



# HOW TO BE A GREAT BOSS TOOLKIT

LEAD, MANAGE, AND CREATE ACCOUNTABILITY



# INTRODUCTION

Welcome to the journey to become a Great Boss! We're here to help you successfully reach your goal. To that end we've kept the 8 tools contained in this Toolkit as simple as possible. These tools are tried and proven. They are being successfully used by thousands of bosses who are employing EOS, the Entrepreneurial Operating System®, to get more of what they want from their businesses and from their personal lives. We encourage you to learn and master each of them.

*"We believe in keeping things as simple as possible because, as you've probably experienced, the journey to become a Great Boss is not easy. It requires patience, practice, and repetition. Lots of repetition. Stay the course. The rewards are great. You'll have more fun, feel more fulfilled and have time to enjoy doing what you do best."*

Use the tools consistently, and someday one of your direct reports will smile and say, "You're the best boss I've ever worked for!" When that happens, you'll know that you've made a difference in someone's life. You'll have earned the title "boss" and wear it with pride.



**GINO WICKMAN**



**RENÉ BOER**

# THE TOOLS

Use these time-tested tools that have worked for more than 30,000 bosses in every industry to improve your organization's performance, and your team's excitement about their work.

**01 - Delegate and Elevate™**

**02 - The People Analyzer™**

**03 - The Accountability Chart**

**04 - GWC™**

**05 - Clarity Break™**

**06 - The Leadership Self-Assessment**

**07 - The Management Self-Assessment**

**08 - The Annual Review**

# DELEGATE AND ELEVATE™

If you're like many bosses, you are frustrated by a lack of time to do your job well. The Delegate and Elevate tool helps you clarify and identify the activities that you must delegate to others in order to free up your time capacity to be a great boss.

Completing the Delegate and Elevate exercise also helps you discover whether you truly want to do boss-related activities focused on leading and managing people. This tool will put your true gifts in perspective so you can focus your energy and time on your strengths. After all, no one has the ability or time to do everything, and the sooner you delegate, the better your department will run.

**Step 1:** List all of the business-related activities that you do during the course of a day, week, and month. Write them down in a notebook. This list may take several hours to compile over a period of a week or longer, so do not rush it. Be patient and detailed.



For a complete list of boss-related activities to consider adding to your list, refer to Chapter 3 of *How to Be a Great Boss*.

**Step 2:** Next, turn to the Delegate and Elevate tool at the end of this section and place each activity into one of the four quadrants. Please be completely honest with yourself as you add them to the appropriate quadrant.

- **Quadrant 1** – “Love/Great” activities are those that you’ve mastered, that you love doing—that give you energy and a sense of fulfillment.
- **Quadrant 2** – “Like/Good” activities are those that you can do with minimal effort and that give you enjoyment and satisfaction.
- **Quadrant 3** – “Don’t Like/Good” activities are those that you are good at doing—you have to learn to do well through repetition and necessity but that don’t give you real satisfaction or a sense of fulfillment.
- **Quadrant 4** – “Don’t Like/Not Good” activities are most likely outside your area of expertise that leave you feeling inadequate and frustrated.

# DELEGATE AND ELEVATE™

Step 3: In the four quadrants, examine where you placed the activities that are boss-related and specific to dealing with direct reports (mark them with a highlighter to make this easier). A minimum of 80 percent of those boss-related activities should be in the top two quadrants.

If most of them are in the top two quadrants, you probably have what it takes (the capacity) to be a great boss. If not, you may find more satisfaction and fulfillment in applying your expertise and technical skill in a role that doesn't require you to lead and manage others.

**Step 4:** If you cannot accomplish all of the business activities you listed in the time you have, then you have a time-capacity issue. You need to “delegate and elevate” the activities in the bottom two quadrants that are occupying too much of your time.



For more guidance on how to delegate and elevate to be a more effective leader in your organization, read Chapter 3 of *How to Be a Great Boss*.

# DELEGATE AND ELEVATE™

**Love/Great**

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**Like/Good**

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**Don't Like/Good**

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**Don't Like/Not Good**

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# THE PEOPLE ANALYZER™

If you have clearly defined your Core Values, you can determine if someone is a Right Person for your organization by using a simple tool called The People Analyzer.

Begin by listing the people on your team down the left-hand column, and your Core Values across the top row. Next, rate each person based on how well they live (or don't live) by each Core Value. Base your ratings on personal observations of their behavior. In addition, take into account feedback from your peers. For each Core Value, you will give each person one of three ratings - plus, plus/minus, or minus. This is the definition for each:

- **Plus (+)** means that they live the Core Value “most of the time.” No one is perfect.
- **Plus/Minus (+/-)** means that “sometimes they do, and sometimes they don’t” live the Core Value. They’re hot and cold.
- **Minus (-)** means that “most of the time” they do not live that Core Value.

To create a useful assessment, you must be completely honest with yourself when evaluating your people. Trust your gut. In the process, you’re creating awareness and exploring issues. After you evaluate everyone using The People Analyzer, you’ll have a clear picture of who is living the Core Values.



For more guidance on how to surround yourself with great people, read Chapter 4 of *How to Be a Great Boss*.

# THE PEOPLE ANALYZER™

**NAME**

|                |  |  |  |  |  |  |  |  |  |
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| <b>The Bar</b> |  |  |  |  |  |  |  |  |  |

**Rating: + +/- -**

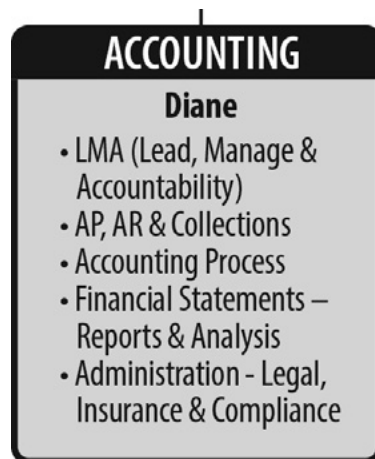


# THE ACCOUNTABILITY CHART

A “seat” is a function that reports to you as the boss. What makes it a seat is that you have defined exactly what you expect of the person who is going to fill it. Each seat has about five Major Roles and Responsibilities that summarize at a high level the accountability or job description for that seat.

To define a seat, list its five Major Roles and Responsibilities. Keep them simple, not a laundry list of activities; in this case, less is more. This will clarify expectations for the person sitting in that seat. Next, you must give the seat a name (Title). Again, a seat is simply a function, with its name and its five Major Roles and Responsibilities defined.

Here’s an example of a seat for an accounting function and its five Major Roles and Responsibilities:



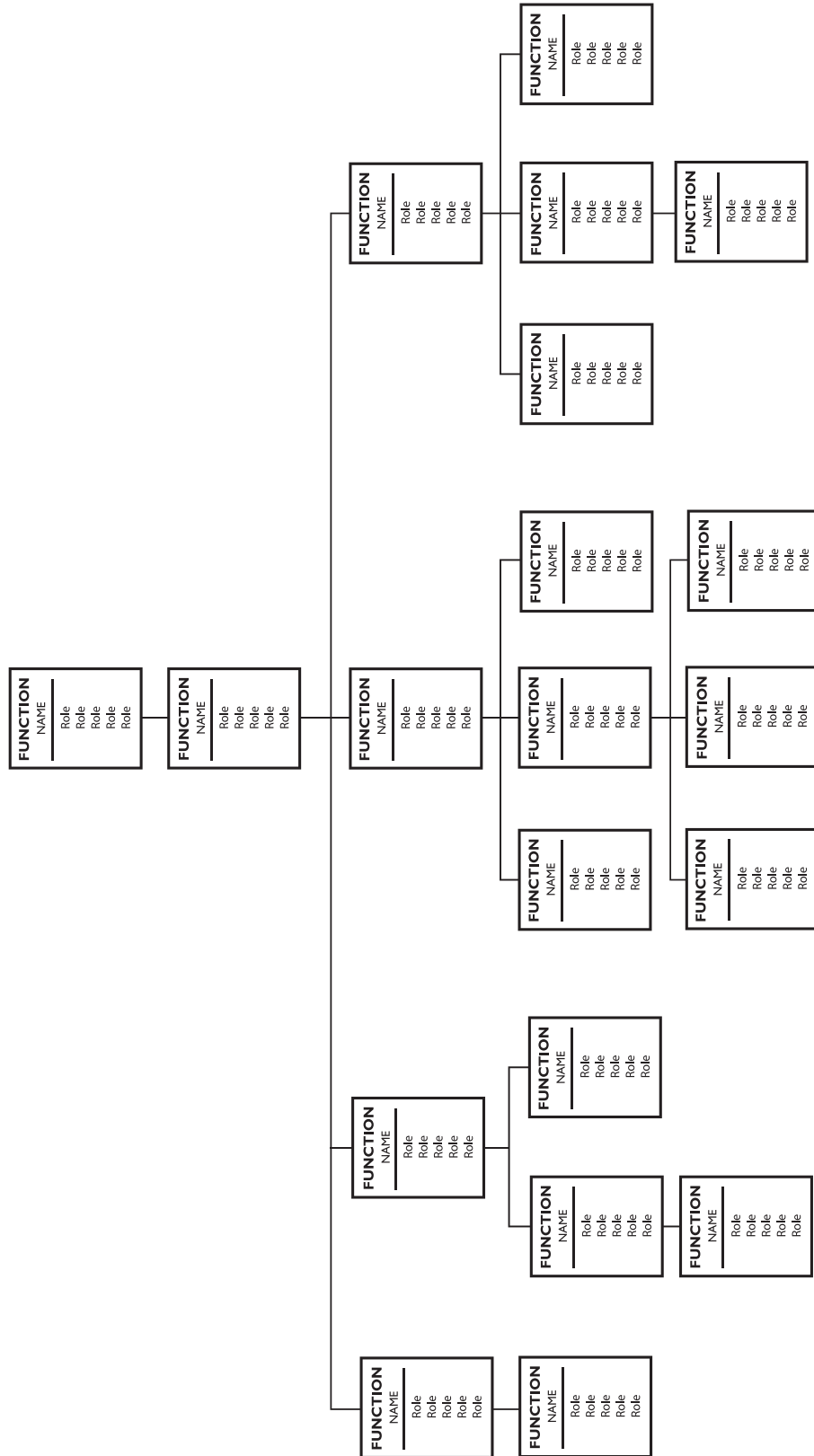
Determine all of the seats reporting to you that are critical to your department’s or organization’s functionality and growth—not necessarily what it looks like today, but rather what it must look like over the next six to twelve months to meet your goals.

The objective here is to create absolute clarity for each direct report about where they should focus their activities and what their most important responsibilities are. Also consider adding any activities that you need to delegate to free up time for yourself.



For more guidance on defining the Right Seats in your organization to surround yourself with great people, read Chapter 4 of *How to Be a Great Boss*.

# THE ACCOUNTABILITY CHART



# GWC™

With all of your seats defined, you are now ready to assess whether or not all of your people are in the Right Seat. Do they get it, want it, and have the capacity to do that job (GWC for short)? Answer either yes or no for “G, W and C.” There are no maybes.

Now go back to The People Analyzer, and add GWC to the top row next to Core Values, and fill in your answers like this:

| THE PEOPLE ANALYZER™ |            |             |                     |                    |                 |        |         |                   |  |
|----------------------|------------|-------------|---------------------|--------------------|-----------------|--------|---------|-------------------|--|
| Name                 | Help First | Grow or Die | Be Humbly Confident | Do the Right Thing | Do What You Say | Get it | Want it | Capacity to Do It |  |
| Herb                 | +/-        | +           | +                   | +                  | +               | Y      | Y       | N                 |  |
| Rita                 | +/-        | +/-         | -                   | -                  | +               | Y      | Y       | Y                 |  |
| Curt                 | -          | -           | +                   | +/-                | +/-             | Y      | N       | Y                 |  |
| Diane                | +          | +           | +                   | +                  | +               | Y      | Y       | Y                 |  |



For more guidance on assessing whether you have the Right People in the Right Seats in your organization, read Chapter 4 of *How to Be a Great Boss*.

## Are each of your people in the right seat?

If they are not, you will be frustrated, they will be frustrated, and, as a result, you will never be able to completely delegate and elevate. You will always be forced to do their work and will not be able to let go of the vine.

|                  |
|------------------|
| Function<br>Name |
| • _____          |
| • _____          |
| • _____          |
| • _____          |
| • _____          |

In order for someone to be in the right seat, to step up, and to ultimately fill the opening you have created, he or she must get it, want it, and have the capacity to do the job. If any one of the three is a “no,” it is never going to happen ... 99.9 percent of the time.

### Do they:

#### Get it?

Y      N  
     

- Do all of the neurons in his or her brain connect when you explain and they do the job?
- Does he or she get all of the ins and outs of the position?
- Not everyone gets it, and it's not a bad thing. He or she just needs to be in a different seat.

#### Want it?

- Does he or she genuinely want to do the job?
- Does he or she get up every morning wanting to do it?
- You can't pay, motivate, force, or beg him or her to want it. He or she has to want it on his or her own.
- Sometimes people get it and have the capacity, but just don't want it anymore.

#### Capacity?

- Does he or she have the mental, physical, spiritual, time, knowledge and emotional capacity to do the job?
- Sometimes this one is negotiable. While not getting it or wanting it are deal-killers, a problem of capacity can be solved, although rarely. If you believe the person can gain the capacity and you are willing to invest the time, resources, and energy for him or her to do so, do it. It is just that most growing organizations don't have the luxury of waiting one to three years for someone to gain the capacity and need the seat filled completely now.

# CLARITY BREAK™

One discipline that all great leaders have in common is that they take time on a regular basis to rise above the everyday demands of their jobs to reflect and think from the thirty-thousand-foot level.

To stay sharp, confident, and at your best for your people, you must take Clarity Breaks. By definition, a Clarity Break is time you schedule **away from the office**, out of the daily grind of running the department, to think and to work on your business, department, or self.

Stepping back to think will create clarity for you and restore your confidence. This is important because the normal course of day-to-day business pulls you deeper and deeper into the minutiae of your work. As a result, you sometimes can't see the forest for the trees. You start to feel overwhelmed and you become short with your people.

## **Make the time to save time.**

Therefore, at intervals, you must elevate yourself above the day-to-day activities “in” the business so you can work “on” the business. Schedule an appointment with yourself. Put it down on your calendar. If you don't schedule the time, it will never magically happen. At first you may be concerned about when you'll find the time. The irony is, you'll actually save time by taking Clarity Breaks. When you are clear about your bigger objectives, you gain the confidence to simplify procedures and create efficiencies.

## **Minimize distractions and allow yourself to just think.**

Use this scheduled break wisely, though. This is not time to catch up on email or complete a to-do list. It's time to think, to see things clearly and restore your confidence.

Faced with a blank legal pad or journal, with no agenda, no interruptions or distractions, you'll be challenged at first to actually think.

Use the Clarity Break questions on the next page to get started.

# CLARITY BREAK™

## Clarity Break Questions

Is the Vision and Plan for the business/ department on track?

What is the number one goal?

Am I focusing on the most important things?

Do I have the Right People in the Right Seats to grow?

What is the one “people move” that I must make this quarter?

How strong is my bench?

If I lose a key player, do I have someone ready to fill the seat?

Are my processes working well?

What seems overly complicated that must be simplified?

Do I understand what my direct reports truly love to do and are great at doing?

Am I leveraging their strengths?

What can I delegate to others in order to use my time more effectively?

What can we do to be more proactive versus being reactive?

What can I do to improve communication?

What’s my top priority this week? This month?

# THE LEADERSHIP SELF-ASSESSMENT

As a boss, you must provide your direct reports with effective leadership. Remember what President Eisenhower said: "The essence of leadership is to get others to do something because they think you want it done and because they think it is worthwhile doing."

## The Five Leadership Practices™

- **Practice 1.** Giving clear direction
- **Practice 2.** Providing the necessary tools
- **Practice 3.** Letting go of the vine
- **Practice 4.** Acting with the greater good in mind
- **Practice 5.** Taking Clarity Breaks™

This one-page leadership self-assessment will let you do a quick check-up on yourself to determine where you need improvement. Thinking about all of the people that report directly to you (people who call you their "boss"), answer each statement with a Yes or No. To answer Yes, you must be doing the practice consistently with ALL of your direct reports. If not, you must answer No.

## After Completing The Leadership Self-Assessment

If you've answered the self-assessment questions honestly, you probably have one or more No's. This exercise is not trying to make you feel guilty or inadequate. Rather, it is intended to show you the areas that need improvement so you can become a great boss.

**STEP 1:** Schedule a date on your calendar for when you will be able to answer Yes to all of your No's. The norm is six months from today.

**STEP 2:** Schedule a date, time, and place on your calendar to take your next Clarity Break. Right now. How do you become a great leader? By giving clear direction, providing the necessary tools, letting go of the vine, acting with the greater good in mind, and taking Clarity Breaks, you will become a great leader.

# LEADERSHIP

Y N

## I am giving clear direction

- Creating the opening
- A compelling vision
- V/TO™

## I am providing the necessary tools

- Resources
- Training
- Technology
- People
- Time and attention

## I am letting go of the vine

- Delegate and Elevate™
- GWC™

## I act with the greater good in mind

- Company vision (V/TO™)
- My actions
- My decisions
- Walk the talk
- Company needs first

## I am taking Clarity Breaks™

- “On” the business
- Creating clarity
- Protecting my confidence
- Daily, weekly, or monthly
- Blank legal pad



# THE MANAGEMENT SELF-ASSESSMENT

Management boils down to five basic practices. To the degree you do them well, “accountability” will be the byproduct. You’ll get everything you want out of your people without making them feeling “managed.”

## The Five Management Practices™

- **Practice 1.** Keeping expectations clear
- **Practice 2.** Communicating well
- **Practice 3.** Maintaining the right Meeting Pulse™
- **Practice 4.** Having Quarterly Conversations™
- **Practice 5.** Rewarding and recognizing

This one-page management self-assessment will let you do a quick check-up on yourself to determine where you need improvement. Thinking about all of the people who report directly to you (people who call you their "boss"), answer each statement with a Yes or No. To answer Yes, you must be doing the practice consistently with ALL of your direct reports. If not, you must answer No.

## After Completing The Management Self-Assessment

If you’ve answered honestly, you probably have one or more No’s. Again, this exercise is not intended to make you feel guilty or inadequate, but to show you the areas that need improvement to become a great boss.

**STEP 1:** Just as with The Five Leadership Practices, put a stake in the ground for when you will be great. Schedule a date on your calendar when you will be able to answer Yes to all of questions on the self-assessment. The norm is six months from today.

**STEP 2:** Review this management self-assessment one on one with each direct report immediately. Ask them how you are doing with each of the five practices. This will help you hear the truth, lead to a great dialogue, and make you a better manager.

# MANAGEMENT

## When managing my direct reports:

|  | Y                        | N                        |
|--|--------------------------|--------------------------|
| <b>I keep expectations clear</b>   | <input type="checkbox"/> | <input type="checkbox"/> |
| <ul style="list-style-type: none"><li>• Mine and theirs</li><li>• Roles, core values, rocks, and measurables</li></ul>   |                          |                          |
| <b>I am communicating well</b>   | <input type="checkbox"/> | <input type="checkbox"/> |
| <ul style="list-style-type: none"><li>• Me and them</li><li>• You know what is on each other's mind (no assumptions)</li><li>• 2 emotions</li><li>• Question-to-statement ratio</li></ul>  |                          |                          |
| <b>I have the right Meeting Pulse</b>  | <input type="checkbox"/> | <input type="checkbox"/> |
| <ul style="list-style-type: none"><li>• Even exchange of dialogue</li><li>• Reporting measurables</li><li>• Keeping the circles connected</li></ul>  |                          |                          |
| <b>I am doing quarterly one-on-ones</b>  | <input type="checkbox"/> | <input type="checkbox"/> |
| <ul style="list-style-type: none"><li>• The 5-5-5™</li><li>• The People Analyzer™ (core values and GWC™)</li></ul>   |                          |                          |
| <b>I am rewarding and recognizing</b>  | <input type="checkbox"/> | <input type="checkbox"/> |
| <ul style="list-style-type: none"><li>• Give positive and negative feedback quickly (24 hours)</li><li>• Criticize in private, praise in public</li><li>• Be their boss, not their buddy</li><li>• The three-strike rule</li></ul> |                          |                          |

# THE ANNUAL REVIEW

Most companies employ performance reviews to give feedback to subordinates on an annual basis, usually tied to a pay increase. The boss scrambles at the last minute (after repeated emails from HR to get the reviews completed and the forms turned in) to use a rating scale of 1 to 5, where 5 means “excellent” and 1 means “needs immediate improvement.” Most bosses avoid rating anyone as a 5 because they’ll be challenged by their boss or the HR department for being too easy. They avoid rating anyone a 1 because that might (1) lead to conflict and (2) require them to take corrective action, which usually involves a long paper trail of verbal and written warnings.

Even more counterproductive, most bosses believe (or are told by their bosses) that giving anyone an excellent rating implies that there is no room for improvement. They’re confusing excellence with perfection. Imagine how disheartening this is for people most deserving of an excellent rating. When told that a rating of 5 is impossible, what are they supposed to do? Work harder? Not likely. What usually happens is because they feel unappreciated, they become resentful, disengaged, and motivated to look for another place to work where performance and skills are rewarded and recognized.

Instead, we recommend engaging in Quarterly Conversations (discussed thoroughly in Chapter 8 of *How to Be a Great Boss*), in addition to scheduling an open and honest Annual Review session with each of your direct reports.

Using the Annual Review form on the next page, you’ll be able to share your honest assessment of your direct reports’ fit with both your organization and their position within it. You’ll also reflect on their accomplishments, opportunities for growth and improvement, and establish clear expectations for next steps.



For a thorough explanation of how to hold effective Quarterly Conversations and Annual Reviews, refer to Chapter 8 of *How to Be a Great Boss*.





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