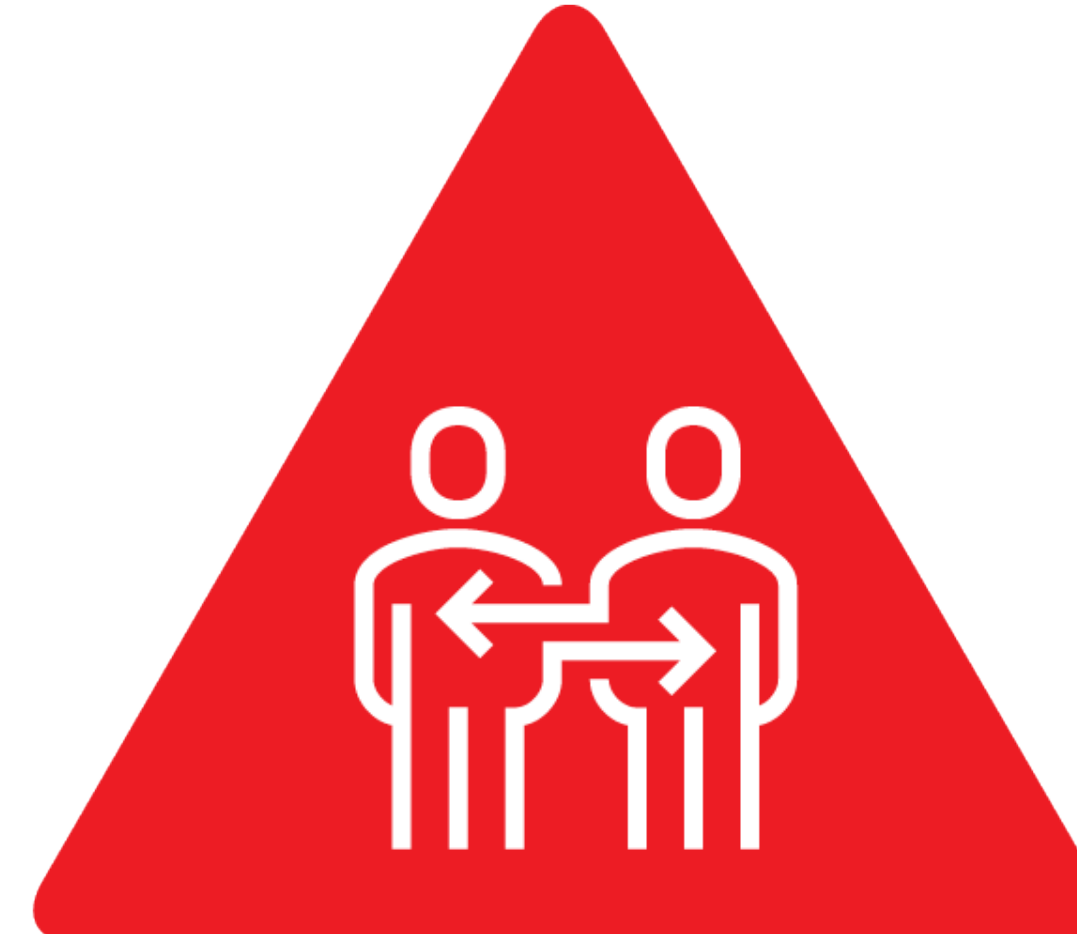
# People

**The right people in the right seats doing the right things, right.**



## **Talent Assessment**

Know how many  
A Players you have.



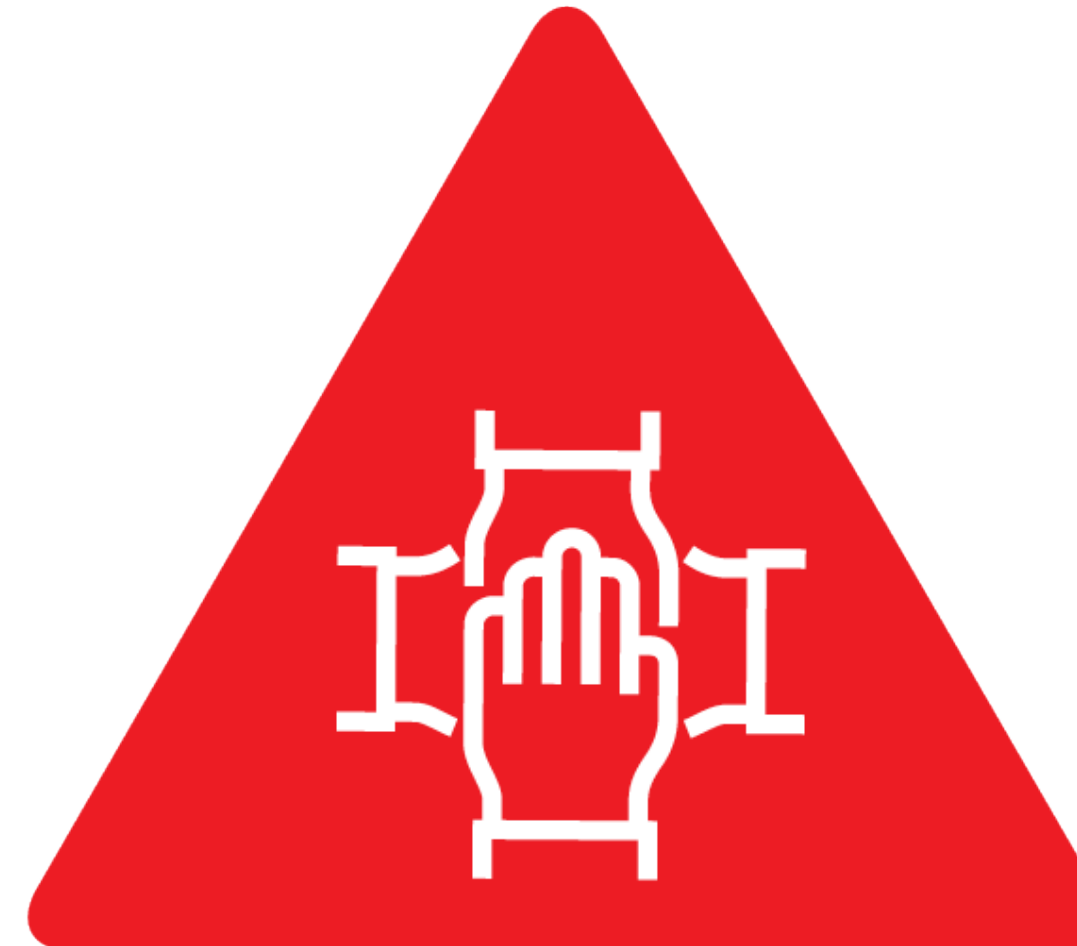
## **Functional Accountability**

Know who owns each  
major function of your  
business.



## **Process Accountability**

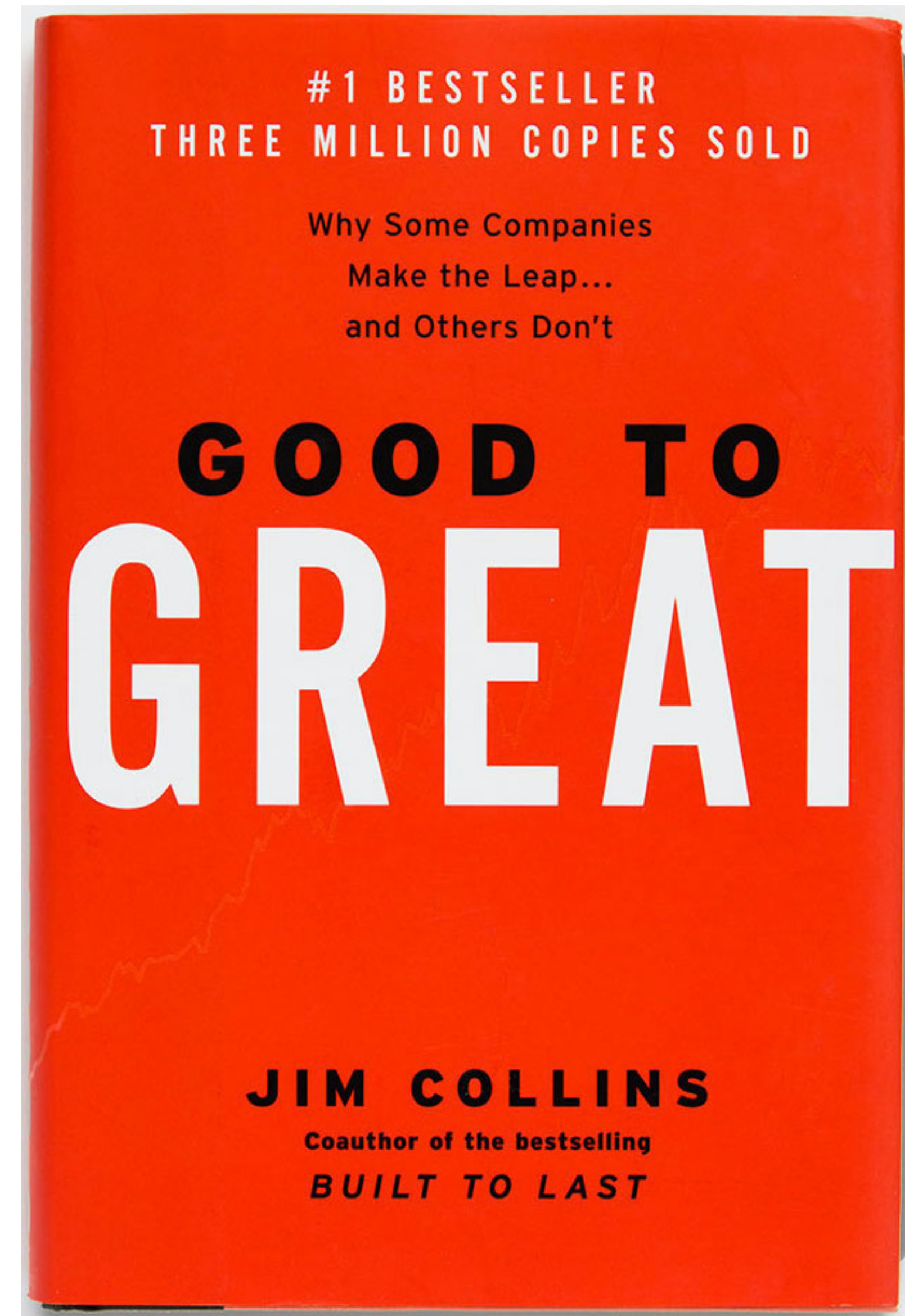
Know who owns  
each of your  
Core Processes.



## **Team Health**

Get all your people  
working together  
productively and trusting  
their colleagues.

**“We expected that good-to-great leaders would begin by setting a new vision and strategy. We found instead that they first got the right people on the team, the wrong people off the team, and the right people in the right seats.”**



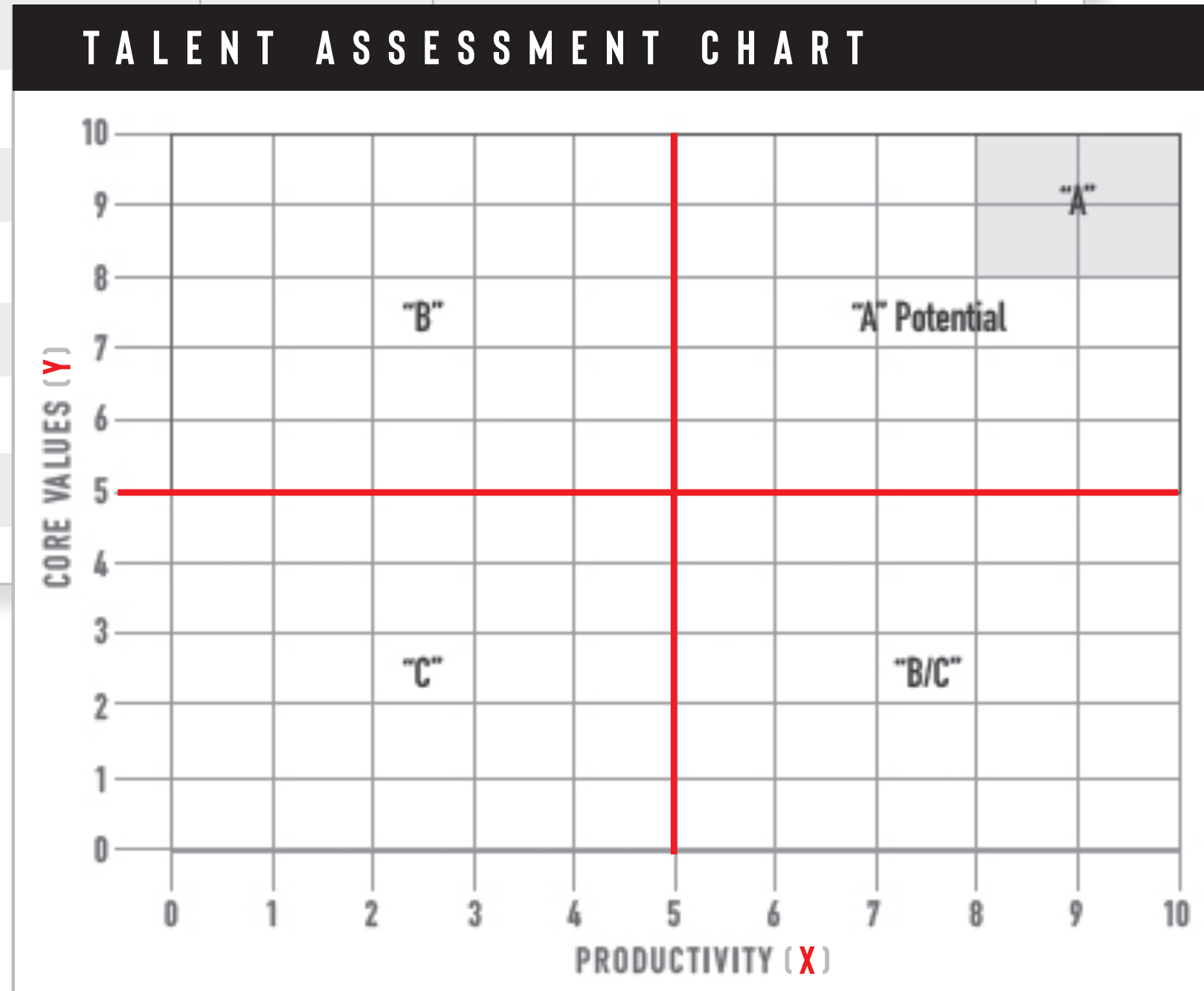




### TEAM TALENT ASSESSMENT EXERCISE

Enter the initials of your team members. For each team member, assign their Cultural Fit Score (0-10) based on how well they live and exemplify our Culture and their Productivity Score (0-10) based on how well they deliver results for their specific role. Next, plot them on the graph on page two below. Hold on Rating for now until after you plot on the chart. Finally determine any action or coaching required.

TEAM MEMBER INITIALS	CORE VALUE SCORE (0-10)	PRODUCTIVITY SCORE (0-10)	RATING: A, B, B/C, C	ACTION PLAN FOR NEXT QUARTER



This chart is a top grading tool that provides a clear definition of "A" players by measuring team members on a two-axis scale. The X axis measures productivity for their specific role. The Y axis measures cultural fit.

### FUNCTIONAL ACCOUNTABILITY CHART

- Using your profit and loss, balance sheet and cash flow statements assign a person to each line item. Then derive appropriate results/outcomes for each function.
- List Key Performance Indicators (KPIs) for each function.
- Name the person accountable for each function
- Ask the questions below the chart, for each names listed for each function

FUNCTIONS	3 PERSON ACCOUNTABLE	2 KPIs	1 RESULTS/OUTCOMES (PL OR B/S)
Visionary			
CEO			
Marketing			
Sales			
Operations			
Treasury			
Controller			
Technology			

- Identify:
  - More than one person in a seat?
  - Person in more than one seat?
  - Empty seats?
  - Enthusiastically rehire?

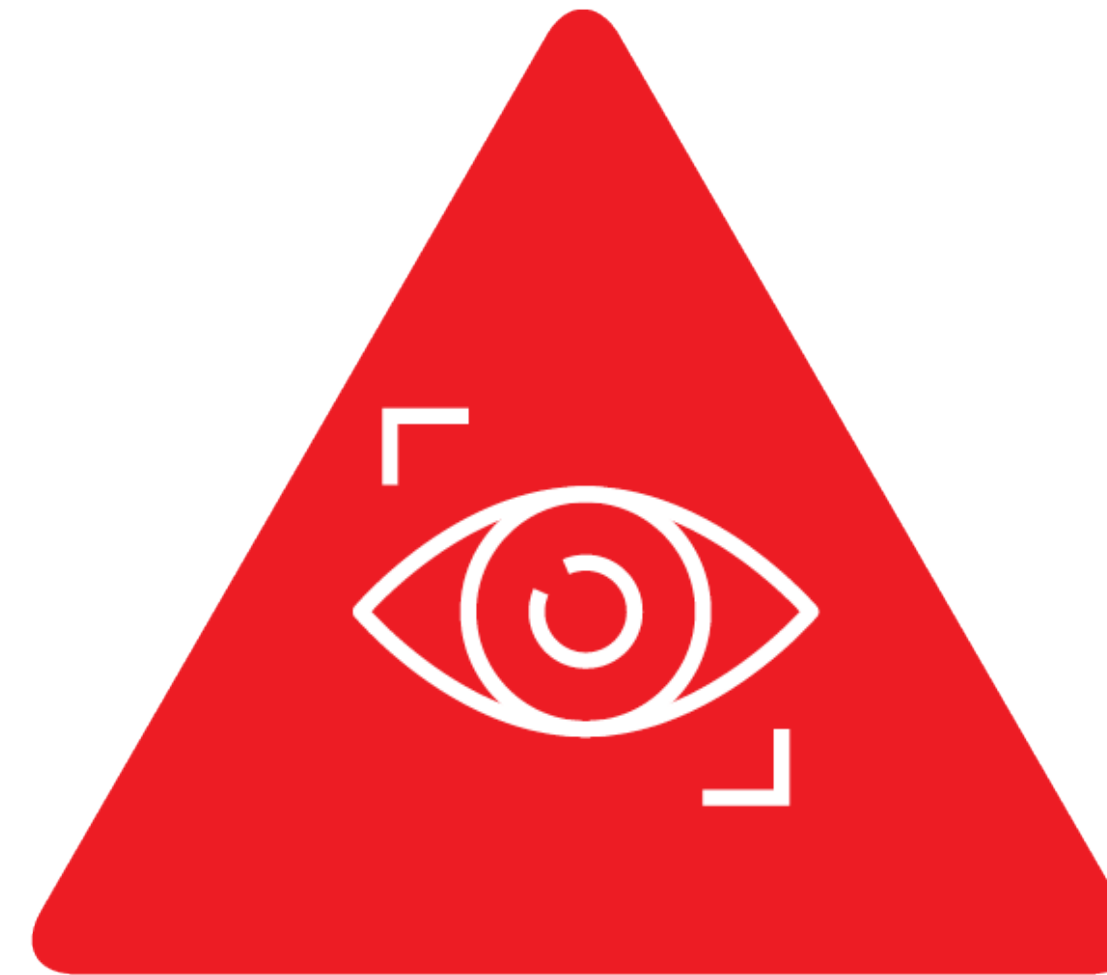
# Purpose

Your vision for growth out of your head and into the heads of people who want to execute it.



## Strategy

Know we'll win business by being different.



## Vision and Plan

Condense your entire growth vision and plan down to two simple pages.



## Brand Message

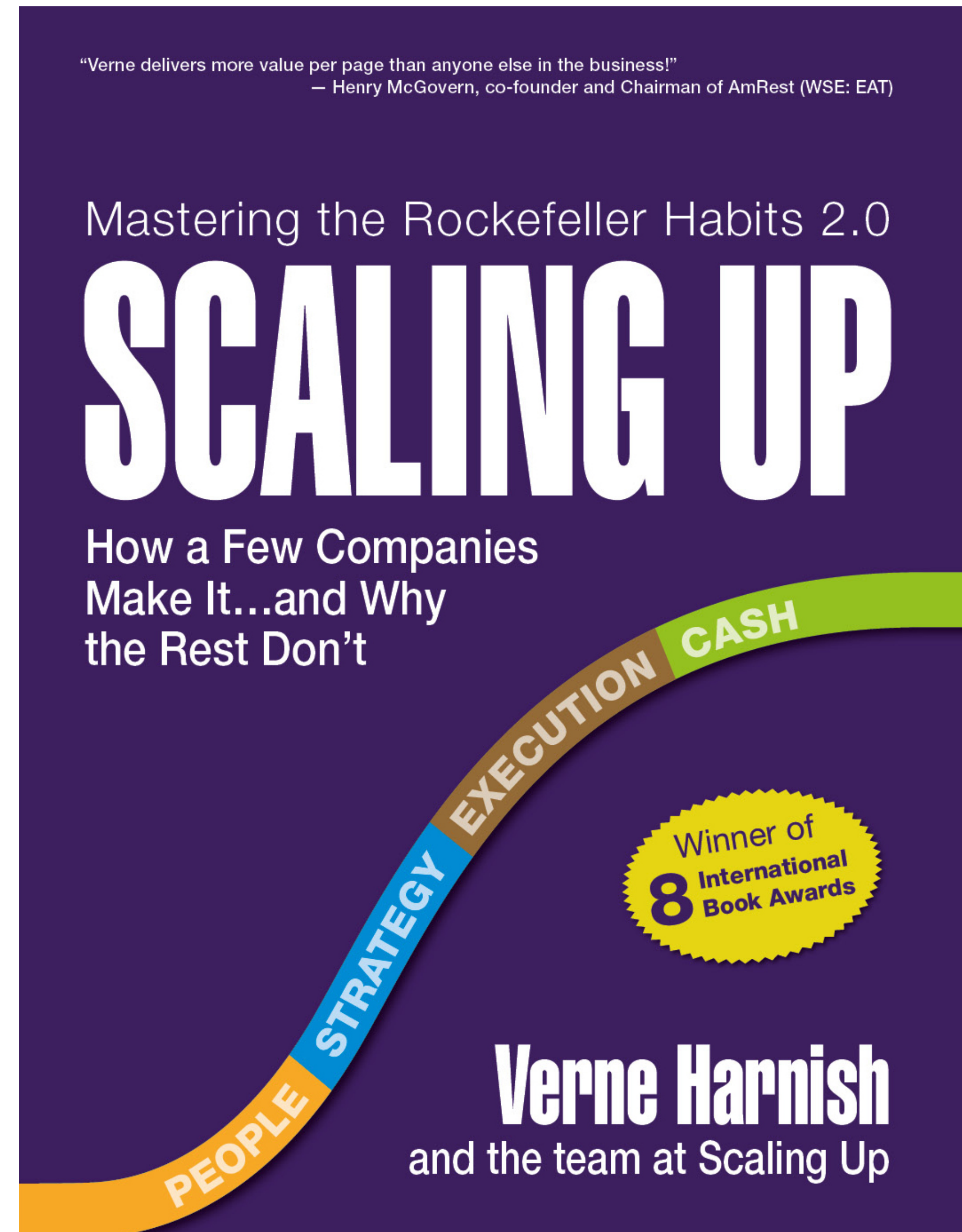
Sell more by telling stories in which your customer is Luke Skywalker and you're Yoda.



## Codified Culture

Enjoy freedom of relationship because you only hire people who behave according to your unique Core Values.

**“When you nail your strategy, top-line revenue growth and fat margins come almost effortlessly.”**



**“Too many companies try to be all things to all people. That is a strategy for mediocrity. You have to actively search for high profit customers and make them central to your strategy.”**



**Walmart and Target with their  
marketing budgets don't  
market to everyone...  
*so why would you?***

**“Strategy is about setting yourself apart from the competition. It’s not a matter of being better at what you do—it’s a matter of being different at what you do.”**

**HBR'S  
10  
MUST  
READS**

**FEATURING**  
“What Is Strategy?”  
By Michael E. Porter

**On  
Strategy**

If you read nothing else on strategy, read these definitive articles from **Harvard Business Review**.



### STRENGTH TEST YOUR STRATEGY

MOUNTAIN NAME: \_\_\_\_\_

**WORDS YOU OWN (MINDSHARE):** Think Products or Services that you created or deliver to your clients


#### SANDBOX & BRAND PROMISES:

WHO/WHERE (CORE CUSTOMERS)	WHAT (PRODUCTS & SERVICES)	BRAND PROMISES	KPIs

**BRAND PROMISE GUARANTEE (CATALYTIC MECHANISM):**

**ONE-PHRASE STRATEGY (KEY TO MAKING MONEY):**

**DIFFERENTIATING ACTIVITIES (3-5 HOWS):**

**X-FACTOR (1x - 10x UNDERLYING ADVANTAGE):**

**PROFIT PER X (ECONOMIC ENGINE):**

**PINNACLE (7-10 YEAR GOAL):**

### TRENDS, WEAKNESSES & STRENGTHS

#### TRENDS

What are changes in technology, distribution, product innovation, markets, consumer, social trends that might impact your industry and organization?

#### STRENGTHS/CORE COMPETENCIES

What are the strengths of the organization that have been the source of your success?

#### WEAKNESSES

What are the weaknesses of the organization that aren't likely to change?



**One Montag product on every  
farm in the Corn Belt by 2040.**



# Playbooks

You're playing to win, instead of playing not to lose.



## Core Processes

Simplify your secret sauce into checklists.



## Practice Schedule

Keep running the play until you've mastered it.



## Meeting Structures

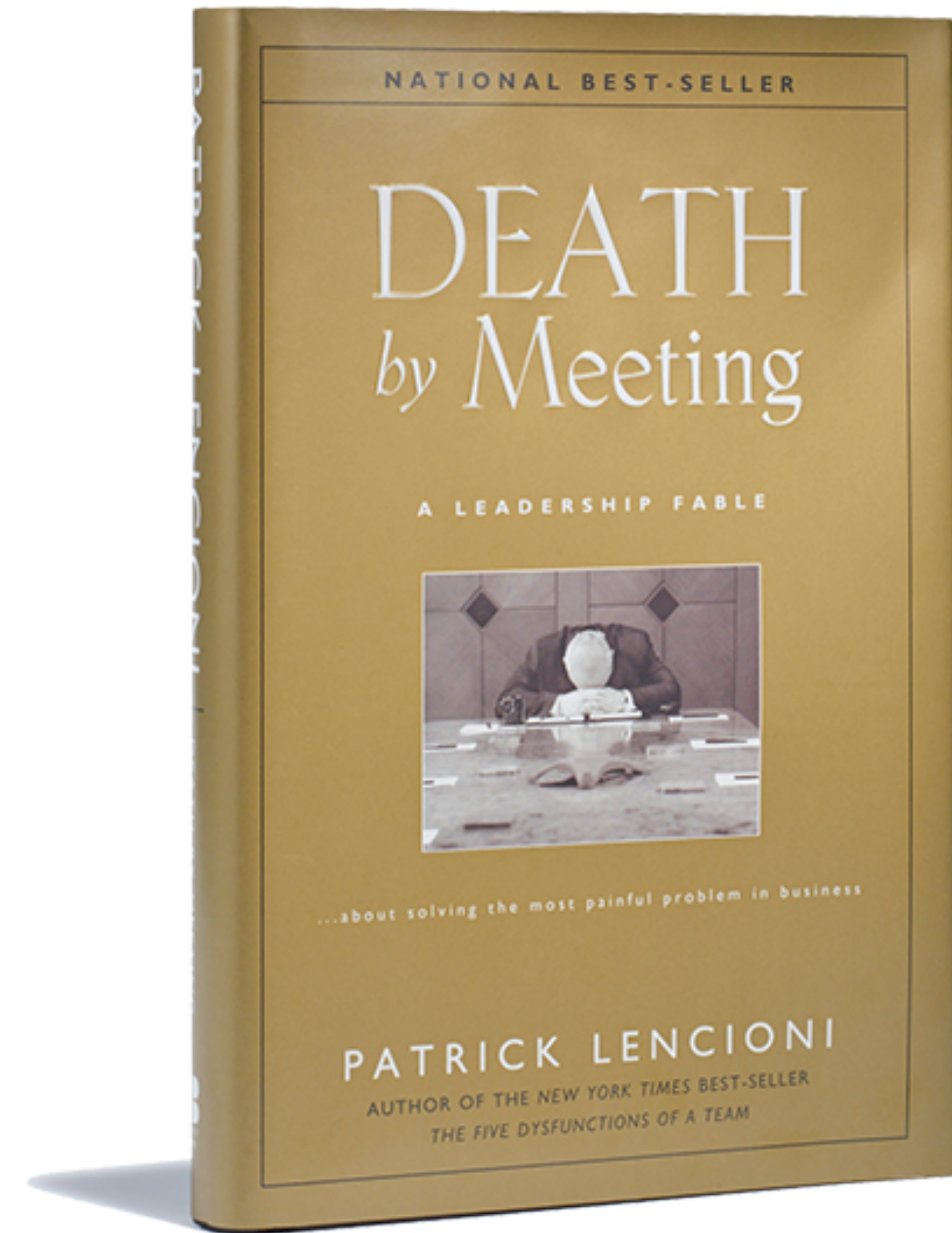
Drive consistency in getting things done and keeping everything on track.



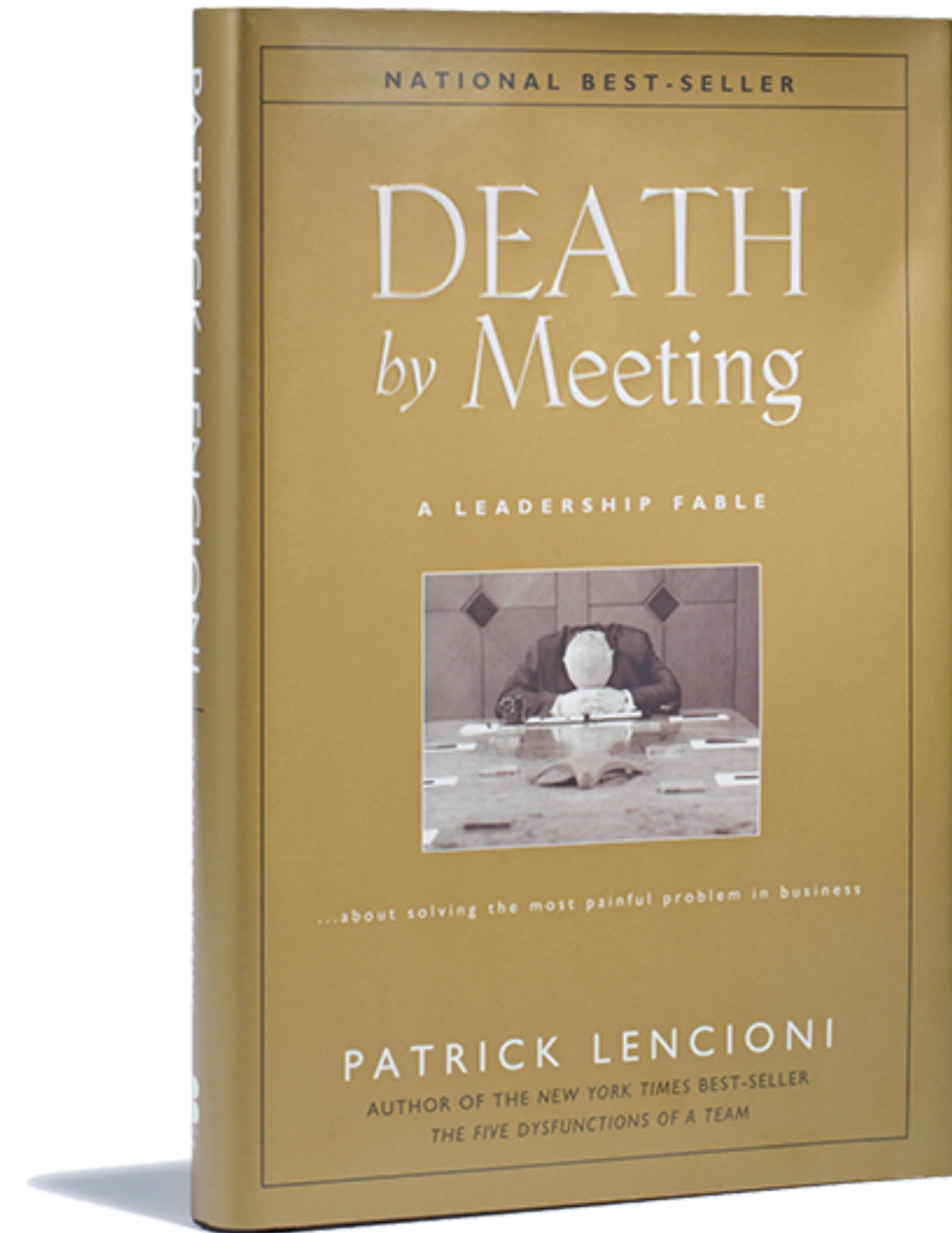
## FAST Rocks

Defeat The Whirlwind with measurable progress every 90 days.

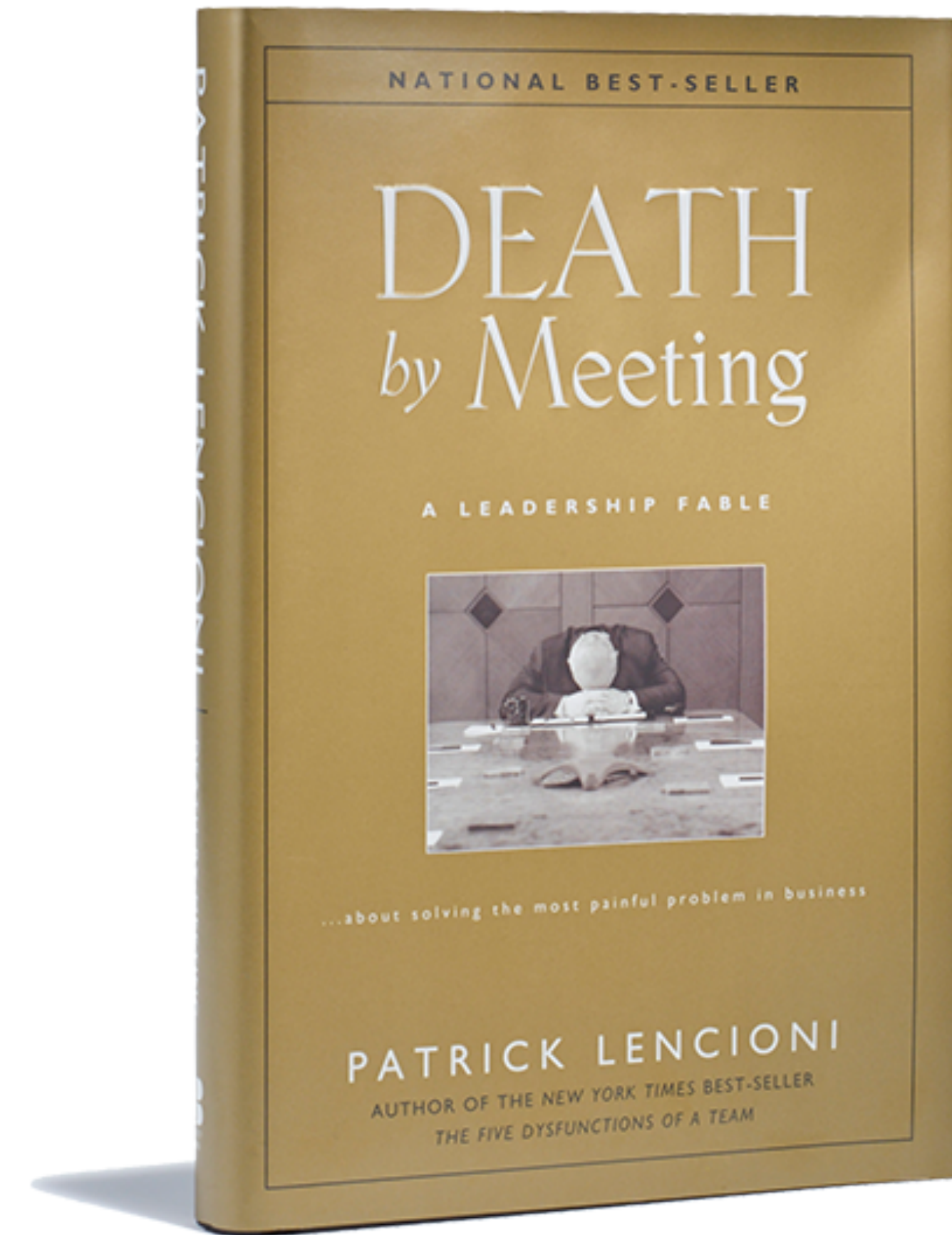
**“Whether we like it or not, meetings are the closest thing to an operating room, a playing field or stage we have. Yet most of us hate them. We complain about, try to avoid and long for the end of meetings, even when we are running the darn things!”**



**“How pathetic is it that we have come to accept that the activity most central to the running of organizations is inherently painful & unproductive?”**



**“It is at once shocking and understandable that intelligent people cannot see the correlation between failing to take the time to get clarity, closure, and buy-in during a meeting, and the time required to clean up after themselves as a result.”**



**“Meet well  
or make messes.  
The choice  
is yours.”**

**#yesijustquotedmyself**





WHETHER WE LIKE IT OR NOT, MEETINGS ARE THE CLOSEST THING TO AN OPERATING ROOM, A PLAYING FIELD OR STAGE WE HAVE.

## PINNACLE MEETING STRUCTURES

### ESSENTIAL MEETINGS

- Standup (Daily)
- Tactical (Weekly)
- Financial & Rock Accountability (Monthly)
- Strategic Lookout (Quarterly)
- Strategic Vision & Planning Summit (Annual)

### NEXT LEVEL MEETINGS

- Focused One Topic (As Required)
- Bivouac Break (Find Your Cadence)
- All Hands (Quarterly)
- Alignment at the Top (Find Your Cadence)
- Coaching Conversation (Quarterly)

## F.A.S.T. ROCK PLANNER

ROCK OWNER?

DUE DATE?

ROCK TITLE:

DESCRIBE THE ROCK AND IS IT FAST?

Why is this ROCK important?

### ROCK STEPS

BY DATE	ACTIVITY FOR ACHIEVING THE ROCK	DATE COMPLETED
	First Step <input type="checkbox"/>	
	Mid Step <input type="checkbox"/>	
	Mid Step <input type="checkbox"/>	
	Mid Step <input type="checkbox"/>	
	Final Step <input type="checkbox"/>	

### LIST RESOURCES NEEDED FOR COMPLETION

### ROCK CLIMBING TIPS

1. Start early by identifying any obstacles that need to be overcome and resources you need to complete your Rocks.
2. Set benchmarks and review them in your Weekly Meetings to ensure that you stay on track.
3. Work as a team, communicate often, hold ourselves and each other accountable and help each other stay on track.
4. Think about the obstacles & how to overcome them. Sprint at the beginning of the Quarter so you don't have to sprint at the end.
5. Are you being completely open and honest in your weekly Meetings about the progress you're making on your Rocks?  
And, are you willing to call out a peer if you sense that they're not really on-track ?

FREQUENTLY REVIEWED, AMBITIOUS, SPECIFIC, TRANSPARENT?

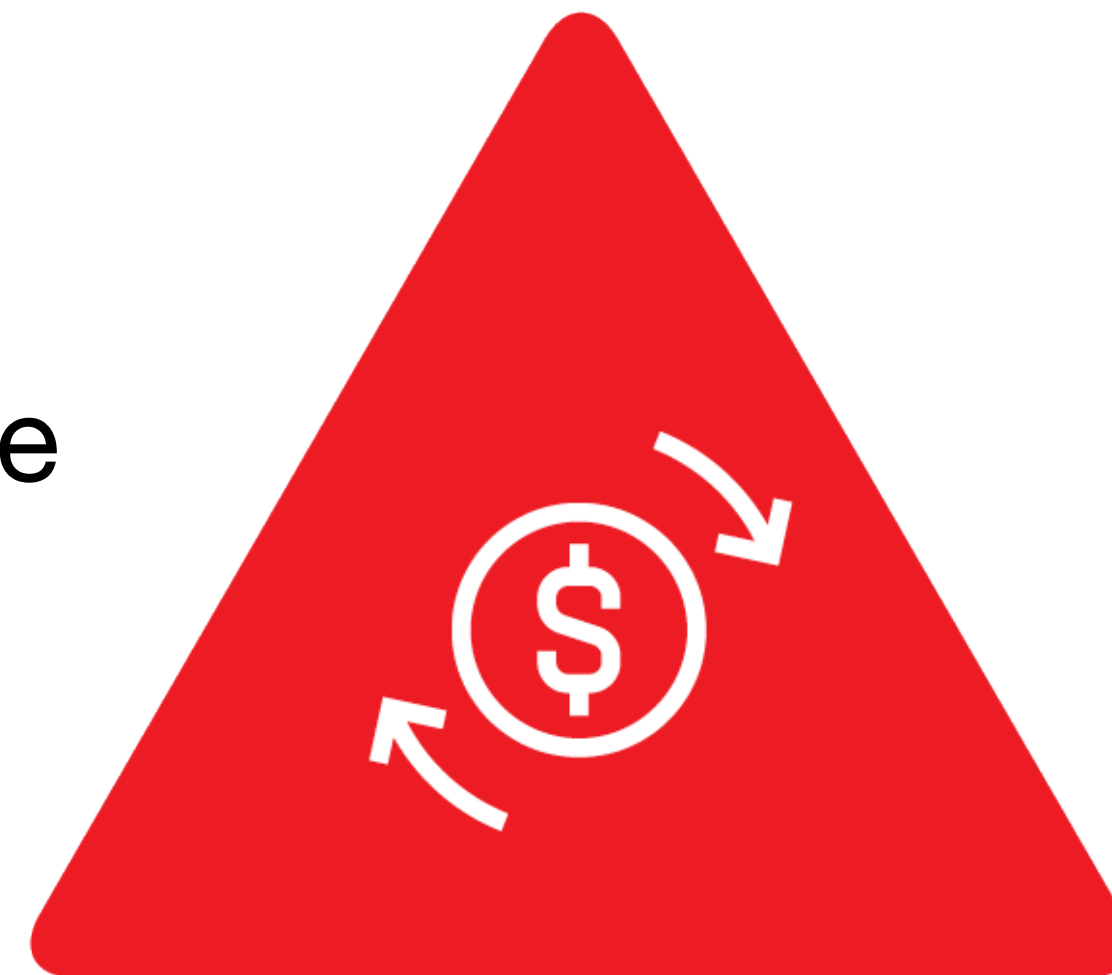
# Performance

**Win your week, and the quarters and year take care of themselves.**



## Scoreboard

Every single employee knows whether they won the week.



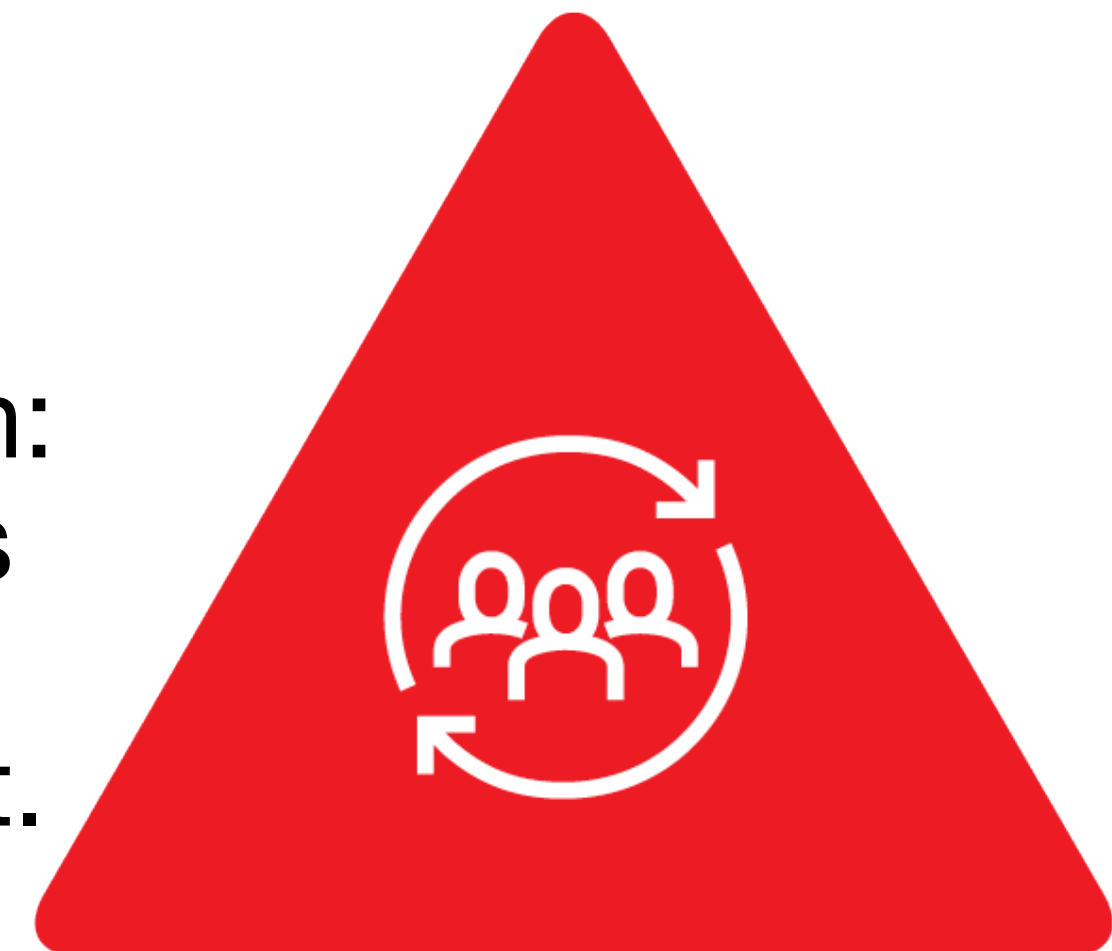
## The Power of One

Make 1% improvements in key areas, and pretty soon your own company will surprise & delight you.



## Profit First Discipline

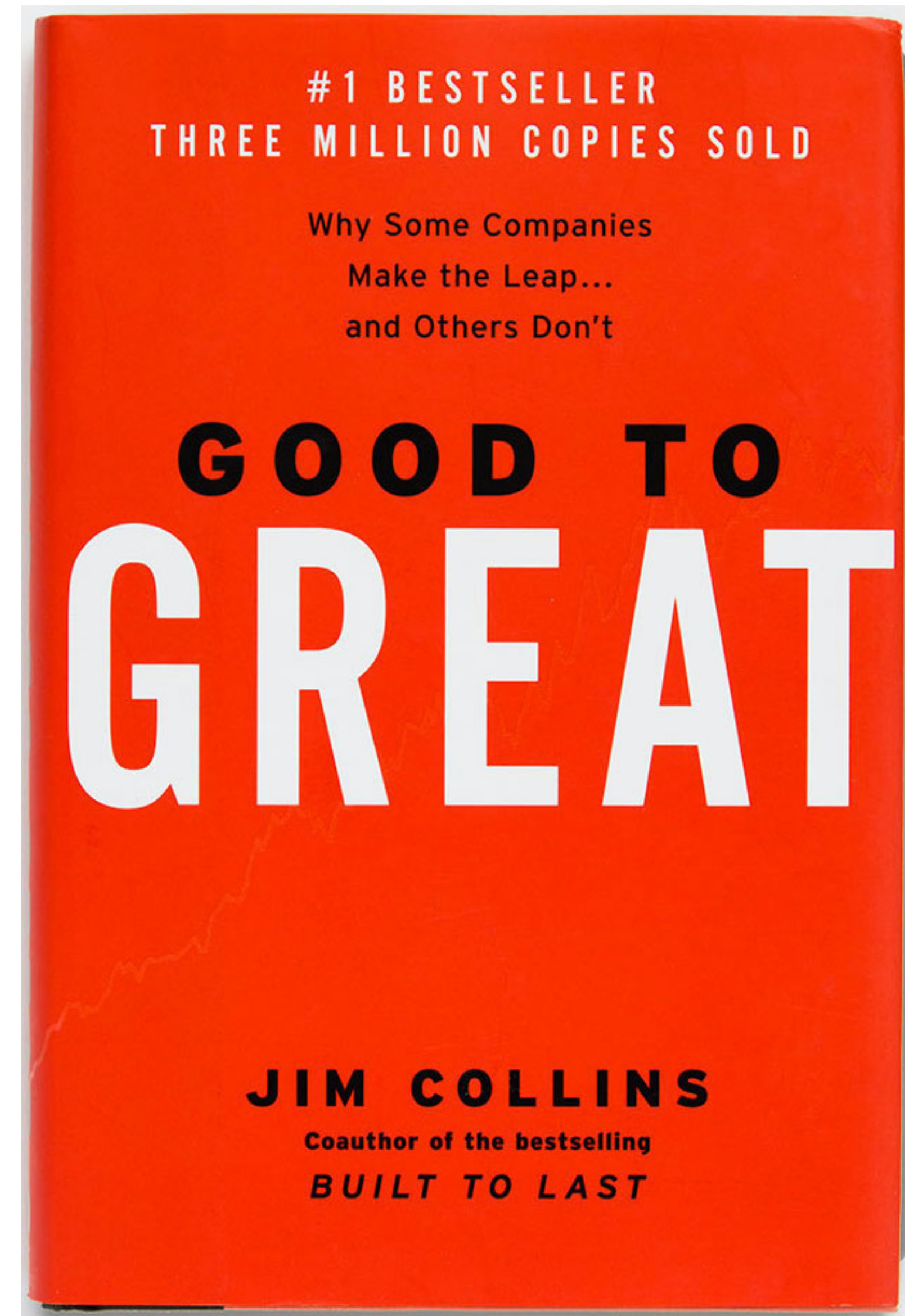
Change your approach:  
Sales-Profit=Expenses  
NOT  
Sales-Expenses=Profit.



## Flywheel

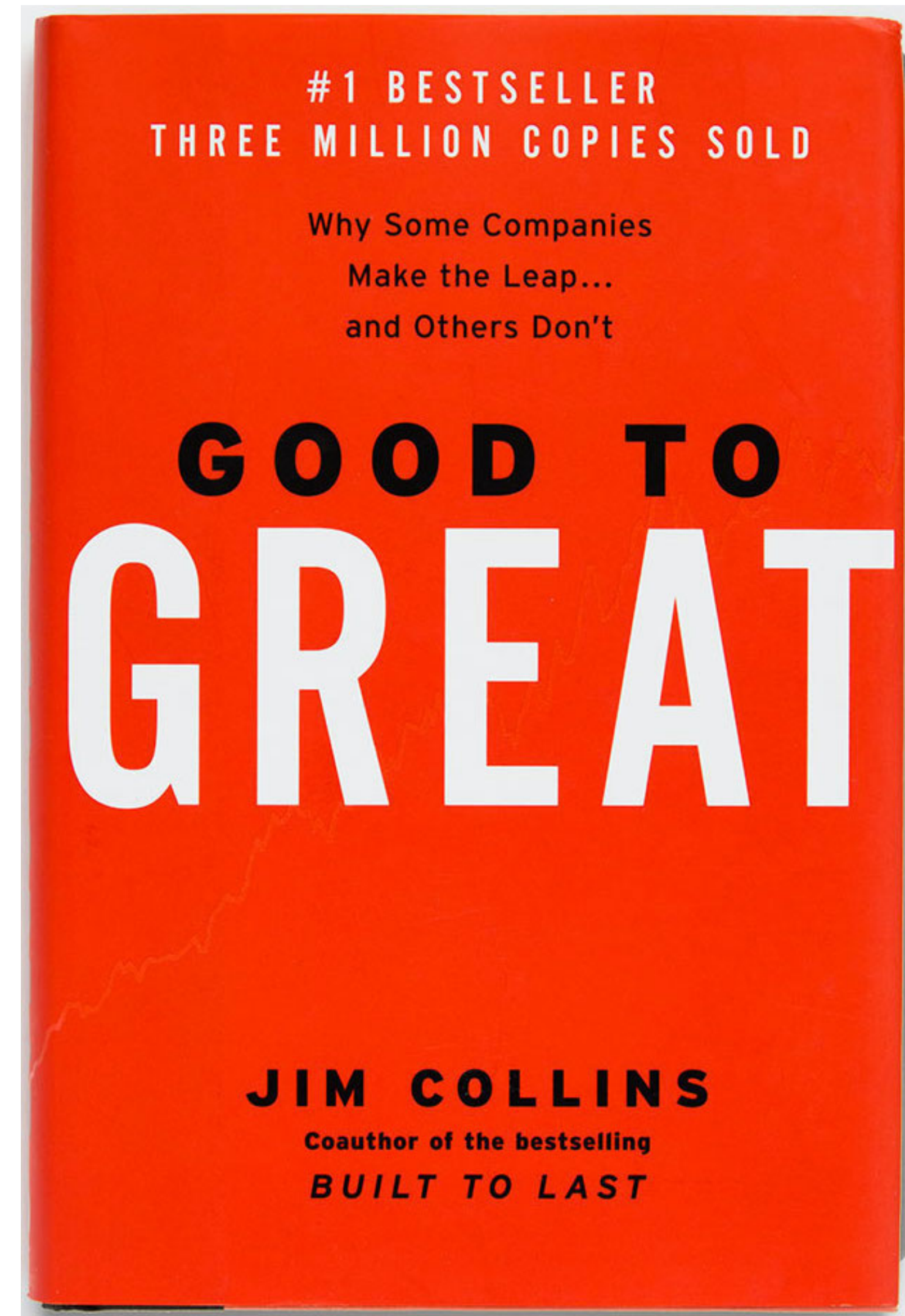
Keep momentum on your side. Make your company's key components better, faster, and cheaper, over and over again, until it's a cash machine that almost runs by itself.

**“In creating a good-to-great transformation, there’s no single defining action, no grand program, no single killer innovation, no solitary lucky break and no miracle moment. Instead, it feels like turning a giant, heavy flywheel  
...”**

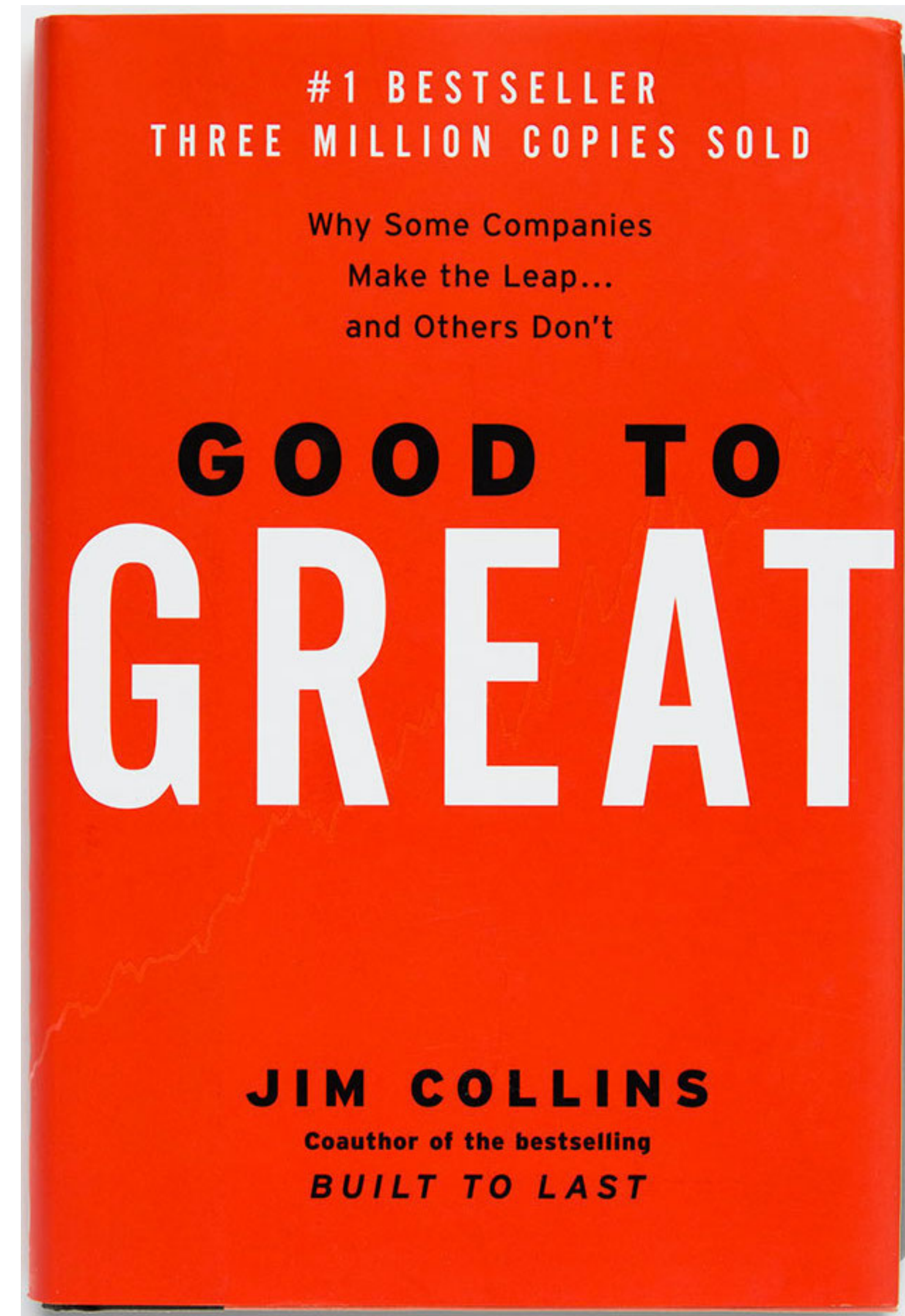




**“Pushing with great effort, you get the flywheel to inch forward. You keep pushing, and with persistent effort, you get the flywheel to complete one entire turn. You don’t stop. You keep pushing. The flywheel moves a bit faster ...”**



**“Two turns... then four... then eight... the flywheel builds momentum... sixteen... thirty-two... moving faster... a thousand... then ten thousand... a hundred thousand. Then, at some point, breakthrough! The flywheel flies forward with almost unstoppable momentum.”**



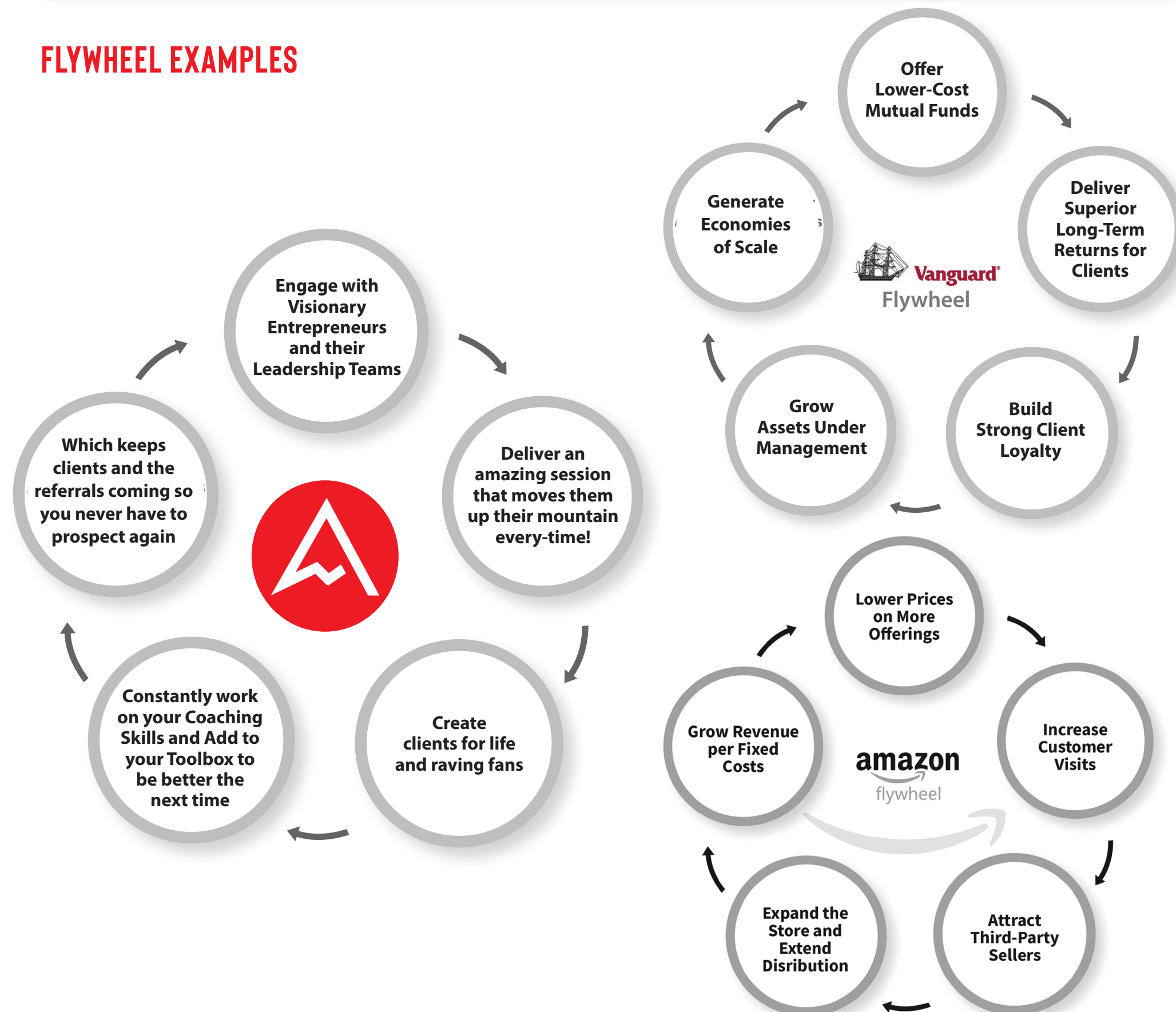
# INTRODUCTION

In creating a good-to-great transformation, there's no single defining action, no grand program, no single killer innovation, no solitary lucky break and no miracle moment. Instead, it feels like turning a giant, heavy flywheel. Pushing with great effort, you get the flywheel to inch forward. You keep pushing, and with persistent effort, you get the flywheel to complete one entire turn. You don't stop. You keep pushing. The flywheel moves a bit faster. Two turns... then four... then eight... the flywheel builds momentum... sixteen... thirty-two... moving faster... a thousand... then ten thousand... a hundred thousand. Then, at some point, breakthrough! The flywheel flies forward with almost unstoppable momentum.

Once you fully grasp how to create the flywheel momentum in your specific circumstance and apply that understanding with creativity and discipline, you get the power of strategic compounding. Each turn builds upon previous work as you make a series of good decisions, supremely well executed, that compound the impact of the rest. This is how you build greatness.

"The greatest danger in business and in life lies not in outright failure but in achieving success without understanding why you were successful in the first place." – Robert Burgelman, Stanford Graduate School of Business

## FLYWHEEL EXAMPLES



# WRITE YOUR 4-6 BIG STEPS

1

2

3

4

5

6

## DRAFT YOUR FLYWHEEL

Invent Great Products



Get Elite Athletes to Use Them



Inspire Weekend Warriors



Attract Mainstream Customers



Build Brand Power



Set High Prices and Channel Profits into R&D



Giro Flywheel



**THE PEOPLE ON TOP OF THE MOUNTAIN  
DIDN'T FALL THERE!**



**PINNACLE**  
BUSINESS GUIDES

**LET'S CLIMB**

# THE JOURNEY STARTS HERE

THE PINNACLE

3-5 YEAR MILESTONES

ANNUAL OVERNIGHT SUMMIT

QUARTERLY LOOKOUT

ANNUAL OVERNIGHT SUMMIT

QUARTERLY LOOKOUT

TWO DAY BASE CAMP





## BASE CAMP DAY ONE

### OBJECTIVES:

- ▲ Begin to envision a new bolder future
- ▲ Get started on WHO, WHY & WHERE
- ▲ Deploy Essential Business Tools

### AGENDA

1. **The Journey** – What’s ahead on the trail before arriving at the PINNACLE of your mountain?
2. **WHO First?**
  - a. Process Accountability Chart (Get Work, Do Work, Get Paid)
  - b. Talent Assessment
  - c. Functional Outcomes Accountability Chart
3. **Codified Culture**
  - a. Core Values – Did we get them right?
  - b. Do we know what good looks like?
  - c. Top 3 behaviors
4. **Assess the current Environment** with Trends, Weaknesses & Strengths
5. **Strength Test** our current Strategy
6. **The PINNACLE.** (#1 Goal)
7. **First Steps:** Set “Scramble” Rocks
8. **Meeting Structures** – Standup
9. **Next steps** and clear expectations agreed
10. **Head out** One team, clear goal, simplify, get to Base Camp Day Two

## MY JOURNEY



**JOHN FULWIDER**  
**PINNACLE GUIDE, FOUNDER**

### WHY DO COMPANIES CLIMB WITH ME?

- 1 They want to be in a **“Category of One”** in their industry.
- 18% Not just theory—18% average growth rate.
- 14 For over 14 years I’ve helped guide, teach, coach clients up their personal and business mountains.
- 100% 100% of them are convinced there is a **Next Level** for them and want my help to get there.
- 35+ I’ve spent my entire career helping over 35 companies reach for the PINNACLE.

