

How to Automate Your Organization

Kathi Roetter



Leading with Clarity and Efficiency



Can you as the leader of your organization step away and trust that the things will still operate efficiently without you?

Learning from the EOS System



EOS System - Entrepreneurial
Operating System

Learning from the EOS System



People are drawn to EOS because:

1. Lack of Control
2. People
3. Profit
4. The Ceiling
5. Things aren't working

Start with the Vision



Vision describes some achievement or future state that the organization wants to accomplish. ***A vision has to be shared in order to do what it's meant to do – which is to inspire, clarify, and focus the work.***

Reflection

How do you ensure that your team - staff, volunteers, board is clear on the vision of your organization?

Add in Values



Values are a small set up vital and timeless guiding principles for your organization.

What are your organization's values?

**Example-
Troy
Chamber of
Commerce**

Our Values:

- Exceed Expectations
- Be fully Immersed
- Be Inclusive
- Be Innovative
- Lead with Integrity

The Right People



The right people are the one's that fit your organizations core values.

The Right People



Hire, Train and Evaluate using your organizational values.

The Right People



Put the right people in the right seats and then watch them thrive. When your people thrive, the organization thrives.

People Analyzer



The People Analyzer provides a tool to analyze staff based on the organizations core values.

[EOS People Analyzer](#)

Processes: Leading the Way



Documenting Each of the Core Processes for your organization.

**Why Are
Business
Processes
Important**



What processes do you have in place that are allowing your organization to work efficiently?

Are there processes that you may not have been consciously aware of that are driving your organization?

Reflection

**Systems &
Processes =
Organizational
Success**



Document the 20 percent that produce 80 percent of the results.

Think high level.

80/20 Rule

Process Component



- Identify your Core Processes
- Document and simplify them
- Package them into one source

- Create a “circle of life” model
- Train EVERYONE
- Manage people to follow the core processes

Areas where you might want to create processes:

- HR - onboarding an employee
- Board - onboarding new board members
- Fundraising - selling sponsorships


[Member Retention Plan](#)

Example

Reflection

What benefits could you see from putting processes and systems in place?

Automation Assists with Decision Making



The only reason you have a problem is that you haven't made a decision.

Clarity of vision, Focus, Values and Processes gets everyone on the same team and working to move the organization forward.



Effective leadership is putting
first things first. Effective
management is discipline,
carrying it out.

Stephen Covey