



# **GREAT COMPANIES WIN BY BUILDING CHAMPIONSHIP TEAMS**

**Unleash the Potential of Your Company**  
Jon Chen

# THREE FUNDAMENTALS FOR BUILDING A CHAMPIONSHIPS TEAM



01

Create a playbook to drive alignment

02

Create a culture that unleashes the power of your people

03

Unleash the power of love in your organization



# **A PLAYBOOK TO DRIVE ALIGNMENT**



# SYSTEM

DESIGN





# SYSTEM

DESIGN

CADENCE



# SYSTEM

**DESIGN**

---

**CADENCE**

---

**SCORECARD**

---



# SYSTEM

# SOUL

DESIGN

DESTINATION

CADENCE

SCORECARD





# SYSTEM

# SOUL

**DESIGN**

---

**DESTINATION**

---

**CADENCE**

---

**IDENTITY/ETHOS**

---

**SCORE**

---



# SYSTEM

# SOUL

**DESIGN**

**DESTINATION**

**CADENCE**

**IDENTITY/ETHOS**

**SCORE**

**PEOPLE**



# Huddle





**A CULTURE THAT  
UNLEASHES THE  
POWER OF YOUR  
PEOPLE**





# Huddle





**UNLEASH THE  
POWER OF LOVE**



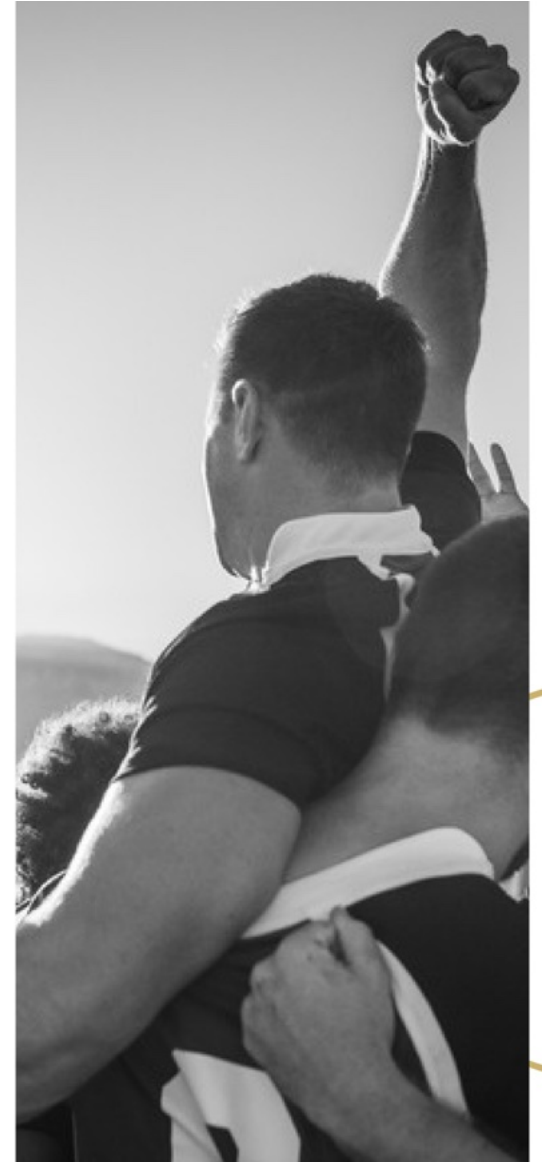




# Huddle



**3 SOCCER SEASONS  
FROM NOW, WHAT HAS  
TO HAPPEN  
PROFESSIONALLY AND  
PERSONALLY?**





The background is a blurred photograph of a soccer field. In the foreground, a soccer ball is visible on the left. In the background, several players are silhouetted against a bright sky, and a goalpost is visible. The overall tone is blue and monochromatic.

**GREAT COMPANIES WIN BY  
BUILDING CHAMPIONSHIP TEAMS**

# HOW HEALTHY IS YOUR **TEAM?**

Let's find out!



**SCAN ME!**

# SYSTEMS

# SOUL

**DESIGN**

**DESTINATION**

**CADENCE**

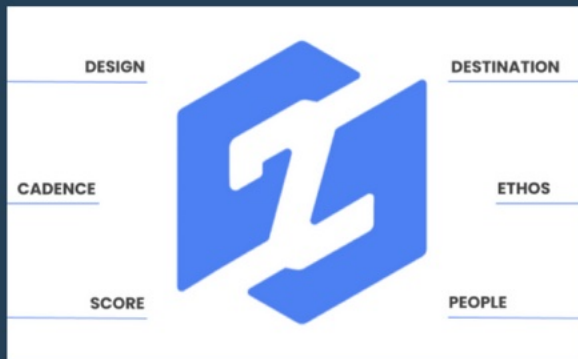
**IDENTITY/ETHOS**

**SCORECARD**

**PEOPLE**



# SYSTEM & SOUL VS OTHER OPERATING SYSTEMS



**PEOPLE FIRST**

**FLEXIBLE**

**EXPERIENCE**





**THE CHAOS WE EXPERIENCED  
BEFORE WE STARTED – IS GONE.  
OUR LEADERSHIP TEAM IS MORE  
ALIGNED THAN EVER.**

**JACOB MAYNARD, CEO, J2 CONSTRUCTION**



# TODAY'S PRACTICE



**01**

Outline a playbook to drive alignment for your team

**02**

Outline a culture that unlocks the potential of your people

**03**

Begin to unleash the power of love in your organization



# **A PLAYBOOK TO DRIVE ALIGNMENT**





**I WISH MY TEAM WERE  
ON THE SAME PAGE...**

**- EVERY CEO**



# S2 ROAD MAP

ONLINESS  
STATEMENT

We are the only \_\_\_\_\_  
that \_\_\_\_\_  
\_\_\_\_\_

DESTINATION

We are going \_\_\_\_\_  
by \_\_\_\_\_  
because \_\_\_\_\_

CULTURAL  
ENGINEERING

VALUES

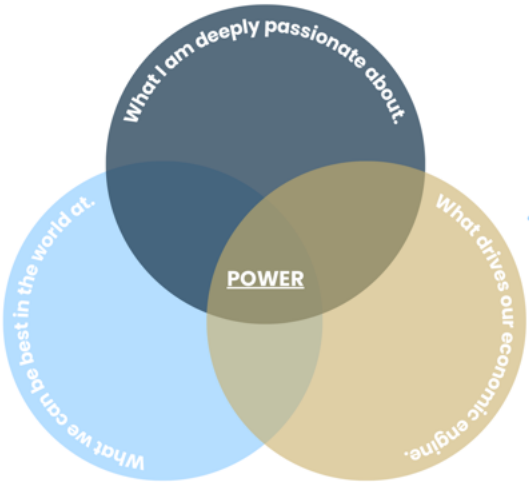


ORG HABITS



CULTURE

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



HEDGEHOG

BETS

OUR BETS					
3-YEAR DIRECTION		1-YEAR FOCUS		QUARTERLY OBJECTIVES	
Date:	_____	Date:	_____	Date:	_____
R:	_____	R:	_____	R:	_____
P:	_____	P:	_____	P:	_____
EE:	_____	EE:	_____	EE:	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

QUARTERLY  
OBJECTIVES

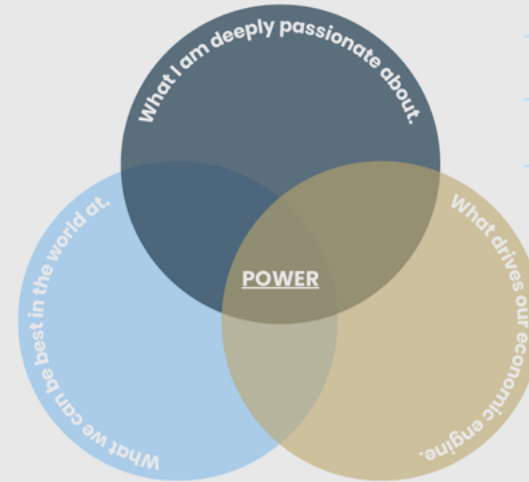
# S2 ROAD MAP

ONLINESS  
STATEMENT

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that \_\_\_\_\_  
\_\_\_\_\_

DESTINATION

We are going \_\_\_\_\_  
by \_\_\_\_\_  
because \_\_\_\_\_



SYSTEMS

SOUL



DESTINATION

IDENTITY/ETHOS

HEDGEHOG

CULTURAL  
ENGINEERING

VALUES



ORG HABITS



CULTURE

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

OUR BETS

3-YEAR DIRECTION

1-YEAR FOCUS

QUARTERLY OBJECTIVES

BETS

Date:		Date:		Date:	
R:	_____	R:	_____	R:	_____
P:	_____	P:	_____	P:	_____
EE:	_____	EE:	_____	EE:	_____
	_____		_____		_____
	_____		_____		_____

QUARTERLY  
OBJECTIVES

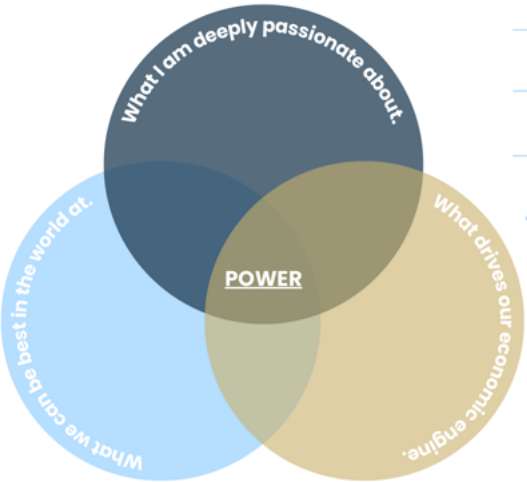
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ONLINESS  
STATEMENT

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\_\_\_\_\_

DESTINATION

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by \_\_\_\_\_  
because \_\_\_\_\_



HEDGEHOG

CULTURAL  
ENGINEERING

VALUES



ORG HABITS



CULTURE

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

BETS

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EE:	_____	EE:	_____	EE:	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

QUARTERLY  
OBJECTIVES

# S2 ROAD MAP

ONLINESS  
STATEMENT

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\_\_\_\_\_

DESTINATION

We are going \_\_\_\_\_  
by \_\_\_\_\_  
because \_\_\_\_\_

CULTURAL  
ENGINEERING

VALUES

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



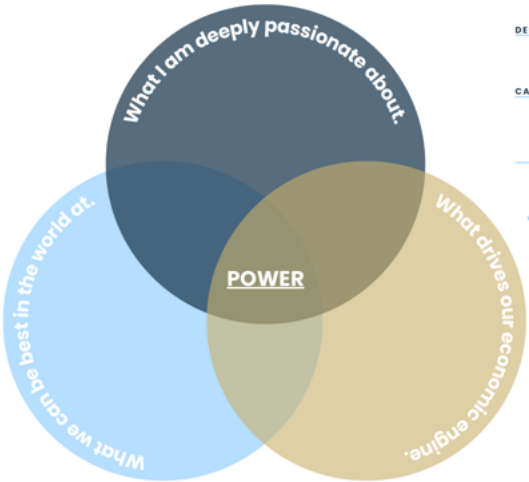
ORG HABITS

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



CULTURE

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



SYSTEMS

SOUL

DESIGN

CADENCE



HEDGEHOG

BETS

OUR BETS					
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Date:		Date:		Date:	
R:		R:		R:	
P:		P:		P:	
EE:		EE:		EE:	

QUARTERLY  
OBJECTIVES



# S2 ROAD MAP

## ONLINESS STATEMENT

We are the only home services company  
that will deliver on the promise of the comfort  
in your home, or you don't pay

## DESTINATION

We are going reach \$49mm in gross revenue  
by 2030

because we believe the growth of our company fulfills the dream  
of our people and helps us to bring more comfort to the  
members of our community.

## CULTURAL ENGINEERING

### VALUES

your family is our priority  
your confidence is our purpose  
your problem is our problem



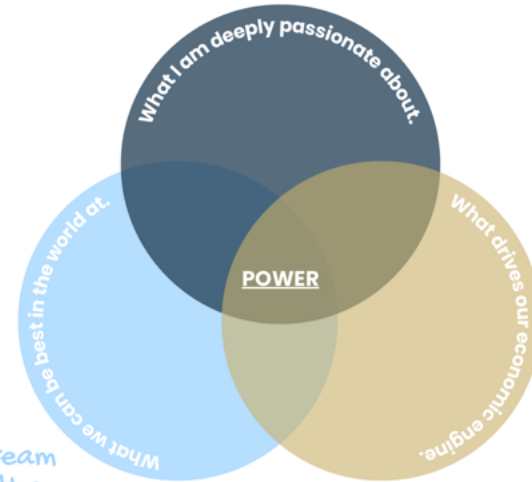
### ORG HABITS

treat people like family  
work hard to earn trust  
we feel others pain  
transparent  
ambitious



### CULTURE

loyalty  
caring  
challenged to grow  
high standards  
genuine



## HEDGEHOG

## BETS

Date: 12/31/2026  
R: \$28.8M  
P: \$5.6M  
EE: AOR Sales  
42% of  
revenue  
50/50  
HVAC  
Service

### 3-YEAR DIRECTION

- Vendor invoicing
- Increase close rate by 19%
- Decrease DFO by 4.3%
- AOR PROCESS
- Objective from AP Automation through intact

Date: 12/31/2023  
R: \$14.65M  
P: 2.190M  
EE: AOR  
Sales  
42% of  
service,  
50/50  
HVAC

### OUR BETS

### 1-YEAR FOCUS

- eliminate line of credits for CF

Date: 06/06/2023  
R: \$1.09mm of CF AOR  
P: 17%  
EE: 372  
service  
agreements  
(\$800  
avg)

### QUARTERLY OBJECTIVES

- Vendor invoicing
- Increase close rate by 19%
- Decrease DFO by 4.3%
- AOR PROCESS
- Objective from AP Automation through intact

## QUARTERLY OBJECTIVES

**MAP YOUR  
DESTINATION**





**WELL, MR. PRESIDENT,  
I'M HELPING PUT A  
MAN ON THE MOON.**

**NASA JANITOR, 1962**



# DESTINATION

- A destination with a great WHY is an asset that unites **customers** and **employees**. It engages our sense of belonging and purpose to something greater.
- The purpose of this tool is to give clarity, simplicity, and gain collective buy-in on where we are going, why we are going there, and when we will arrive.

We are going \_\_\_\_\_

by \_\_\_\_\_

because \_\_\_\_\_



We are going to sit at 3,000 kitchen tables, creating

75 value-add real estate transactions per month

by 2030

because we can solve any real estate problem





We are going \_\_\_\_\_

\_\_\_\_\_

by \_\_\_\_\_

because \_\_\_\_\_







We are going **Where?**

by

because



We are going Where?

---

by When?

---

because

---



We are going Where?

---

by When?

---

because Why?

---





**YOUR EMPLOYEES  
DON'T CARE ABOUT  
YOUR REVENUE.**

**DAN KENNEDY**





**THEY ALSO DON'T  
CARE ABOUT YOUR  
EXIT.**

**JONATHAN KING**

# A STRONG DESTINATION



World domination or transformation

Customer focused

Employee focused



Answers the famous question:  
**Are we there yet?**





# MAP YOUR DESTINATION

We are going where?

\_\_\_\_\_

by when?

\_\_\_\_\_

because why?

\_\_\_\_\_



# S2 ROAD MAP

ONLINESS  
STATEMENT

We are the only \_\_\_\_\_  
that \_\_\_\_\_  
\_\_\_\_\_

DESTINATION

We are going \_\_\_\_\_  
by \_\_\_\_\_  
because \_\_\_\_\_

CULTURAL  
ENGINEERING

VALUES

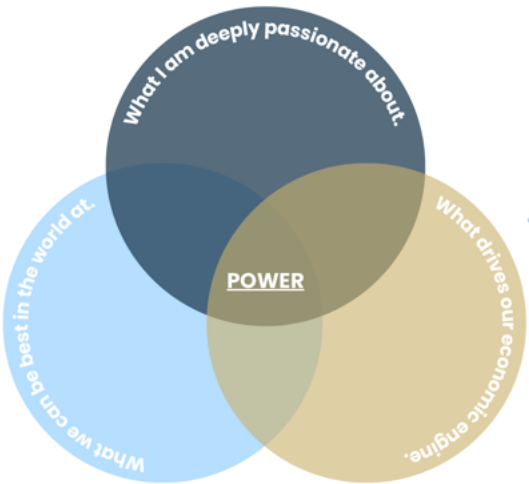


ORG HABITS



CULTURE

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



HEDGEHOG

BETS

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	_____		_____		_____
	_____		_____		_____

QUARTERLY  
OBJECTIVES



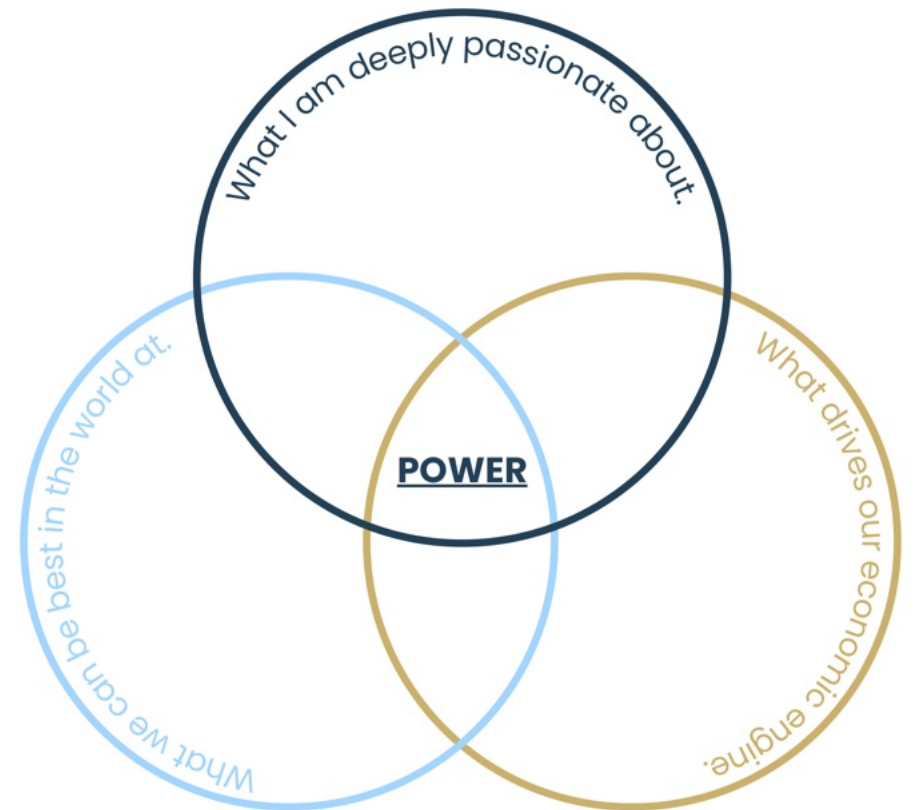
A close-up photograph of a hedgehog in a field of tall grass. The hedgehog is looking upwards and to the left, with its quills clearly visible. The image has a dark, blue-tinted overlay.

**DISCOVER YOUR  
HEDGEHOG**

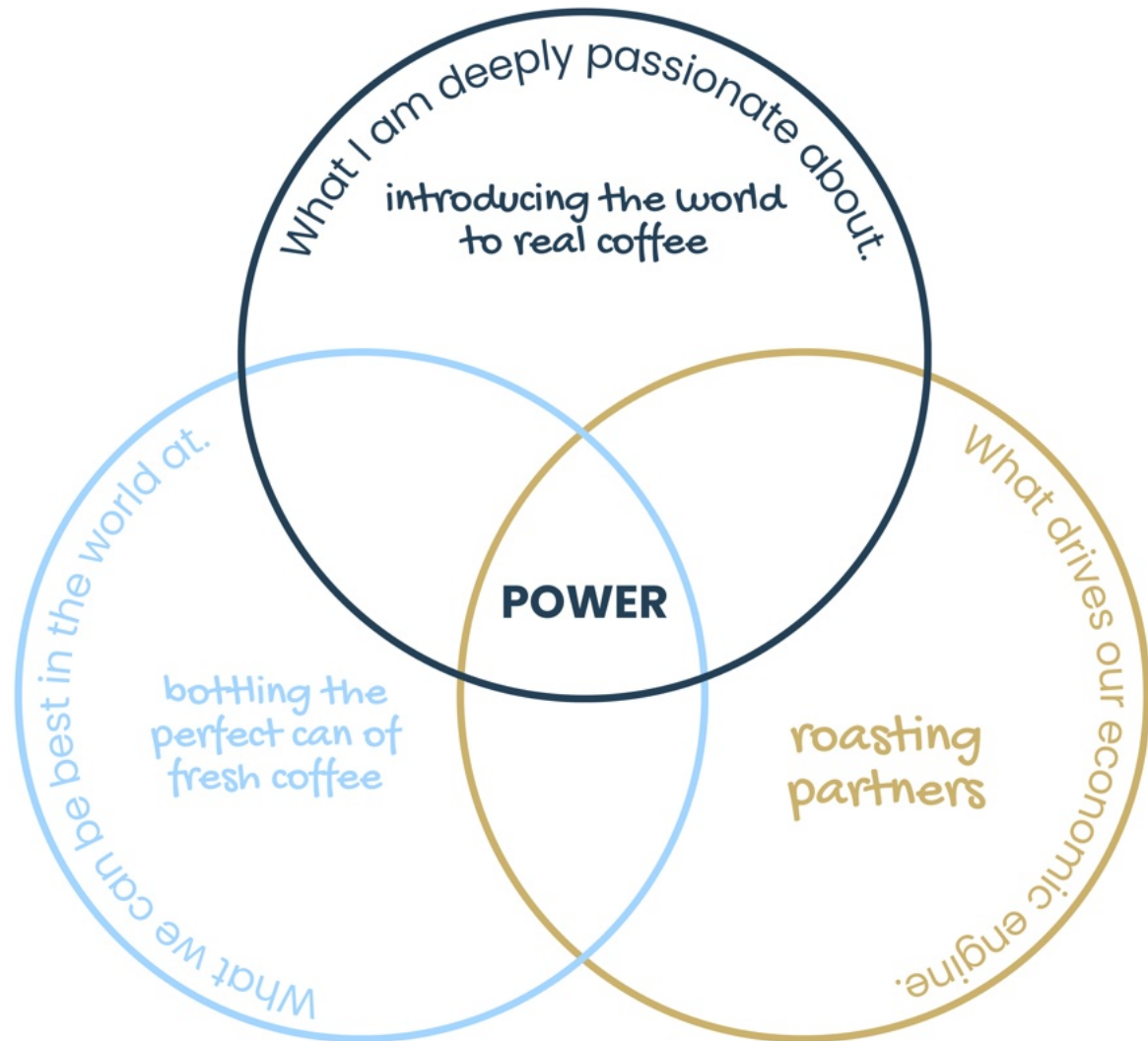
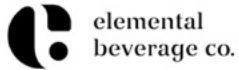
# HEDGEHOG

**Your power lies at the intersection of these three important questions:**

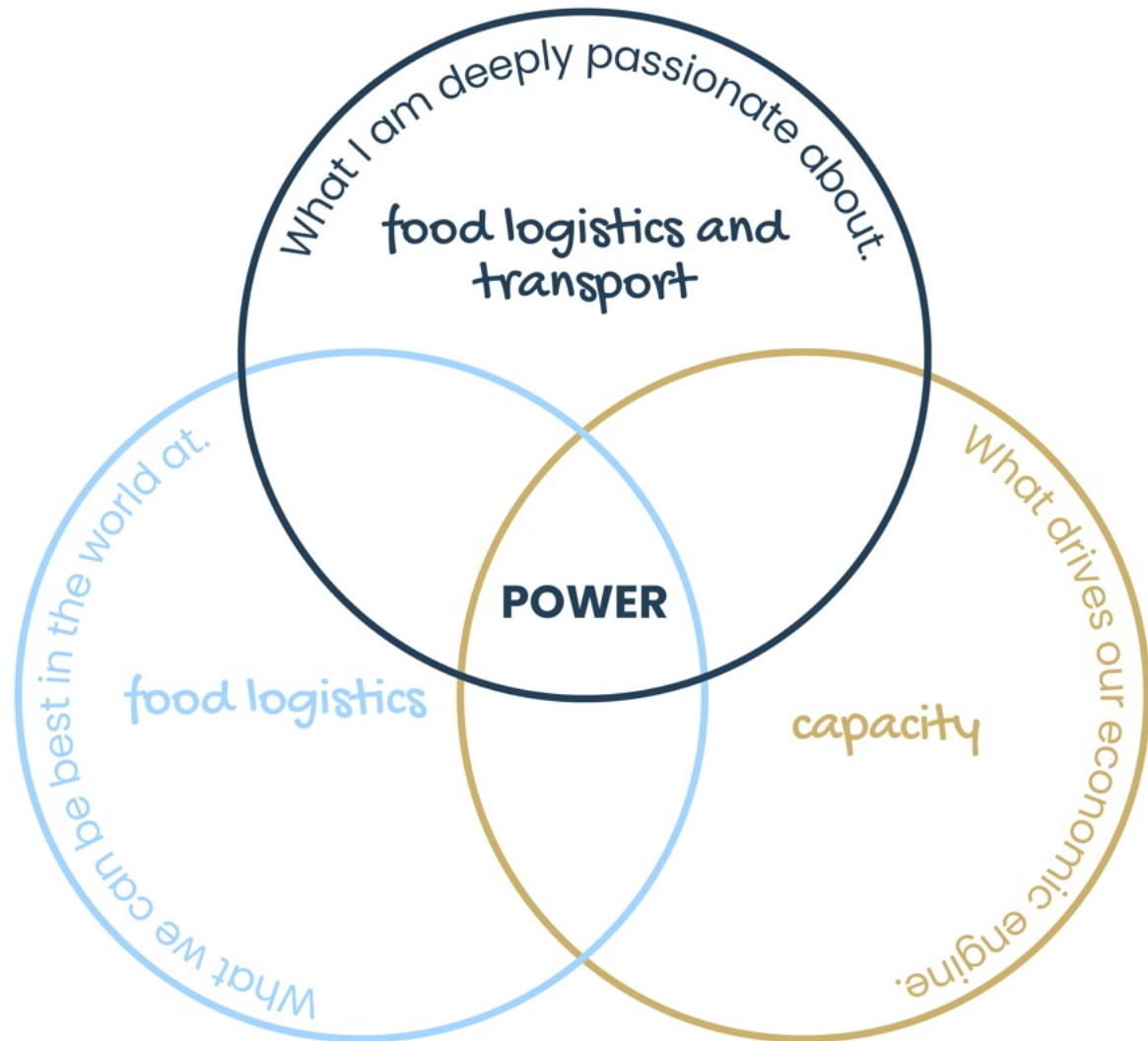
- What can we be the best in the world at?
- What are we deeply passionate about?
- What drives our economic engine?



# HEDGEHOG FOR



# HEDGEHOG





# S2 ROAD MAP

ONLINESS  
STATEMENT

We are the only \_\_\_\_\_  
that \_\_\_\_\_  
\_\_\_\_\_

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We are going \_\_\_\_\_  
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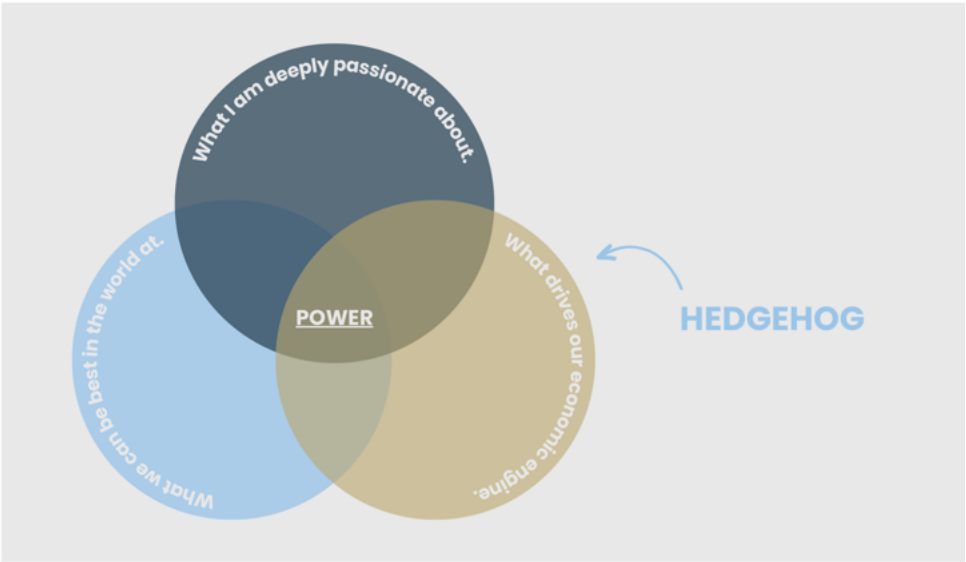


ORG HABITS



CULTURE

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



HEDGEHOG

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_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

QUARTERLY  
OBJECTIVES

# ONLINESS STATEMENT

The purpose of this tool is to help you name in a simple, clear, one-sentence statement who you are.

We are the only motorcycle manufacturer  
that makes big loud motorcyces for  
macho guys



# ONLINESS STATEMENT

**What sandbox do you play in?**

We are the only \_\_\_\_\_

that \_\_\_\_\_

\_\_\_\_\_





# ONLINESS STATEMENT

ZAG!

We are the only \_\_\_\_\_

that \_\_\_\_\_

\_\_\_\_\_





# ONLINESS STATEMENT

Who are our top 2-3 competitors?

Why do your customers hire you over them?



**Key Differentiator**



# S2 ROAD MAP

ONLINESS  
STATEMENT

We are the only \_\_\_\_\_  
that \_\_\_\_\_  
\_\_\_\_\_

DESTINATION

We are going \_\_\_\_\_  
by \_\_\_\_\_  
because \_\_\_\_\_

CULTURAL  
ENGINEERING

VALUES

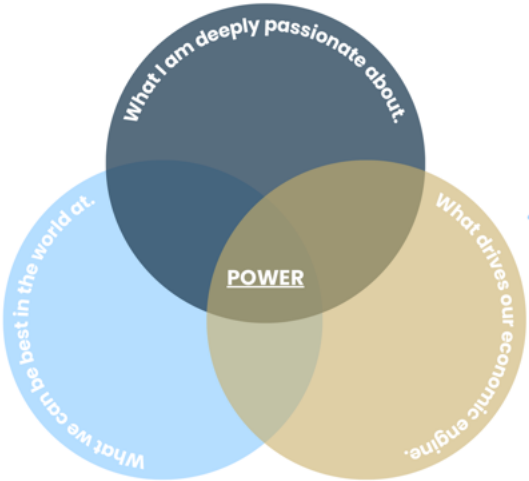


ORG HABITS



CULTURE

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



HEDGEHOG

BETS

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P:	_____	P:	_____	P:	_____
EE:	_____	EE:	_____	EE:	_____
	_____		_____		_____
	_____		_____		_____

QUARTERLY  
OBJECTIVES

**A CULTURE THAT  
UNLOCKS YOUR  
PEOPLE'S  
POTENTIAL**







# TODAY'S PRACTICE



01

Outline a playbook to drive alignment for your team

02

Outline a culture that unlocks the potential of your people

03

Begin to unleash the power of love in your organization



**“TOP TIER CULTURES  
OUTPERFORM BOTTOM  
QUARTILE CULTURES, BY  
200%**

**MCKINSEY & COMPANY**





# CULTURE EQUATION

**VALUES**

WHO we say we are

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**ORG HABITS**

Things we do together

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**CULTURE**

The outcome of being who we say we are (values)  
and living them out together (org habits)

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# CULTURE EQUATION

## VALUES

WHO we say we are



## ORG HABITS

Things we do together



## CULTURE

The outcome of being who we say we are (values)  
and living them out together (org habits)

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# VALUE TRAPS



**ASPIRATIONAL**

**ACCIDENTAL**

**PERMISSION TO PLAY**



# CULTURE EQUATION

VALUES



ORG HABITS



CULTURE

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# DESCRIBE YOUR CULTURE

WHAT **IS IT LIKE** TO WORK HERE?

WHAT WILL GET YOU **FIRED** AROUND HERE

WHAT DO YOU WANT SAID ON  
**GLASSDOOR?**

glassdoor<sup>®</sup>  
**BEST PLACES  
TO WORK**





# CULTURE EQUATION

VALUES



ORG HABITS



CULTURE

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# HABITS

WHAT CAN WE **DO** TO CREATE THE  
CULTURE WE WANT?

WHAT CAN WE PUT IN THE **CALENDAR**?

THINGS WE **PRACTICE**



## 2024 SPRING SCHEDULE

FRIDAY	APRIL 12	7 PM	AT SANTA CLARA	SANTA CLARA, CA
THURSDAY	APRIL 18	7 PM	VS SONOMA STATE	STANFORD, CA - RUGBY FIELD
SATURDAY	APRIL 27	7 PM	AT CAL POLY SLO	SAN LUIS OBISPO, CA
SATURDAY	MAY 4	7 PM	AT SAN JOSE STATE	SAN JOSE, CA
THURSDAY	MAY 16	6 PM	VS UC DAVIS	STANFORD, CA - CAGAN STADIUM
SATURDAY	MAY 18	TBD	ALUMNI GAMES	STANFORD, CA - CAGAN STADIUM

■ HOME ■ AWAY

\*DATES & TIMES SUBJECT TO CHANGE

# A CULTURE TO UNLOCK YOUR PEOPLE'S POTENTIAL

TOOLS: CULTURE EQUATION  
PUT IT INTO PRACTICE

1. DEFINE **3-4** VALUES
2. **DESCRIBE** CULTURE
3. IDENTIFY AND **SCHEDULE** HABITS
4. TELL YOUR PEOPLE (**7 TIMES**)





**BETS**



**MOST PEOPLE  
OVERESTIMATE WHAT THEY  
CAN DO IN ONE YEAR AND  
UNDERESTIMATE WHAT  
THEY CAN DO IN TEN**

**BILL GATES**



# 3 YEARS FROM NOW....



**R: Revenue**

**P: Profit**

**E: Economic Engine**

# WHAT NEEDS TO LOOK DIFFERENT TO ACHIEVE THOSE REVENUE/PROFIT TARGETS

PEOPLE

PROCESS

TECHNOLOGY

PRODUCT AND SERVICES

MARKETS & LOCATIONS



# WHO ARE YOU LEVERAGING TO INFORM YOUR STRATEGY? (GET OUT OF THE ECHO CHAMBER)



TEAM

CONVENE

INDUSTRY

ITR ECONOMICS



**EVERYONE HAS A  
PLAN UNTIL THEY GET  
PUNCHED IN THE FACE**

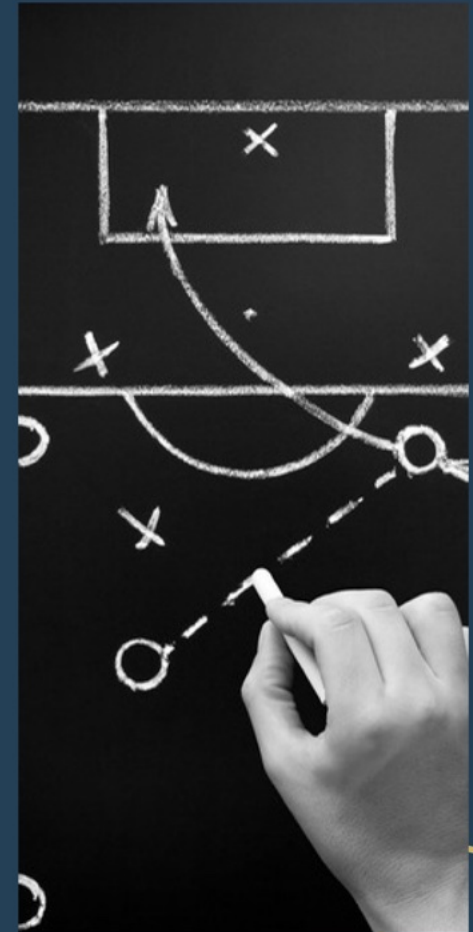
**MIKE TYSON**

# BETS

Acknowledge the **UNCERTAINTY** about the future

Have **CONFIDENCE** in accomplishing the plan

**NOT** pie in the sky  
**NOT** playing it safe









# BETS

3-YEAR DIRECTION		1-YEAR FOCUS	
Date:		Date:	
R:		R:	
P:		P:	
EE:		EE:	

QUARTERLY OBJECTIVES	
Date:	
R:	
P:	
EE:	



# BETS

Bets clarify the picture of the business we want to have long-term

It build momentum all the way to that far -off destination and all the way back to what we focus on this quarter

3-YEAR DIRECTION		1-YEAR FOCUS		QUARTERLY OBJECTIVES	
Date: 2027	9792 App Users	Date: 2021	Own Audience	Date: Q2	improve digital tools & s2 sync
R: 13m	9792 diagnostic users	R: 562k	Cash Flow Positive	R: 93k	onboard new companies
P: 611k	612 Companies	P: -23k	MRD in Fewer Seats	P: -34k	expand CS Partners Relations
EE: 312 leads	3 key partnerships	EE: 156 leads	Coach NPS > 80%	EE: 36 leads	Launch a tribe builder
	68 active coaches				Restructure coach training
					Train Cattie in Marketing Role

# A PLAY BOOK TO DRIVE ALIGNMENT

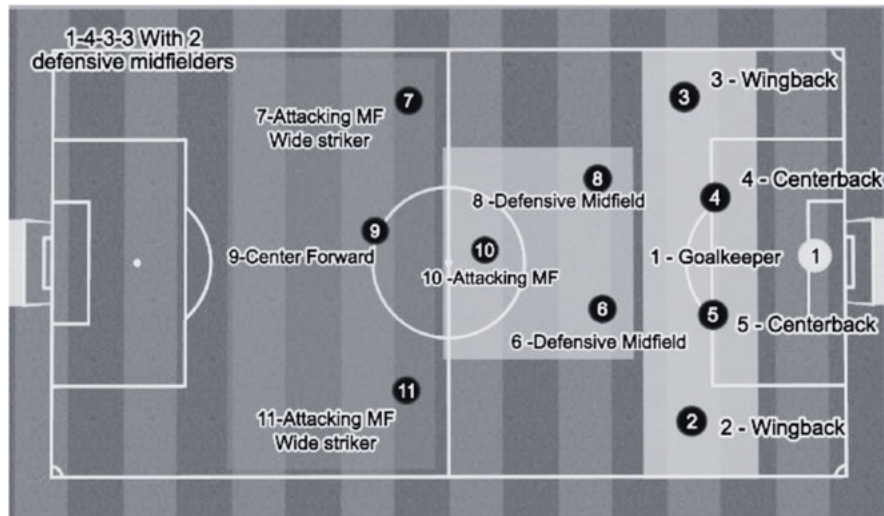
**TOOL:** ROADMAP

**PUT IT INTO PRACTICE**

- 1. SCHEDULE TIME WITH YOUR TEAM**
- 2. BUILD YOUR ROADMAP**
- 3. TELL EVERYONE (7 TIMES)**
- 4. REFUEL QUARTERLY**



# TOOL: ORG CHART



## VISIONARY

Mission

KPIs

Core Functions:

- See the Future
- Set Tone (Culture/Soul)
- Big Relationships
- Ideas/Innovation

## OPERATOR

Mission

KPIs

Core Functions:

- CAR
- Make the Plan Reality
- Leading P&L
- Day-to-Day Operations
- Removing Obstacles

## COMMERCE

Mission

KPIs

Core Functions:

- CAR
- Marketing
- Sales

## CAPACITY

Mission

KPIs

Core Functions:

- CAR
- Delivery product/services
- Customer/Client Services

## CAPITAL

Mission

KPIs

Core Functions:

- CAR
- Accounting
- Financial Health and Future
- HR
- Legal

# A CULTURE TO UNLOCK YOUR PEOPLE'S POTENTIAL

TOOL: **ORG CHART** PUT IT INTO PRACTICE

1. ALIGN ON THE ORG STRUCTURE – **1 OWNER**
2. DITCH **MUBMO JUMBO** JOB DESCRIPTION
3. EVERY ROLE HAS A CLEAR **MISSION**
4. EVERY ROLE HAS **3–5 CLEAR KPI'S**







**GOOD LEADERS BUILD PRODUCTS.**  
***GREAT LEADERS BUILD CULTURES.***  
**GOOD LEADERS HAVE VISION.**  
***GREAT LEADERS HAVE VALUES.***  
**GOOD LEADERS ARE ROLE MODELS AT WORK.**  
***GREAT LEADERS ARE ROLE MODELS IN LIFE***

**ADAM GRANT**

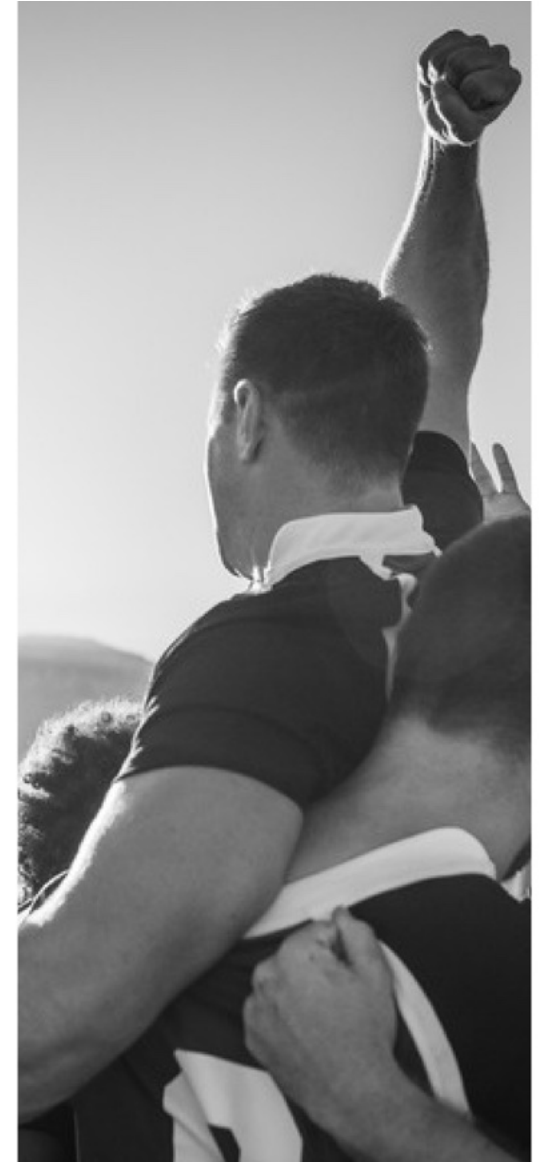


WHAT WAS YOUR A-HA  
MOMNET TODAY?



WHAT ONE  
COMMITMENT ARE  
YOU GOING TO TAKE  
TODAY?

**GREAT COMPANIES WIN BY  
BUILDING CHAMPIONSHIP  
TEAMS**



# LET'S CONNECT



**SCAN**



















FOR TODAY'S RESOURCES AND  
TO CONNECT ON LINKED IN

**JON CHEN**

**ORGANIZATIONAL GROWTH CATALYST  
CERTIFIED SYSTEM & SOUL COACH**

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# SYSTEM & SOUL VS EOS VALUE

	EOS	SYSTEM & SOUL	S2 VALUE / NOTES
YEAR DEVELOPED	2000	2021	CONTINUOUSLY <b>IMPROVING</b> , GROWING   YOU GET THE <b>LATEST BEST PRACTICES</b>   <b>FLEXIBLE</b>   <b>EOS HASN'T CHANGED IN 21 YEARS</b>
PURPOSE/VISION			MORE <b>CLEAR, GALVANIZING, COMPREHENSIVE</b>   <b>SOUL/PASSION</b> DRIVEN   <b>CLARITY</b> IN ETHOS AND IDENTITY
CULTURE			BUILDS A <b>THRIVING, INTENTIONAL CULTURE</b> , BRINGING IT <b>ALIVE</b> THROUGH <b>EVERYTHING YOU DO</b>   EMPOWERS/GROWS EMPLOYEES AND <b>INNOVATION</b> , DRIVES <b>CUSTOMER PASSION</b>
ROCKS VS BETS			WANT TO WORK ON ROCKS OR MAKE <b>STRATEGIC BETS?</b>   ACKNOWLEDGES THE <b>UNCERTAINTY</b> OF BUSINESS   BETTER <b>EXECUTION</b> OF OBJECTIVES THROUGH <b>MILESTONES</b> AND <b>CASCADING</b>
ORG STRUCUTURE			IMPROVED CLARITY & ACCOUNTABILITY WITH <b>MISSIONS</b> & <b>INDIVIDUAL KPI'S</b>
KPI			<b>COLLABORATIVELY</b> DEVELOPED
WEEKLY MEETINGS			<b>PEOPLE</b> & <b>CULTURE</b> LED. FOCUSED ON <b>ALIGNMENT &amp; PROGRESS</b> VS MEETING PERFORMANCE
EMPLOYEE 1 ON 1			FOCUSED ON <b>GROWING PEOPLE</b> , NOT ON HOW PEOPLE ARE GROWING THE COMPANY
QUARTERLIES			NEW <b>LEADERSHIP AND EMPLOYEE DEVELOPMENT</b> TOOLS EVERY QUARTER, BASED UPON <b>YOUR NEEDS</b>
ADDITIONAL TOOLS			<b>6 DIMENSIONS OF COMPENSATION</b> - ENSURES EMPLOYEES ARE <b>HOLISTICALLY</b> COMPENSATED <b>COMMANDER'S INTENT</b> - DETERMINE APPROPRIATE LEVEL OF OVERSIGHT AND <b>EMPOWERMENT</b> FOR YOUR PEOPLE <b>WORKING GENIUS</b> - HELP YOUR PEOPLE & TEAM WORK IN THEIR <b>STRENGTHS</b> <b>TECH ENABLED PLATFORM</b> - ANYWHERE, ANYTIME, UP TO DATE, <b>COLLABORATIVE</b> MORE....