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Stop The Struggle: Essential Tools For Managers, With Jill Young

Shannon Waller: Today, Jill Young and I talk about how to use proven tools to alleviate the suffering that sometimes comes as part of being a manager and leader as part of an entrepreneurial company. So if you're experiencing some suffering, if you're stuck, if sometimes you're just not quite sure what to do, stay tuned as we dive into proven EOS and Strategic Coach tools to help you get better.

Hi, Shannon Waller here and welcome to Team Success. Today, I have one of my very, very favorite people on here who's a client, a friend, my coach, Strategic Coach's coach, she's an EOS Implementer, she's the head coach for EOS Worldwide, and just someone who has incredible wisdom about leadership, development, creativity, collaboration within entrepreneurial companies, Jill Young.

Jill Young: Oh my goodness, Shannon, that's like all the things. All the things.

Shannon Waller: And awesome mom to three boys. All of them are young adults now, which is a whole other deal. So I really appreciate Jill, because I feel like every time you and I have a conversation, new ideas, new insights, new connections happen. So we decided to record this conversation because it's so great. And it was inspired by a newsletter that you put out in May of this year, of 2023, that really talked about an issue that I was like, "Oh, my gosh, this is something I need my audience to talk about." And it's about how frustrating it is to see our leaders and managers struggle. And you work with leaders and managers. I do as well. In terms of Strategic Coach, Team Leader Program, coaching 10x, all of whom also are leaders. Obviously, you do that with your clients, with leadership teams for companies running on EOS. And, as you say, leaders and managers face a lot of issues, but don't have the tools to fix them. And when that happens, they get frustrated too. And so I thought, ooh, let's deal with leaders' and managers' frustrations and how to handle really tough issues. And the solution to that is tools. So I'm excited because I'm a strategy fanatic. I'm always looking for maximizer strategies. You are as well. And EOS has a ton. You have created a bunch, as have I. So I thought, who better with whom to have this conversation? So let's talk about what are some of the issues and what's the cost of that frustration for leaders and managers? And I'm sure there's lots of different ways to answer that, but I'm kind of curious as to what compelled you to put a newsletter together on this.

Jill Young: When we talk about struggling, there are so many things... In fact, in EOS, we'll say, you know, entrepreneurs and leadership teams, we have 136 things to deal with at one time. But really, when you think about it, the way I really love to think about it in my heart is just kind of what goes on in a mind of a leader on a daily basis. So I remember when I was a young leader, I was 19 years old. You know, I had my first supervisory position, and I remember very distinctly driving to work and having this feeling in my abdomen, and it was like a mix between tightness and nausea and I'm like, what is this? And really only now do I realize what that was. It was anxiety. It was dread. I didn't know what I was really going into that day. So, you know,



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when we say "struggle," it's more of a feeling. And what I've noticed is leaders and managers that, of course, I'm coaching, I'm teaching them the tools, and then sometimes they resist using the tools. And that's a little sad for me because I can see if you'll just use the tools, oh my gosh, it's going to work. But the struggle is really in their mind.

You know, you're a boss and you're thinking, oh, my direct report is not performing well. And now, I like this person, but I've also told the company that I would hold my people accountable. And if you don't have really great tools to really help you with that, then it just becomes this internal struggle in your mind and your heart of how am I going to do that? And it takes up so much energy for humans to go figure out that tricky situation on their own. Whereas if they would just use some proven tools, which, you know, companies who are members of Strategic Coach and running on EOS, they have access to these tools. If they will just use the tools, it becomes effortless. I used to use this phrase of effortless LMA. That's the acronym we use, Lead-Manage-Accountability. It's just effortless if you use the tools. So that's where the newsletter came from for sure. And of course we have all kinds of tools to use. Those proven tools just make it really simple. Make it really simple.

Shannon Waller: And before we jump into some of the key issues that people deal with that are hard, because there are a few, and some of the key tools, let's talk for a moment more about the cost of not using the tools or when you feel ill-equipped in a situation. I called my very first team member program for coach, Team Tools. So I'm on your beach. When it comes to that, I'm like, yes, because people need to be equipped. But there's a real cost of that anxiety and that tension that you talk about, and it can cause feelings of doubt and feel like you really don't know what you're up to. Leads to imposter syndrome, which drives me crazy, personally. There's all of these consequences, I think, that people get kind of stuck. You know, you and I can both see, oh, well, if you just did this, if you have a coordinated conversation or use an Impact Filter, use a Strategy Circle, this would get you out of it, but they don't because they're feeling stuck. So let's talk about the cost of not using the tools for a moment. What do you see in your experience?

Jill Young: The cost, I'm gonna put a big umbrella around it and use some words... Shannon, you have a phrase that I love. You say, words are tools. Words are tools. They paint pictures, help people see things more simple. Of energy management. Energy management. And you know, of course, both of our organizations love Kolbe and we use that. So I know Kolbe has a lot to do with that energy management too. But when you think about your energy management, you only have so much time and energy to devote to your work life. And because we are humans and biological creatures who need to protect ourselves, if something is feeling doubtful, wrong, stuck, frustrating, your energy will naturally go towards fixing those things first to protect yourself to then move on. It's just how we're designed biologically.



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So that chemical is cortisol, and it will, and many others, you know, many others are more well-versed in that than I am, and many other chemicals, but they will grab the attention of your brain. So if we are being pulled, I kind of think about it as pulled down or slowed down to really deal with these basic instinct chemicals, you're just not going to have enough energy left to do the creative things and the creative problem solving and the energy management going towards growth and abundance and all of those things that we want to, you know, work on new jumps and new Triple Plays, you know, all of those fun things that we love. That's the big cost. That's the big overall cost.

Shannon Waller: The book that Dan and I are working on next will have to do with company culture. The working title right now is Everything Everyone Grows. But one of the premises of that, and he's had to distill down 15 different core values down to eight to fit in the book, but one of them is "No defense budget." And it's exactly what you're talking about. It's setting up our team and our culture so that people don't have to play defense. And it's interesting and doesn't matter how long you've been doing this or how skilled you think you are. I was telling you before we hit record. Yeah, I had two situations today that in one where I'm like, oh my gosh, completely messed it up, and I've used a slightly more inappropriate word to describe it, but it was like, oh my gosh, could I have messed that up anymore? And it was two of us actually. No, I could not. I did not create that. I put someone totally into playing defense, which is never my intention, but I was not smart enough in that moment to figure it out. So I would love to have what you call a do-over, which is one of your tools.

But the freedom of it was actually being willing to admit that I'd messed up and not feeling like I had to be perfect all the time, which I'm clearly not. You know, I'm used to providing leadership in a lot of ways, but management for me is not a strength. And I completely screwed something up, with some help. But there's an honesty in saying that and the person appreciated my apology. And I still have to make it right. I'm not done yet. And there's something about, you know, because I have room and capacity to not be perfect, to admit when I make mistakes, Even though I, in my mind, made a big one, I don't have to feel defensive.

Jill Young: That's right. No defense budget. Shannon, I am geeking out on that. I love that concept. It's just so clear. Just paint a beautiful picture of what we're trying to do. And when you, Shannon, when you don't have a defense budget for yourself, And you go show people, "Oh, I made a mistake. I apologize. I was wrong." Oh, that just opens up the whole culture for other people to make mistakes because we're human. We are going to make mistakes. That's how we learn. So we want our people to make mistakes.



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Shannon Waller: This is the other part about an entrepreneurial culture, which I think is very different from a corporate culture. We should probably talk about this some more. There's not a lot of room, I think, in a larger company to make mistakes. There's a PBS special I watched, it has to be like 22 years ago. I remember I was in a room, big old TV set in the corner, and I was getting ready and I had this show on. And it said, like if you're in a big company, I think they were using like Procter & Gamble or something. You have one opportunity, you have one pitch. And if it gets accepted, great. And if it doesn't, you're out. Like this could be a year of your life that you invest into this one pitch. You said with entrepreneurs, it's completely different.

Jill Young: Oh, it's daily. I pitch my team daily ideas.

Shannon Waller: Small idea tested on the marketplace. Iterate the heck out of it. You know, which is totally how right Coach has always operated. So there's everything at that biggest stake. And we're always doing something new. So there's no perfect. There is no right. We've never done it before.

Jill Young: Shannon, I've been hiring coaches at EOS Worldwide. Now, for anybody who's like, wait, what? Aren't all Implementers coaches? Yes, we are. There's almost 700 of us. But Implementers need coaches. So I coach the coaching team. There's 15 coaches there. And I just think it's so funny. One of the first things I'd share with the coaches as I'm onboarding them is, "Hi. You may think we are perfect. We are not. We are building this coaching program as we go. So I need your help. I want a collaborator. Here's the process how we do it now. Sometimes, we mess it up. Sometimes, we have to go a little faster, a little slower. If you think of a good way to do it better, please let me know." And it's so fun. Almost every single one of them to a tee. They're very accepting, but they're surprised. They're surprised. Like what? We don't have everything dialed in? Well, we couldn't have everything dialed in or we'd be super stagnant. Like if you have everything dialed in, well, then you're just probably not growing. You're not growing.

Shannon Waller: You know, that's one of Coach's models. It's like you get to, you know, status level and there's great profit in having a great reputation in the marketplace and being known as the one. It's a very quick slide into depleted. And then if you're not bypassing yourself, someone else is going to. You want to be in that emerging and growth phase. In Zero To One, Peter Thiel talks about staying just below the line of- it's not credibility, but it's like recognition. You know, so zero to one is you're creating nothing to something. And then there's a point at which you become well-known where then you're subject to competition. So just staying a little bit under the radar is kind of amazing, but it means that you're always iterating, always changing, always testing. So there's a mindset that goes along with this. And I think to your point, what you were talking about earlier, when people are like, "Oh, okay, I have the title of boss. I've agreed when I go to work every day, I'm going to hold my people



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accountable and have that responsibility that we have to do it perfectly." And that is not the case. But having the tools to handle the tougher situations, like you mentioned, because I related my circumstance, you were like, oh, yeah, quarterly conversation, like, yeah, that would have been a good idea.

Jill Young: Shannon, yeah, the quarterly conversation, we could insert any of the tools in here, but the emphasis that I'll add here is that, you know, we'll use quarterly conversation as the example is it's a proven tool. It's a proven tool. And if you stay in the process of just using those proven tools, because there's also, there's probably thousands of tools out there that aren't proven. So if you think, well, I'm just gonna read this random person's book who invented a tool and has only used it one time, and then is saying, hey, everyone else has to use this in the world too. You put your, you call it bets and guesses.

Shannon Waller: Guesses and bets.

Jill Young: You put your guesses and bets in an unproven tool. Well, then that's a double guess and bet. And I'm not that kind of person. I like to use proven tools, which, you know, of course, Coach and EOS has proven tools. But then add on top of those proven tools your heart and your soul and your intuition. And that's a beautiful formula for running a growth-focused company that always stays at that level you're talking about. We don't slide into depletion, again, because we're using some intuition and our proven tools, but we don't become, you know, overconfident and stagnant either. It's just a beautiful combination that we get to do in entrepreneurial companies.

Shannon Waller: I know. I love it. And that's what's fun. And we're always growing and always testing and always learning our edge. So one thing as you're talking that really strikes me, Jill, and let's get into what some of the tools are and what problems they help to address. I'm aware, and I'm not sure if you would describe it this way or not, but one of the things I really appreciate about EOS is it's a system. You know, we talk about meeting pulse and, you know, the cadence of how things happen. And I think that solves a different type of problem than some of Coach tools and what they solve.

Like when you're trying to formulate a new idea and communicate that to your team, we have two great tools, one of which is available off our prospect website, which is The Impact Filter. Great way. You know, another one of our tools is Certainty/Uncertainty. Here's what I know about this idea. Here's what I don't know. It turns out when you share your uncertainties, people are like, "Oh, I could help with that. I could help with this." It's this massive invitation to teamwork. And as a leader, you may think it will erode your confidence to say, oh, I don't know things. In fact, it actually establishes your credibility. And it's an invitation to teamwork. So I think for ideas and for projects, and for problem solving, Experience Transformer, Strategy Circle, all of ours are very project based, which I really, as we're talking it's coming to clarity. But one of the things I really love, and going back to issues that leaders and managers face, is



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how is it that you prevent some of the issues of people not knowing how their performance is? And so I'd love you to talk more about the quarterly conversation and things that you know that happen on a regular cadence and what kind of issues they solve or what kind of issues they prevent. I'm curious.

Jill Young: I'll do quarterly conversation because that's awesome. But I want to start with this tool that nobody loves. How about that?

Shannon Waller: Oh, I love that. Yes.

Jill Young: Initially, nobody loves this tool. And it's the toughest tool. But also, if you get it right, oh, your life is just gorgeous. And if you get it wrong, you get frustrated and you're pretty miserable and you can't figure out why. So the tool is The Accountability Chart. You know, it's free and downloadable from the website, for sure. But this Accountability Chart is an org chart, but it's on steroids. And it's just a chart, a map of who is accountable for what in the organization. And it's not everything they do. It's what they're accountable for. So Shannon, I know you sit in the marketing seat right now at Strategic Coach, and you are accountable for bringing in leads.

Shannon Waller: Yep. Qualified leads.

Jill Young: There she goes. See, qualified leads and how beautiful that is to know that. Now, anyone throughout the organization, if leads are down, we just look to Shannon and the team and say, "How can we help? What resources do you need?" Instead of if we didn't know that, if it was, well, everyone should be bringing in leads, then the fingers are pointing other places. And is it the, who is it? And then we just get stuck and frustrated. So that tool is like the mother of all tools.

Sometimes, we'll even say as Implementers, the root of all evil will be found in the Accountability Chart. Like if we can find it, it's like, aha, this is why we're having a problem, why we're stuck because the Accountability Chart isn't clear. It's like, oh, everyone is accountable for customer service. Well, we've got angry clients right now. Oh, are we taking seven different directions with customer service? No, we need to solve it at its root and take one direction. That's a very clear tool and it's a simple tool and it's a proven tool. And if teams who are considering using that tool will just dedicate themselves to getting through the pain of those difficult conversations with each other, like, "Oh, Shannon, I don't think you have capacity to sit in that seat right now" and make a plan for that. The teams who just won't talk about those hard conversations won't have those, and that's really hard. But the Accountability Chart will just set those conversations right up for you. That's one.



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Shannon Waller: So let me just, because we have experience with that. So we've done it for our leadership team. And, oh, those were some awkward conversations. And two of the people on the team were like, oh, based on this definition, we shouldn't be at this quarterly meeting. It was really interesting. And that was September of 2019. Before COVID. Kudos to the courage of the person who said that. I mean, she spoke up and was great and she was not incorrect. So that was, but it can be, that was probably the awkward part of it. Or saying to someone, no, I don't think you have capacity. I don't think you really get it. You know, GWC, get it, want it, have capacity. And we went around the table as we were filling out the Accountability Chart and had to call each other on it.

Jill Young: Yes, you did. You did a good job, Shannon.

Shannon Waller: I'm always like take some deep breaths and put your big girl/big boy pants on. So I completely agree. And you've actually just given me a clue because I think this will help solve one of my issues that I'm having right now, because I think I need to be clear about what my marketing leaders are accountable for.

Jill Young: There you go, there you go. Look at that, I'm always happy to help you solve an issue while we're chatting too, Shannon.

Shannon Waller: Love that, love that story.

Jill Young: It's just the power of the tool though, that's it. It just made something clear in your mind because I just brought into your awareness again the power of the tool, and it just happens all the time. You know, we have five foundational tools, that's the Accountability Chart, Rocks, Scorecard, I'll slow down. Accountability Chart, Rocks, Scorecard, Level 10 Meeting, and the Vision Traction Organizer. And really, to make things even more simple, 80% of running well on EOS is getting those five foundational tools lived throughout the whole organization. I know there's other tools also, but when we think about where leaders get frustrated, and I'll look at, you know, even teams, teams that I coach, I'm not perfect, they'll be frustrated. And I'll ask them, like, I'm thinking in my mind, what tool have they not mastered of these five? That's a little bit inside my mind. And then I'll start asking questions, and they'll say things like, you know, "Scorecards don't really apply to us." Like, "Oh, but you're having an accountability issue. And hmm, so how about we try a Scorecard?" Because the tools are just so simple if we'll use them.

Shannon Waller: I don't think I actually clued in that there were five foundational tools. So thank you.

Jill Young: You're welcome. You're welcome.



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Shannon Waller: We have a five, too. So I'll share those in a second. But it's interesting. Like I feel like with my team, I'm doing, like got them on doing Rocks, which is great. And the reflection on the Rocks at the end of the quarter led to- Because you did that with L10, you know, our L10, the leadership meeting. And then I transferred that to my team and they rated it as the highest score we've ever had for a marketing meeting.

Jill Young: Lovely, Shannon. Look at you, using the tools. And using the process. You know, don't need to struggle, right?

Shannon Waller: Nope, we're killer on Scorecards. L10 Meetings are great. Actually, most of us scored more than the last ones at 10, because we had a tough conversation. I think we're very good on the VTO, thanks to you, Vision Traction Organizer. So the one that still needs love is Accountability Chart.

Jill Young: All right then. We'll work on that. So as soon as we're done on the podcast, we'll whip out the Accountability Chart.

Shannon Waller: Oh, great, this is what it's like having my coach. And there's a couple, we have five slash six, sometimes people swap one out. But some of our key tools that we talk about, our kind of key five. And this is more for individuals, right? So yours is very much for the leadership team and ours tend to be for visionaries and/or individual leaders. So Positive Focus. Gets people out of The Gap, super important. Impact Filter, brilliant way to capture intentionality and what people are up to. Strategy Circle—all those things that seem to oppose our goals are actually the raw material for achieving them. So getting really clear on the goal, the result, the obstacles and strategies. And if you've done The Impact Filter, you've done half The Strategy Circle, you've got the goal and result. Love that shortcut. So that's another one. My other, oh my gosh, this one is my biggest learning tool, and that is The Experience Transformer.

Jill Young: I love The Experience Transformer. It's just part of the way I think now. What happened? What went well? Yeah.

Shannon Waller: What didn't? Brainstorm the options, and knowing what I know now, what would I do differently next time? You know, it's so powerful, gets you out of what we call The Gap. Measuring yourself against an ideal gets you into motion, also really important. So that's key. And then the other one for at least people in the Signature Program is The Weekly Planner, which really integrates your time, your activities; your Entrepreneurial Time System—Free, Focus, and Buffer Days; your crucial results—what do you absolutely have to get done this week no matter what; your Top 20; your Farm Club; your key relationships for the next 90 days; revenue; and then 91 days plus. It also has your key projects. I just had my strategic planning meeting with Katrina this morning, and it's amazing. I think we did 64 out of 57 planned



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activities. So yeah, and that's in three and a half weeks because there were some Free Days in there.

Jill Young: Okay. You were vulnerable with me and this audience. Now I'm going to be vulnerable with you. I'm looking at your five key tools, and I'm thinking, yep, Positive Focus, all the, yep, Impact Filter, mm hmm, Strategy Circle, I'm good there. Also, thank you for that little insight that Impact Filter, you're halfway done on the Strategy Circle. I'd never put two and two together there. Experience Transformer, like I said, it's part of my, just the way I think. And I'm not using The Weekly Planner. And no wonder my Free, Focus, and Buffer Days sometimes melt into one another. We even, there's a friend of ours, Alex Freytag, Alex, if you're listening, hello. He like religiously uses that Weekly Planner and he like, pulls it out of the thing. In fact, when we were in session and we were in the same group, I would just give him mine because I never used them, right? He's like, "Oh, I'll take yours." And now I'm like, Oh, that's...

Shannon Waller: And there's this lovely thing I host every Mondays at 11 called The Weekly Planning Call just in case you want to...

Jill Young: That little thing that you do every week that I've had access to for five years, you know. Oh, this is good. I love we're talking about using proven tools. But I mean, you and I, we live in this world and just taking a chance to reflect and saying, I mean, this is a little coaching thing for both of us right here. We're in a coaching moment. To just take that time to say, what tool could I use to improve my life? What tool could I use to end suffering? We don't need to suffer so much.

Shannon Waller: That's a brilliant context for this. How do you end suffering, your own and other people's? Because all of us want, I want people to be happy with themselves. I don't want them to be struggling and suffering.

Jill Young: What tool can I use? What tool to use is a great first question.

Shannon Waller: It really is. So knowing tools, I know that I have, I literally intend to attract great tools to myself because I need them. And I remember, to your point, what you said earlier about my thing, that words are tools, because when I was growing up, I was a very introverted—I still am introverted; nobody believes me, but it's true—very introverted. I did not relate well to my peer group. I would much, much, much rather read a book than go out and play with people. My mom, poor thing, she was like, "Just go outside and play with your friends." I'm like, "I'd rather read my book." It was way more interesting. I'm still an avid reader. Now, I'm much better at talking to people, but I just did not relate. Finally, I found my tribe. Thank God. Life is way more fun.



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But I didn't have that conversational capability. So I am so clear that words are tools. And I love, and we've talked about the top EOS and top Strategic Coach ones, but I want to list some others for me that have been super impactful. So Chris Voss. Brilliant book, *Never Split the Difference*. Also, he's got great courses. He's got an amazing master class if you're part of that system. And three things I take out of that, I mean, super bottom line, it seems like—this is tactical empathy—it seems like, it sounds like, and repeating the last three words. Oh my gosh. I mean...

Jill Young: Such a great tool.

Shannon Waller: And Dan thinks I'm a great interviewer. I don't think I ask him that many questions, but I will say, "It seems like," "It sounds like," "Tell me more about that." I'll repeat the last three words and then all this amazing stuff comes out of him. It's incredible. So I love those conversational capabilities. I'm attracted to those. The book, *The Coaching Habit*.

Jill Young: I was just going to say that. You were talking about Chris Voss. I'm like, "Oh, *The Coaching Habit*." Such a great... questions. Just seven questions

Shannon Waller: Seven questions. What's on your mind and what else?

Jill Young: Love that one. Hey, that also works with teenagers, by the way, instead of how was your day? I'm like, what's on your mind? Oh, until they figured out that that's what I was doing is getting them to talk to me. And now I use the last three words, right?

Shannon Waller: There you go.

Jill Young: Just switch it up. Switch it up.

Shannon Waller: And that book, by the way, is by Michael Bungay Stanier. So great, brilliant book. And he's got a second book called *The Advice Trap*. In other words, bite your tongue. That's the point of that book. The whole point is asking questions and what you're listening for, I find super helpful. And then yesterday when I was in an EOS coaching session for Implementers, it was like sometimes silence is a great tool or speaking from your heart. You know, we can get a little bit caught up in our heads sometimes about, "Oh, do I know the right tool or what should I say?" And we saw some people kind of spin out with that a little bit. And it's like, no, no, no. What I've learned is, I don't have to have the right words all the time. I can stumble over them. If I am coming from a really clear intentionality and I am for them and I'm saying it with love, 'cause I like to come from that place—and you have a great thing to say about that too—the message gets across. And people then feel safe to step into that with me. And I can be brutally honest. There's someone I used to coach. He would call me up and he just had the worst teamwork. I can't even call them capabilities. Habits? It was awful. And sometimes I'd be like, "John, you didn't really say that, did you?" He goes, "Yeah, I know." Like, he would just agree with me because he knew I was for him.



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But I'm like, "Honey, you can't say that." But I had that level of relationship with him, which I just treasured. It was quite fun. And and he was a great inspiration for my then blogs, because I'm like, oh, dear, note to self, never do this. He was my muse in that regard. But it's amazing. I used to say I could get away with murder, so to speak. Because you can get away with being really honest with people if they trust your relationship and that you care about them and you want what's best and you're not about your ego, you're about them and making the situation work. It's amazing how far that goes.

Jill Young: It sure is. It's the presence. So we're talking about tools. You know, and we've gone over five EOS tools, five Strategic Coach tools, but in order for those to really work, you wrap that around with your heart and your intuition, and you connect with another human being. All of these tools we've talked about, the EOS tools, Strategic Coach tools, they can be used without love and care. Kelly Knight, our Integrator at EOS Worldwide says, "Care and concern, care and concern. Let's live every word of our VTO, Vision Traction Organizer, and deliver it and act on it with care and concern." All of those tools, if they are led with just your head, those too can fail. They can be taken the wrong way. They can cause people to have defense budgets, wrapping back around to Dan's thing. But you wrap that around with love and true connection, and oh my goodness, when we talked about energy management, the energy you put into those tools is going to go so much further. And you, the leader, are going to have such an amazing life, even if you'll just use these foundational tools Shannon and I have been talking about. Even if you forget every other tool, but you just use these five, wrap it with love and concern. It works. It's 80%. You know, Shannon, we love it. EOS Worldwide. We just love, like, do the 20% that's going to get you 80% of the results. It works.

Shannon Waller: Well, and to bring up a term that Justin Cox mentioned yesterday, otherwise you can end up weaponizing the tools. You can end up weaponizing the concepts and then you're out to do harm. You are not out for progress. So I think being very conscious and aware of our own state of being before we use something, which means getting out of your own way, not being defensive yourself, doing your own, what we would call Positive Focus at Strategic Coach, recognizing your progress, because it's so easy to go into The Gap as a leader.

Jill Young: Shannon, can I share two examples of just things that I've seen happen? And they're both with Coach tools and EOS tools. So one of them I'll use for the EOS tools. You're teaching Rocks. These are agreed upon high priorities for the next 90 days. And inevitably, a leader will come back and they'll go, "Well, Rocks don't work for my team because I handed out 42 Rocks to my team. I handed them out and I said, 'Those are your high priorities. Go get them done.' And it didn't work." Well, no wonder it didn't work, right? There was no collaboration. There was no alignment. There was no listening to those other ideas. I've seen that happen. I'll go, well, let's rewind. Let's see if we're going to go use this tool in a very collaborative way. You also know, Shannon, I love my clients to belong to Strategic Coach. Number one, because they're super cool and I like to hang out with them at Strategic Coach.



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But number two, it just helps them give better clarity to their teams. I recommended Strategic Coach to one of my Visionaries and he'd only been in Coach, you know, maybe two quarters. And he said, "Oh, Jill, what I do now is I just fill out all of these Impact Filters and I run throughout the company and I hand them to everybody and say, 'Get this done.'" And he goes, "I don't think that's working." Like, oh, you might want to call Kristi and see if there's another way to use those Impact Filters, because that's not how I use the Impact Filters. But again, like, if you're not really wrapping it around with care and concern and, you know, love and intuition, well, yeah, the tools used with the wrong intent, they're going to cause more problems.

Shannon Waller: Well, and you're not going to get the buy-in. And the one thing that I love that a lot of our clients do is they will fill out a tool, usually an Impact Filter, and they will take a picture of it, and they'll send it to their team. And then the point is, ask me about this when I get back. Right? So it's the starting point for a conversation. It's not the end. It's not, "Do this." It's not an autocratic to-do, because it's interesting, in today's work world, you know, we're definitely in the knowledge economy. This is not a transactional, you know, we're not working with peons who, not that we ever were, let's be clear. But we're not working in a mechanistic world. We're working in a creative world. And so, not giving people an opportunity—and we know this from Kolbe and CliftonStrengths and PRINT and all the other profiles—people have a lot to bring to the party. And if you don't invite them to participate and you just tell them, that is not the way to get a quote unquote knowledge worker engaged. So, stop it, would be...

Jill Young: So yeah, so stop it. That's your next tool, Shannon. Write a book called Stop It.

Shannon Waller: Oh my gosh, there's an awesome clip. If you are on YouTube and you Stop It video by Bob, what's his name?

Jill Young: Newhart. Bob Newhart. I've seen it. It's hilarious. I love it. Well, just stop it.

Shannon Waller: Just stop it or I'll bury you alive in a box. Anyways, oh my gosh, you have to, there's a good sense of humor there, but we can fall into that trap because we just want to get stuff done. And we see the importance and we see the vision and we just want other people to just get it and go. So in our excitement slash urgency, we can fall into that trap as well.

Jill Young: There's maybe one last tool I wanna share. And I did say I was gonna go over the quarterly conversation, but that can be found in the book How to Be a Great Boss. This is one that's maybe a little less known, but it goes into that, we just wanna get it done fast. I call it the fire department tool. And this is where when you're a leader and a manager and things are just moving and shaking and your people have, like, they've made a mistake and you just have to jump in and fix it. The story I like to share is, I have one of my companies, they put down these beautiful floors of this custom concrete and it's colorful and it's gorgeous and like million square feet. It's just beautiful. Well, they were pouring it and the color was wrong. And the



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crew knew it. And they called the boss and they're like, this is not purple. This is pink. And the boss immediately had to say, add more of this chemical, add more of that chemical. So in essence, this boss rescued the crew. He had to. It was a million-dollar floor. It was a million-dollar-moment decision. We call that rescuing.

And you know, we don't like to rescue our people because like you said, Shannon, people love to think and they love to solve their own issues, but sometimes you need to rescue. So if you're being a fire department and you're rescuing, here's the tool for you. Step one, just go ahead and rescue. Don't apologize for it. Don't try to, like, who did this? And why don't you know what chemical to put in the floor? No, just rescue. But then you use an EOS tool. You could even use a Strategic Coach tool. But you get that topic on the issues list. And then when you're in your meeting pulse, when everyone's nice and calm and cool and collected, after you say, okay, let's solve this issue. Why was the floor being poured pink? Or what, in fact, instead of even a why question is, what was it that made the floor pink instead of purple? And then you just methodically solve that, and you solve it at its root instead of being the fire department putting issues out, fires out all over. True fire departments really, really investigate, but they investigate later. So there's another fun tool you can use.

Shannon Waller: I love that. And Coach has the same deal, like handle the issue and then afterwards do an Experience Transformer. And Dan has this great thing that he says, Dan Sullivan, co-founder of Coach, and he goes, it's 90 high percentage, 98, 99% of the time, it's not the person, it's the system. Right? And when you address it that way, if it is a person problem, like I screwed up. They will admit it. But they're like, OK, well, what system can we put in place so that that's not even an option? Like, we had a situation this week where someone didn't flip a switch. So the notification about a particular call wasn't on the website. Now, unfortunately, some clients wanted to be on it, so they called them like, where's the information for that? But it's like, why is this left up to a human? How can we automate this? So we fixed it immediately.

There was definitely putting out a fire, to your example. And then, how can we make sure this never has to happen again? And how can we improve this system? So that it's not dependent upon, like some things just shouldn't be humans. It should be automated. This was not a creative act. Let's just be clear. It was just silly. I could not agree more. EOS and the Coach are definitely on the same page. Now, just as a bonus, mostly because I need it, the quarterly conversation I think is key, because I mean, there's a lot of EOS tools. I think- There's a lot of Coach tools, but I'm more familiar with them. I'm getting good at EOS tools, but I'm going to say right now, I'm not good at this one. Just as a bonus, as we wrap up, let's talk about the quarterly conversation, because I think it solves... Because it's quarterly, it solves problems from happening. You're not building up for a year for an issue when it comes time for performance reviews or salaries or crap like that. You actually are addressing things, I imagine, much sooner. So I need to know about this quarterly conversation.



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Jill Young: OK, here we go. So the first thing is to really think about, within the LMA tool, the Lead-Manage-Hold Accountable tool, we really state that a good manager should give feedback quickly, within 24 hours. We're not letting it build up ever. So it can go on an issues list, it can be a quick email, a quick conversation, so the feedback happens often. The quarterly conversation is just this, you know, one time, once a quarter, right? There's the quarterly. But it's a conversation. It's not a review. It's a conversation where you get one-on-one time with your direct report. And the goal here, Shannon, is for you to find out from your team member who is reporting to you what is working and what is not working. And you are just listening. What's working? What's not working? And then, we have an agenda for the quarterly conversation, and we call it the 5-5-5.

The 5-5-5 is kind of a funny little name to represent we would like you to ask questions and have conversations around, we suggest, around three things. It's the company's five core values. Again, if you don't have five core values, we're still calling it the five by five, because that's maybe an average three to seven, right? The five core values, there are five Rocks they're working on right now. And again, it's one, two, three, four, please, like, no more than seven. That's crazy. You know, about the five Rocks they're working on. And then there are five roles from the Accountability Chart. And if you just go into that conversation, Shannon, with nothing else prepared except, if I'm your team member, I'm going to just have an hour-long conversation with Jill to extract what's working and what's not working. And then I'm going to ask her questions and topics around, "Jill, how are you feeling about the core values? What core value most resonates with you? Where do you see our team living the core values here at Strategic Coach?" And then, "Jill, how are your Rocks? You're saying they're all on track in our Level 10 Meeting, but are you stuck anywhere? Do you need a resource? Do you need my time for anything?"

And then, "Jill, how about those five roles you're living on the Accountability Chart? Those roles correspond to your Scorecard numbers most of the time too. I've noticed this number is off track. Is there something at the root that we can help?" And again, it's just a conversation. You don't document it. You don't have to have it super formal. In fact, it's very important that it's not formal because then people are more willing to talk about it. And then, you know, of course, coming away from that conversation, Shannon, sometimes we say you have three outcomes because you're going to find out things and you're going to think about, oh, that's an issue and that's an issue. But I always like to, whenever I talk about quarterly conversation, to really talk about these three outcomes because it's going to give the bosses and the leaders just a little more confidence going in to the quarterly conversations.

One outcome is that, Shannon, there might be things you say to your team members. "I'm going to fix that. I'm going to take that to the leadership team. I'm going to put this on the issues list. I'm going to go talk to somebody else about that." That's one outcome. Second outcome is, you're going to ask me, your direct report, you're going to say, "Jill, you go fix



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that." That's a conversation you need to have with a team member or a client or go fix that process. And you're going to encourage me to do that. But the third one is kind of fun. It's, "We're not fixing that. It's not going to be fixed." You know, these are things when, some examples I like is, you know, when the team member complains about, you know, "I hate Salesforce. We shouldn't be on Salesforce. We should be on NetSuite." You may feel the pain too, but we're not switching to NetSuite. So it's not going to be changed. So let's stop complaining about that one.

Shannon Waller: Yeah, and make your peace with it is really...

Jill Young: That's right.

Shannon Waller: Thank you for mentioning that third option because I think people think it's one or the other. No, some things we just have to be able to work with or around or what have you, or some company policies may not be changing. I don't like the word policies. Company principles may not be changing. So, this is something you need to adapt to. And I think we shy away from that sometimes as leaders and managers, and it's important not to. So thank you, thank you for bringing that up.

Jill Young: Isn't that great? You know, lots of companies have been dealing with, lots of the companies I coach, you know, are we going to stay working from home after COVID? Are we going to come to the office? Are we going to, and they're trying to accommodate every, every situation. And at some point I've been coaching my teams. We just decide. And we say, this is what we're doing. We may revisit it, but not this quarter. And think about the energy that that frees up from the leader just using this tool, the three outcomes tool. We might talk about it in 2024, but for right now, this is what we're doing for the next 90 days. Frees up that energy, you gave a sure decision and we move.

Shannon Waller: I think that's really powerful. Well, thank you for the bonus tool.

Jill Young: Oh, I'll come back anytime. I got lots of tools. We could geek out on tools forever, but it's just, remember, tools relieve suffering. We don't need to suffer through any of these decisions or the things that we're going to really need to take on, like on a daily basis. If you're having that dread like I was at 19 and having that dread driving to work, ask yourself, what tool can I use? It makes life a lot more simple and happy.

Shannon Waller: Right, and I think as leaders, there's four words that Dan has put together. It's like, this is what to be alert to. So, alert, be curious about, be responsive, and be resourceful. Find and use the tools. Don't compromise, don't settle, don't stay stuck, don't get defensive. Be alert, curious, responsive, and resourceful about finding the tools to alleviate your particular suffering. Some of us easily step into other situations, other people are like, and other people are brilliant in situations where we're like, um, can I not do that today, please?



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Right? So I think it's a very personal, obviously, there's company tools you want to use. But, you know, there's going to be ones for you that are very, very important for your growth and development as a manager and a leader. Oh, Jill, I have loved this conversation. Thank you for coaching me. Thank you for coaching us.

Jill Young: Oh, there we go. We got live coaching, right? There we go.

Shannon Waller: Well, and that quarterly conversation is so great because it's the what people are doing. It's the how they're doing it in terms of the core values. It will head issues off at the pass in terms of behavior or performance. And it's different than your regular Scorecard meetings. This is really about how to help people show up as their best self and most contributing self. So I think I've learned a ton, and I think it's very useful. And just the fact that the tools are out there and they're designed for entrepreneurial companies.

Jill Young: That's right. And they're proven. They're proven. There's over 20,000 companies running on EOS. And I know Strategic Coach, you've put how many entrepreneurs through this system?

Shannon Waller: 20,000.

Jill Young: Yeah, we like that number, don't we? Like, there we go. We're just growing together. And so if you're ever wondering to yourself, if you ever ask yourself, oh, what should I do? Instead, just consider asking yourself, what tool should I use?

Shannon Waller: Excellent.

Jill Young: And you have access to the tools. If you're listening to this podcast, you have access to the tools.

Shannon Waller: Sure do. And this is a cool thing. The tools are available. So how can people download some of the tools that you've talked about?

Jill Young: Sure. For the EOS tools, that's at eosworldwide.com. And there's just buttons all over that say "download the free tools." So please do that. For any of the tools like the fire department tool or the do-over tool, those are found in my books. You can find those at jillyoung.com. You have to put a www in front of that, I found out. jillyoung.com, there's some fun things there too. Or connect with me on LinkedIn and I can direct you to the tools that you think you need.

Shannon Waller: I love that. And same, a lot of our tools, not The Experience Transformer, but Positive Focus is available and The Entrepreneurial Attitude and some other things are available at yourteamsuccess.com. Again, yourteamsuccess.com. And then Impact Filter and some other of our great tools that we've talked about are available at strategiccoach.com in



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our downloads. So if you're unfamiliar or not part of either EOS or Coach, then that's where you can go and get those goodies. So, Jill, thank you, thank you, thank you. I love that we both want to be a hero to the same people. So appreciate your coaching wisdom and clarity about things. And I love what we are up to together. Thank you.

Jill Young: And thank you. This is an effortless collaboration because of just those things you said. We both are on the same page with what we want to do, different talents, different tools, and we love each other, right? So there you go. What could be better than that?

Shannon Waller: Absolutely nothing. Thank you.

Jill Young: Thank you for having me. It's always a pleasure to collaborate. Total pleasure. Thank you.