



YOUR TEAM SUCCESS PODCAST

Daring To Build An Intentional Culture, with Mark O'Donnell, Kelly Knight, and CJ DuBe'

Shannon Waller: Do you find the people part of your business one of the most challenging? Well, Mark O'Donnell, Kelly Knight, and CJ DuBe' have written a phenomenal book called *People: Dare to Build an Intentional Culture* that aims to address every single one of the issues. So whether or not you're running on EOS, Entrepreneurial Operating System, there is so much wisdom and so much coaching available both in the book and through this conversation as I do my author interview. So stay tuned, I think you will be enlightened and raptured and intrigued by our conversation.

Hi, Shannon Waller here and welcome to Team Success. Today I am over the moon because I'm doing an author interview with three of my very favorite, most esteemed, smartest people I know, and it's about their new book, *People*. And the people I'm talking about are Mark O'Donnell, visionary of EOS Worldwide, Kelly Knight, integrator of EOS Worldwide, and CJ DuBe', esteemed EOS implementer, in fact, EOS Worldwide's implementer, which is kind of amazing. So I'll have you guys go around and do more of an introduction. Also, all long-term clients of Coach, which I love, so we're very much integrated and we're clients of each other, which is really pretty neat. And then we'll talk about the book a little bit. So why you wrote this book, people, why it's so important. And I felt like one of the reasons I was so excited is because people is my thing, right? Unique Ability Teamwork is what I am so incredibly passionate about. So I am thrilled you've written the book. It's brilliant. I've read it all. And I'm excited to get this new baby out to the world. So let's start with introductions. CJ, can you kick us off with who you are, what we should know about you, both personally and professionally?

CJ DuBe': Okay, CJ DuBe', an expert EOS implementer. I just completed my 1600th session this week. So I'm in about 13 and a half years. It's still my passion. It's still my love. I still have a blast with lots of different companies. I had the pleasure of being the global community leader and being part of the leadership team for EOS Worldwide for seven years, which taught me so much and helps me actually be a better implementer. So personally, I have seven children that all have significant others, and I have 12 lovely grandchildren that are always my joy. So I get to see basketball games and hockey games and swim meets and all the things.

Shannon Waller: So life is full and life is great. Awesome. And you live in two different places.

CJ DuBe': I do. I have a condo in Minneapolis, Minnesota, where I have an office and I have my home in lovely desert, Cave Creek, Arizona, where I also have an office here.

Shannon Waller: Very cool. Love it. All right, Ms. Kelly, if you could introduce yourself.

Kelly Knight: Sure. So, Kelly Knight, I've been the integrator here at EOS Worldwide for going on eight years. Hard to believe that's been a very fast, in some ways, very fast eight years. Really, it's part of the succession plan of the two co-founders of EOS Worldwide, Gino Wickman and Don Tinney. It's really been just the most amazing journey, the most incredible group of humans I've ever had the chance to work with, this community of EOS implementers



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and our team and Strategic Coach and Kolbe and all the partners that we have here. It's just been a blast. I came from the financial services industry, spent about 18 years there. And then one day I got a knock on the door to come here and it truly is just been amazing. Married to my husband, Tim, for 27 years. Our anniversary is this coming week. We've got three kids, son and two daughters, a little dog here at home, and we live in Clarkston, Michigan, which is where I grew up, actually, about an hour north of Detroit. Wow.

Shannon Waller: Awesome. It's interesting. I mean, succession plans for entrepreneurs are always interesting. Feels like they're very different than other kinds. It'd be very interesting to do a deeper dive into what the success factors were, because eight years and counting is, from my limited experience, unusual for how successful it's been, so kudos to both of you for that. And Mark O'Donnell.

Mark O'Donnell: Yeah, thanks, Shannon. So Mark O'Donnell, I'm visionary at EOS Worldwide. I've been visionary for three and a half years. I am the third visionary at EOS, starting with our founder, Gino Wickman, then Mike Payton. So I am the third, talking about succession. Prior to that, I was head coach at EOS, replacing CJ, who was the former, talking about succession, head coach. Then spent time as a coach, full-time implementer, work with about a hundred clients, five hundred sessions, way fewer than CJ, and I was an entrepreneur, I ran EOS in my companies. I had an implementer and fell in love with the community of like-minded people. I joke that I wasn't sure if I accidentally joined a cult or I was with my people for the first time ever. And it's just been an amazing journey ever since. My business was in pharma and biotech, so it's not even remotely related to what we do here at EOS. But it's been a really fun journey and we're making a difference every day and it's fantastic. Wow. It's pinch me moments often. Yeah. Personally, I live outside of Philadelphia. My wife, Rachel, I've got two daughters and a son just like Kelly. My oldest is in college and the two are in high school and middle school. And we have a monster dog who, you know, terrorizes the house and the neighborhood. So it's a lot of fun.

Shannon Waller: I love that. Well, it's very cool to get a picture of you both professionally and personally. So thank you for sharing that. All right, so you guys do a lot together. You have done a lot together in terms of EOS worldwide. And if anyone doesn't know, EOS stands for Entrepreneurial Operating System. Brilliant system originated, as you said, by Gino and Don. The strategy Coach runs on is EOS. So again, very integrated, which I totally appreciate. And one of the key sections of EOS is people. And it's been great to see the library expand with all the different books. And this, of course, is the one I'm most passionate about. So super excited to be doing this. Let's talk about people. And it has a really great title. It's called EOS Mastery Series, People: Dare to Build an Intentional Culture. And I want to dive into that. I'm always curious, what's the book about? And then why did you decide to write it other than it's just one of the components of the EOS structure? But I know the three of you have a deep, deep passion for this part, and this is probably what you help solve for a lot. So I'm very



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curious to see what the impetus for it was. But let's talk about, first of all, People: Dare to Build an Intentional Culture. What does that mean? I'm super curious. Who wants to jump in?

CJ DuBe': I can jump in quick.

Shannon Waller: OK, thanks, CJ.

CJ DuBe': For me, the word dare is purposeful. The word dare is about literally asking people to be courageous and bold and understand that intentionality is hard, hard work. And so the emphasis on dare to build an intentional culture is it's not something easy that you'll do, but if you have intentionality, you can change your business. You can change the people around you. Ultimately, your businesses can change the world as well. So that's what it is for me is just this challenge. And as I've had the opportunity, which we can talk about more in a bit, but is to use some of the tools with my companies that I've been working with, which has really been super fun to see them see that I really am challenging you.

Shannon Waller: I love that you stress dare and intentional because it does take courage. And one of the things we're going to talk about next is, you know, how did you get the culture you have? Is it by accident? Was it intentional? But I think the point that it does take courage is a very key point. People just want it to happen. They think they can will it to happen. But there's actually, as you mentioned, a whole series of tools and I would say mindsets to actually do that. And it's not easy. And one of the things this book does not shy away from, which I love, is that it's important, it's valuable, you'll end up with a much better result that impacts everyone in the world, but it's not always easy. I love that you do not shy away from that. It's a bit of a call to arms. It's like, okay, take this on, which is really cool. Kelly, what would you add to that?

Kelly Knight: You know, just the experience that I've had working and leading and managing so many entrepreneurial organizations is that it truly is the difference maker, putting an emphasis on people. And so oftentimes there's a misconception that the people thing or culture, core values, it's a nice to have, you know, like, oh, when we get around to it or when we have the resources or capability to do it, we'll get around to that. But right now we're focused on profit or we're focused on whatever the goals are. And the reality is that we are all in the people business. It doesn't matter what industry you're in. And if you can actually focus your energies using some simple tools and principles and concepts, it really takes your company to an entirely different level. So writing this book was an inspiration of all three of us because we care so deeply and we've seen it done well, and we've also seen it not done so well. And so how can we make it more and more clear for companies running on EOS, for companies that aren't running on EOS to really get a grip on their business and see how by being intentional, having the courage, putting the time and resources and mind share. It's a mindset. Am I going to believe that this matters or am I not? And then to put the effort into it, it will really take your team to a whole new level. And that to me is really the exciting part.



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Shannon Waller: I love it, Kelly. So you were in my TEDx workshop this week, and one of the things we talked about was, you know, what matters? What are you going to put your attention on? And intention, attention, you know, that whole dynamic. And it's one of those things where if you don't pay attention to it, or you're not intentional, either will be by accident or come back to bite you. And people in a business are so critical. I mean, it sounds lame to say that, but most people think, oh, yeah, well, I've heard the expression more than once. Oh, my business would be great as long as there weren't any people involved. Right? Because they're the hard and complex part of it. And I love the African proverb, which is, if you want to go fast, go alone. If you want to go far, go together. But going together is not always easy. People are complicated. Right? So that's key. Mark, what would you add to that?

Mark O'Donnell: We often say that leaders, managers, entrepreneurs struggle with a hundred and twenty-three issues in the day in the life of a business. And to the degree you can strengthen six key components, all those issues sort of fall into place. Those six key components being the vision component, people, data, issues, process, and traction. And we surveyed our clients and said, well, what is the root cause of your issues? Which of these six key components does it fall into? And 82% said people. So in other words, the root cause of almost every issue inside of the business has a human's face at the bottom of it. And oftentimes it's yours. So--

Shannon Waller: Okay, that's funny.

Mark O'Donnell: Yeah. And so when we think about daring to build intentional culture, when we're working with clients, and we see this so often, is that the entrepreneurs are sort of like, oh, these people are, everything is so hard. They don't take agency, sort of like it happened to them, as opposed to taking control of it and not understanding that they have the agency to create a culture with intent that wins in any market, in any environment. And well, how do we do that? And step number one is to have courage, like you need to take agency, have the courage to start and get rolling. And we often quote W. Edwards Deming, who said, and I'm paraphrasing, that every system is perfectly designed to produce the results it produces. So if you don't have a culture that wins, if you have recruiting issues, take ownership and work on the underlying system. Pop open the hood and dig in and you can create a culture that is intentional, that's loving, that you're proud of, where you're surrounded by like-minded people that juices you up and you can have a lot of fun every day.

Shannon Waller: That's the best. Well, we've touched on it a little bit, I think, by the way, that 82% is a very high number. It is, yeah. Not shocking, but almost.



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Mark O'Donnell: It's most of the battle. 100%.

Shannon Waller: So if you can get this part right, you've got it nailed. So is that the why or why did it come together now? Maybe that's my question.

Kelly Knight: I'll jump in here. I really think since COVID, there's been this desire, despite the fact that we've needed to be separated because of mask wearing and the pandemic and safety and all of these things. But ironically, there's more desire for connection and getting people together to make great things happen, to make an impact in the world, whatever that is. And so when we're not functioning well and 82% of the issues are still pervasive, we can't really achieve what we're meant to do, our God-given talent or Unique Ability, as we say at Strategic Coach, right? You know, so I think that there is just more desire to make great things happen together as people. Since then, I've just seen that time and time again. And when things are tough, tough economic times, it could be pandemic, it could be whatnot, there's a desire to go back to the core of people and humans. So, you know, whether, you know, you're reading the Bible or whatever that might be, it's just the cycle of things is to come back to center again. And so I think that's continuing today. And it's part of why we belong to Strategic Coach and we believe in entrepreneurs making a huge difference in the world. And how can we do that better together? And again, whatever industry you're in, you're dealing with people. So it doesn't matter how much AI is out in the world. So long as we still have humans functioning within organizations, we have to figure that out. And, you know, I think we have a high degree of responsibility as entrepreneurs to do more than just what's on our own vision statement. I think there's a responsibility for us to make strides in ways that go beyond our business, that have legs, as Gino would say, that go far out into the world. So why now? Because today is the best day to get something started, so why not today?

Shannon Waller: Yeah, it's almost like why not, right? But it feels very timely and I totally appreciate that. Oh my gosh, so many different directions I could go in. It's ridiculous. I want to talk about the accidental part because I think that's a really interesting point and that kind of counters to the intentional. And I think a lot of companies do start off accidentally. If I think about Strategic Coach, I think we did too. And I'm in my 33rd year. So 32 and a half years now at Coach. We did do that thing of hiring people's relatives and friends. We did start out that way. Now we got more and more intentional as we went on. But let's talk about that because I almost feel like a lot of it is accidental to start and then how you get to intentional. And then I have to talk about the word love because you guys do. So I want to jump there and I just want to say thank you because you are solving for a very big issue and adding a whole new ray of clarity to something that is really hard for a lot of people. So just to set some context. All right, so let's talk about accidental versus intentional. And you all, we all have had tons of experience with not only our own organizations, but other people's. And let's just talk about why so many companies start out with accidental cultures. Mark, I'm actually gonna jump in with you first with this one.



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Mark O'Donnell: Yeah. We talk about the four culture types in the book, starting with an intentional culture, and that has some really clear high level of intentionality with it. And then we have a command and control where it's very intentional, but it's not healthy. And we have a chaotic culture, which has low intentionality and low health. And then we have sort of the happy accident, which is very healthy, but it doesn't have a high degree of intentionality with it. And there's some traits that come along with that. And so when we think about what an accidental culture looks like and what are the ramifications of that, you start out, you're running your business and you kind of get lucky and you hire, maybe it's friends and family who you get along with and they have a certain level of capability that's useful for your business. And you go along and it's working, you're growing. And then you hit a ceiling. And instead of moving into a chaotic culture, which many do, you just decide to stop hiring. You decide to not add people to your team because you observe the team. Everything is going so well. You're making money. You're serving your customers really well. But you know that you don't have the systems and processes in place to grow and scale your company, your culture. So you're just like, oh, I'm not going to go hire that person because they're going to upset the apple cart. They're going to create a dynamic that we don't quite understand. We're not ready for.

Shannon Waller: So it holds back growth is what I'm hearing. It does go from playing offense to defense. Yeah, for sure. Fascinating. OK, let's just touch on the other one. So command and control. And as you talk about the birds like leading through fear.

Mark O'Donnell: Yeah, when we talk about command and control, it does have a very high degree of intentionality. It's very transactional. You're looking at people as replaceable parts. They're just here to do a job. And if they quit, so what? Let's move on. So it's very top down. It denies, as we talk about, the Unique Ability of each individual, their unique gifts and talents, and they're just a tool to get a job done. So we do see that kind of culture exists pretty often, usually in, I'll call it blue-collar type organizations, construction companies and so forth, where it's less knowledge work, but it exists in many, many types of organizations.

CJ DuBe': Interesting. I would add to what I've experienced with the control and command pieces where it exists. And yes, Mark's right. It is a lot in the blue-collar manufacturing and construction. I've seen it all there. But generationally, our newer generations don't accept it. They don't like it. So those companies end up having a consistent turnover all the time, which is affecting them, which ultimately puts them back into a chaotic culture.

Shannon Waller: That's a really great point. Yeah. I mean, there's lots of conversation about millennials, which we need to get over. But yeah, it's like one of the things I've heard is if millennials and any younger worker want a purposeful, intentional would be another great word for that. They want to work for companies with a purpose. They're not showing up to be a cog in a wheel. They want to spend those eight conscious hours that they have with their creativity,



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you know, making a difference. And they will not settle for that. So many of them have kind of an entrepreneurial spirit, so being commanded doesn't really sit well with them, which I am completely fine with, by the way. It's a generation of rebels. I'm good with that.

Kelly Knight: And beyond that, Shannon, not only do they want to be part of a mission or purpose or cause, but to feel empowered to live within their God-given Unique Ability and to give their best. And so, being able to be appreciated and valued and put in positions where they truly have our PRS, we say here at EOS Worldwide, they're the right people in the right seats, having the get it, want it capacity to do great work, that connection, and also feeling connected to the vision of where we're going as an organization matters to them. They care to understand details in ways that sometimes have not been true in the past. So it is really interesting to see that and that's a welcome change because we want to have everybody 100% of everyone on our Accountability Chart truly dialed in excited about and rowing towards where we're going as an organization. So I see that as being such a positive.

Shannon Waller: I do too. And this book is really a roadmap for how to do that. If you've got a chaotic culture, if you've got an accidental culture, if poor thing, you have a command and control culture, that's probably the hardest to give up that control. Some of us can be control freaks occasionally, but you have really provided a roadmap and you provided the mindset shifts, you've gone through the actions and the tools to help people, and EOS does as well, to really kind of, I loved your word agency. Dan Sullivan and I were talking about this the other day, Mark, to really take ownership, to realize that you have agency over this. It's not an accident. You don't have to be a control freak in order to run a successful company. So before we leave this, I mean, obviously for me, intentional, highly intentional, where we are tapping into people's strengths is the healthiest organizations. And it's not just a nice to have, there are, if I understand it correctly, some top and bottom-line impacts of this. You talked about not growing and stopping hiring, because you don't want to upset the apple cart. And I can see where there's major limitations with the other three quadrants. Who would like to speak to that about the actual concrete quantitative benefits of doing it this way?

Mark O'Donnell: Mark, do you want to jump in? Sure. So I'll kind of set the context of the concrete results by saying we surveyed now over 10,000 companies asking them the DOS question—dangerous, opportunities, and strengths. What do they want from their business three years from now? What would need to be true? And then what dangers, opportunities, and strengths exist for them? And in terms of dangers, the number one, by a long shot, is recruiting. Cannot find the right people that share their culture, that want to have the capacity to do the role that they have available. And that's a big growth limiter. And when we kind of go a little bit macro with that is the birth rate in the developed world has been very low for a very long time. And so you're never going to solve your recruiting issues because those humans were never born. The only thing that you can do is tip the scales in your favor.



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Shannon Waller: Right.

Mark O'Donnell: That is it. And so how do you create a culture that is extraordinarily attractive for people? It's got to be healthy. Just like how anything else spreads in the world, it's primarily through word of mouth. And so your current employees are the ones who are going to bring in your future employees. And if you don't have that intentional culture, super healthy, fun-loving and attract those people to you, your growth will always be just going to be capped in every way. So that's a growth limiter. The next growth limiter is if you have a chaotic culture. And just to clarify that one, it's where you have pockets of health. So it's a little bit of a cliquy type business where there's pockets of unhealth, there's pockets of health, there's groups of people who get along, groups of people that don't. The amount of time that is spent politicking, gossiping, solving issues that are really people and culture issues, your productivity gets hurt pretty significantly in terms of hours. There is some data that I'm going to quote wrong, so I won't, but it's multiple hours per day that people spend in chaotic cultures, job protecting, politicking, gossiping about one another. And so your productivity and therefore your profitability, your cash flow, everything is impacted negatively.

Shannon Waller: Mm-hmm. As you're talking, I'm thinking silos, right? So people have their own little tribe. Little cliques. Little cliques. I love that. I've experienced that. I know exactly what you're talking about. So if you don't want to inhibit growth, if you want to attract people, I really appreciate your point about demographics. I follow Peter Zion pretty much every morning. And it's true. The population is not increasing. We are not going to overwhelm the world. In fact, quite the opposite is the reality. We don't have enough people. So you have to be that super attractor in the job marketplace to just attract people to you. That is a great point. And then all that time wasted on politicking, huge cost to the bottom line.

Kelly Knight: Shannon, a Coach tool that is really helpful for entrepreneurs and teams is the Certainty/Uncertainty. So what is it that you know to be true about your current culture and your team and your productivity and your results? And what are you uncertain about or uncertain about how it's getting you where you wanna go? So that's something that I use all the time. I'd say probably every week I run through that thinking because that really gets you more clear and more intentional about what you have and what you don't have.

Shannon Waller: I used it this morning, I'm on the same page. I love that. CJ?

CJ DuBe': What I was just going to add was, you know, one of my philosophies and having spent 25 years in the placement industry, my line is always be recruiting and trying to help a leadership team actually think about always be recruiting. That just simply means always be having conversations with people. Always be sharing people your culture, what you do. And you may talk to someone for a year and they're great. And then all of a sudden that next year,



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they are a good fit for your business. So philosophy of mine that I teach all the time, always be recruiting.

Shannon Waller: Oh my gosh, this is funny because I just had a conversation yesterday with someone who really admired this person that they had an interaction with and messaged them on LinkedIn about it and then saw that they had moved to another job. And he's like, oh man, I wish I'd hired them. And so he messaged her and he goes, I didn't know you were looking. And she goes, I didn't know you were looking.

CJ DuBe': But it's true, again, we're always saying structure first. So there's a timing. I always say always be recruiting, but always make sure you have the right structure. You shouldn't just put someone you love and think they're good into a seat because that's probably not going to work. The right structure first and then always be talking and thinking of your pipeline of talent that is available to fill those seats.

Shannon Waller: And that's something that's always impressed me when I was coaching in a one-on-one conversation with an entrepreneur. And I'll be like, oh my gosh, because they would call me about team stuff. And like, oh, my gosh, you really need someone in this, I didn't say seat back then because I didn't know that term. And we'll talk about that next. But I'm like, oh, you know, it'd be really great if you had someone do this, because I'm thinking, how am I going to help them fill it? And then found that they're like, oh, I was talking to so and so a couple of weeks ago. I've known them for a year. Right. I think I could reach out to them. So it's interesting. I find that business owners are often always recruiting. I'm not sure the leadership team is, which is really interesting. So that is such a good point. And finally, I just shortcut the conversation like, do you know of anybody? And almost always they'd say yes. I stopped stressing about me having to help. But let's talk about that. I mean, just always be looking for people, always being aware that you have to be kind of like attuned to what you need and what the marketplace is holding. And let's talk about seats and the Accountability Chart, because that's what you're talking about, right, CJ, with regard to the structure. Otherwise, you bring someone in, we've done this multiple times saying, we know you're great, we know we're great, figure out what you wanna do. Yeah, that doesn't work usually. Or it takes forever to rotate around until you finally, oh, this is the slot you belong in.

CJ DuBe': Exactly. So, you know, structure first is floating above, looking down at your business, identifying when we say seat, you could liken it to a job, but it's really a function. Right function and what is the seat is that's our language but when you first you start with the leadership team and you identify what is the right structure for the business to get it to the next level and then that leadership team needs to look at the structure. Do we have the right structure? And it evolves. Our Accountability Chart is a living, breathing document that is consistently evolving. As the saying goes, what gets you here won't get you there. And that's



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just reality. And that's not always easy because we like to bring on people we like, but that doesn't usually work the way we want it to.

Shannon Waller: Mm-hmm. So let's talk about what an Accountability Chart is compared to an organizational chart, which is what most people's vernacular. So what's the difference? You heard it here. Who wants to tackle that one, CJ?

CJ DuBe': I can go, sure. Since this is what I do all day. The difference between an Accountability Chart and an org chart is the Accountability Chart puts five roles into every seat that every person that has a function is held accountable to those five roles. Basically, an Accountability Chart is an org chart on steroids.

Shannon Waller: Ooh, I like that. Oh, Gina Whitman. He talks like I do. I always say the Moving Future is like the Positive Focus on steroids, so yes.

CJ DuBe': Org accountability actually takes a while for it to sink in with a lot of students. A long time to sink in because they still have this org chart mentality in their head. But once they realize these are the five roles that you are holding someone accountable to, and can they get it, want it, have capacity to do it. So I'll explain get it. Get it, I say, is God-given talent to do the position, to do the seat, to do the function. I always use the example of a salesperson doesn't get an accountant, accountant doesn't get a salesperson. Wanted is showing up every day wanting that seat. Sure, we all have a bad day here and there, but you really want it. You have energy for it. Capacity is the mental, physical, emotional, spiritual, skill, capacity to do that job. Right. And if you think of everything that's packed in there, there's a lot packed in there. Yeah. And not everyone, when they get put into the seat, the answer is yes or no. But sometimes there needs to be growth and there's a flow that happens. I'll let maybe Mark speak to the GWC flow a little bit, but they really need to own all those pieces. I have had team members take themselves off of leadership teams because of situations in their life where they physically or emotionally cannot own that seat anymore.

Shannon Waller: Right. And I think that capacity piece, I have tools to figure out, get it. We can tell when someone wants it, do they have that passion, which is super important. But then capacity is really interesting because again, mental, emotional, spiritual, physical, all of the things. And sometimes people have fit and sometimes they don't. And sometimes they can develop it and sometimes they can't. And I think that requires a level of personal honesty with yourself and self-awareness to know whether or not that's the case. And sometimes we even have a situation right now where someone gets it, wants it, but time-wise has no capacity. And so it's a no, right? Because there just isn't room. Kelly, you're unmuted. Why don't you jump in?



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Kelly Knight: I actually think now is the perfect time for Mark to talk about the GWC flow channel that just naturally goes there. So Mark, why don't you take that? Perfect. Yeah, sure.

Mark O'Donnell: So if you're familiar with the work in flow by Mihaly Csikszentmihalyi—say that 10 times fast—so the way we're looking at this sort of challenge skill balance and how it relates to get it, want it, capacity to do it. Because when we hire someone on the Accountability Chart, they have these five roles. It's really a snapshot in time. They get it in that moment based on how we've quantified the work, the seat, the function, and they want it for how it is explained to them, and they currently have the capacity, and so we put them in the seat. But over time, the challenge of that role, of that seat, changes. We add things to them because, oh, they perform really great at this, so I'm going to give them more. And it's really a little bit of an unintentional delegation. It's a little bit of abdication instead. You're like, oh, they're good. I'm going to give this to them, and they're just going to shovel stuff on them. And what happens is the challenge of their role increases. And it starts to go outside of what we call the GWC flow channel. And that puts them into a place of stress and anxiety. They start to behave in unpredictable ways that are not healthy. And you have to acknowledge that as a leader, as a manager of what it is that you're doing. And there's some interesting research and I would love to go deeper into this about Initiating Quick Starts with Kolbe and people who are really Initiating Fact Finder Follow-Through, where the amount of challenge that is given to them, a Quick Start could probably go about 40% outside of their current skill set. They use that anxiety as excitement and energy to go forward. Whereas Initiating Fact Finder Follow-Through can probably only go about 4% outside of their current skill set before going into a place of anxiety and the same is true on the opposite side. If the challenge decreases, their skill is building over time. But they're not presented with new challenge they go into a place of boredom. And the person starts to act pretty much the same way as anxiety and stress. Erratic, trying to find something to do. Kind of bored, so they make fires just to put them out. And so you really have to find that balance between the additional responsibilities you're giving to people versus their skill that they possess and make sure that they fully get one and have the capacity. It takes a high level of intentionality to do that by a leader and a manager because we're all busy. We tend to just shovel things off to the side here. You know, you're kind of a victim of availability. You're here, so here, do this. And without ever thinking what the impact of that really is.

Shannon Waller: I am laughing because I am the perfect case study for that.

Mark O'Donnell: Are we all?

Shannon Waller: Are we all? For the last year, 15 months, I've been sitting in the marketing seat because a senior marketing person left. And I am 3295 Kolbe. So I went 60 or 70% outside GWC. And I didn't call mayday till way too late. So anyway, now we have a brilliant fractional CMO, shout out to Chief Outsiders, brilliant, saving my life and doing a great job,



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much better Kolbe, much better PRINT, much better everything for the role, much more knowledge. And now I can sort of start to be me again, but was that costly? Interesting. So brilliantly described, yes, to all the things.

Kelly Knight: And Shannon, it's always changing. So much like the Accountability Chart is always morphing and evolving, it's never done. I will sometimes get asked, when is this whole Accountability Chart thing going to be done? And I say never. But the truth is, each individual within that Accountability Chart is always in a matrix of you know, skill and capability to challenge and what is that right combination, that perfect balance to stay within that GWC flow channel that Mark described. And it's just never done. So when we have what we call quarterly conversations, literally that every 90 days, we get together managers with their direct reports and have these great open, honest conversations. It's a great opportunity to really identify what's working and what's not and if someone is acting erratically in anxiety or boredom, let's identify really why that is because they might be perfectly well suited for the seat, GWC for the seat as CJ described, but they're just in a period of stress or they're experiencing something personally that's driving that stress in a way that goes over and above the matrix that Mark described. So it's these open, honest, vulnerable conversations, the door opening that can unlock really the potential of your whole team.

Shannon Waller: And I think the Accountability Chart has been one of the hardest things for us to implement where it's still a work in progress. I'm working on something right now for the marketing team. So, you know, just to fit better with the people, with the people we have in this structure that really works to your point, CJ, I love that it's a growth structure. It's not meant to be static. It's meant to grow. But those quarterly conversations are what keep it from going off track too far. And I think that's really important for a fast-growing company. I also think it's really important for a company that's been around a while. You can get pretty darn comfortable with how things have always been and just go, oh, they can do it. Mikey likes it. You know, that kind of thing can be a terrible--

Kelly Knight: 100% and Shannon, we fall victim to that here at EOS worldwide. We had a situation middle of last year where what was described as these funky situations were popping up within the team. And so getting clear on that was really important for us. And we have a formula within the People book that is all about defining greater good. So this concept greater good gets thrown on quite a bit. Well, what is it really? And the way that we define it is that it's every word of the VTO. Every single word of that VTO has such importance and meaning and weight, and you have to believe it and live by it every single day. So it's that, every word of the VTO, multiplied by genuine care and concern. And that's that love. It's that really authentic, heart-centered leadership that we put into the work that we do in our teams. But it's a multiplier because the two of them together are what really kind of creates that rocket fuel for organizations to have that really laser focus on what matters most. That's the two-page business plan we call the VTO. And also just putting every day consistently into every word,



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every action, every behavior, every meeting, every interaction, genuine care for people and with that that's really transforming. CJ?

CJ DuBe': Yeah, I would just add on genuine care and concern, the point of genuine care and concern does not mean you don't have tough conversations. The genuine care and concern is sometimes someone is not in the right seat and you need to help them see it, understand it. Sometimes they need to move on from the business. Sometimes you need to move them into a different seat. But genuine care and concern times that every word of the Vision Traction Organizer, you put those two together, it doesn't mean that you have to stop doing tough things.

Shannon Waller: And you make that point really clearly in the book. And I think it is more loving and it's actually unkind to not address the issues. To leave someone in pain or failing or not doing well, you know, I can name situations in our company and other companies where that's happened because we didn't want to have those hard conversations or didn't want to believe them or didn't want them to be true. As my friend Daniel was coaching me, no more wishful thinking. What's reality, right? And we can only be powerful when we're dealing with what's real, which means sometimes having those tougher conversations. Again, this is the dare part for me in the book. And it's having that courage to have those conversations and address what's real so that you can grow. And that's what's so powerful about this. Oh, so interesting. I'm going to jump around the book agenda a little bit just for fun. So one of the things you talk about is right people, right seats. And let's define that. We've talked about GWC a little bit, get it one at half capacity, but right people, right seats. That's a really important part of EOS, of this book. It's something you mentioned, Kelly, Unique Ability, which is our term for it. So how do you describe right people, right seats? Why is that so critical?

Mark O'Donnell: With right people, it's simply people who share your core values. They fit your culture. They are like-minded with you. And so that really is what defines the right people. Every organization has their own set of core values. They're all unique, like snowflakes. And that's step one. You got to have people who you're surrounding like-minded people together. And that's just the values they possess. It's not about creating these homogeneous organizations without diversity or anything like that. This is just like-minded people. And then right seats are people who get, want, and have the capacity to do the seat that they're accountable for in the Accountability Chart. And it's really just as simple as that. We use a tool called the People Analyzer which is really, really simple. It combines right people and right seats together. And you just rate the person on each core value, plus, plus, minus, or minus. And you have a minimum standard of the bar. And do they get it? Yes. Do they want it? Yes. And do they have the capacity to do the job? Yes. Now, we do say that capacity is sometimes negotiable, because you can hire someone. They share your core values. They get it. They want it. They have the natural talent to do it. But they don't have the experience and skill to do the job yet. So you're putting them into a place of anxiety right away, and you kind of know it.



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And as long as you got one to three years for that person to gain the skill, knowledge, capacity, that capacity can sometimes be negotiable. Most of the time though, fast-growing organizations are fooling themselves thinking that they have one to three years. And so you're going to be frustrated, they're going to be frustrated, and it's just ultimately not going to work out. So, you know, if you can hire someone who gets it once and has the capacity to do it out of the gate, you're going to be better off.

Shannon Waller: Could not agree more. Go ahead, Kelly.

Kelly Knight: And Shannon, that's where leaders and managers have to be really honest with themselves. And I have the courage to bring that out in others because it's also a misconception, I believe, that serving the greater good of the holistic organization is mutually exclusive to the individual. That is just a misconception. The two can absolutely coexist together. You just have to find the path to do it. And the only way to do it is by being open and honest. So serving the greater good of the organization means that every word of that VTO is true and we're serving everyone on that Accountability Chart. If you have 100 people, 100 people need to be served in that. But helping that one person see their path, see something that they can't see for themselves, that is a gift that they may not receive well initially. I've been part of that before. But people often will come back later and say, thank you. I couldn't see it at the time. But this was a better plan for me to go do something else in the organization or go to leave the organization and go elsewhere. So you have to remember that what we are, we're meant to be a gift and that our people are gifts. And it's through that beautiful balance of just caring enough to go deep into these conversations that so rarely happens in our world because it's just easier to sweep it under the rug and keep going. It's not that bad. But the truth of the matter is, is all that delay, the time that's lost, is what's preventing you from getting what you want from your business.

Shannon Waller: Yes, yes, and yes, from personal experience. And also, when messes become entrenched, they are so much harder to clean up and they're so much more expensive and they're so much more time-consuming and then you also have entrenched not addressing the issue so that if you don't deal with one person, guess what? That person is also working with, talking to, training, coaching other people in that thinking. So you actually create a systemic mess.

CJ DuBe': One of the things we say is people are watching. Oh! If you think about this and you have 100 employees or 400 or 30 for that matter, they're watching. All of your employees are watching how you as a leader show up and how you as a leader handle situations with people and when it's not the right person in the right seat, there you go.



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Shannon Waller: See, exactly. I'm holding up *Multiplication by Subtraction*, which is the book I wrote to help people have the confidence to have those conversations, to move people around or move them out gracefully. So yes, yes, yes. Sorry, I couldn't resist. Yes, I interrupted you, sorry.

CJ DuBe': No, it's all great. I think you get the point. People love you.

Kelly Knight: And as long as we're there, *Team Success Handbook*, which I widely announce is one of my favorite books ever, that's all part of what we give every single member of the EOS Worldwide team. When you come on board, you are reading that to make sure that you truly are wanting to be part of an entrepreneurial organization. Yeah.

Shannon Waller: And why I wrote the book is because the language of business is the same whether or not you're in a corporation or whether or not you're in an entrepreneurial company. The problem is the meaning is completely different, right? What's expected of you, how much initiative you have to take, how much patience and compassion you need to have, how much grit and resolve you need to have. So it's such a different context. Language of business is the same. You can think, okay, they've got cash flow, team members, all the things. How you operate in an entrepreneurial company needs to be almost 180 degrees. Not quite, but ish, from a corporate structure. So yeah, thank you, Kelly. And you've been so gracious because you use it as actually part of the hiring process. And I was going to bring that up. If you're having these types of, you know, categorize them, Mark, based on the core values and the GWC, does it get like impossible to hire anybody? Like, does it take forever? I'm sure that's what people are thinking. It's like, oh my God, I'm not going to find anybody.

Mark O'Donnell: No, it doesn't. Because just as we said before, there isn't enough people to fill your open roles. But if you build that culture with intent, you will end up with a line of people waiting to come work for you. It will solve your recruiting issues forever. And so it doesn't take long because you're doing, as CJ said, you're always recruiting, but you're, and people are watching. People are watching inside your company, outside your company. And if you build that culture with intent, people can't wait to come work for you. And so when you do that, you have a job posting, you're going to have hundreds of applicants and then you have a different problem. Which is, you know, going through all those resumes and talking to a lot of good people and having to make tough choices. We do experience that at EOS Worldwide to a large degree. We'll post and we'll get lots of applicants that we can have the luxury of sifting through. So, yeah.

Kelly Knight: And all that's in the book, Shannon, is an attraction mechanism to what Mark said. There's like a magnet in the universe that when your culture looks and feels and is experienced a certain way and it's producing some kind of impact in the world in a really positive way, it just happens. You just have people attracted to that. It's very appealing. And people, again, going back to mission, purpose, cause, passion, all of that, want to be a part of



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it. So while it's hard, it takes courage, and you need to use the tools and follow it. Once done, you're setting yourself up for success for a very long time. I love it. So what is that worth?

Shannon Waller: Well, it's kind of invaluable. And if you want to have not an accidental company, but a long-term sustainable growing one, what you have laid out is the formula for how to do it. So a couple of things I want to touch on. I can't believe the time's flown by quite so quickly. What is the mindset of the leader? We've talked about it a little bit at the beginning, but who does the entrepreneur need to be? How do they need to show up? What's the mindset that a successful business owner needs to have in order to embody and execute on what you talk about in People.

Mark O'Donnell: Hire an integrator. That's a really good point.

Shannon Waller: Why don't you describe what an integrator is? Because visionary head of the business has the vision. And just so they're not a disaster, they need an integrator. So what's an integrator, Mark?

Mark O'Donnell: Yeah, so integrator, Kelly is my integrator, thankfully. And it's kind of what Dan talks about with the visionary making it up, the integrator making it real, and the leadership team, the management team making it reoccur every day. And so that's really what the integrator's function is. Executing the day in and day out of the business, typically owning the profit and loss, managing the leadership team, all the leadership team members report to the integrator. And so that's just kind of a high-level overview. And I'm kind of joking, because when you think about the audience of entrepreneurs, and this is going to all feel really heavy. If you have a great integrator fit, it will not feel heavy. You will be freed up to do what you do best, and the integrator will do what they do best, which is get into the details and management of what an integrator does and what the business needs. And so Kelly would probably be a better example of what it is she does every day instead of me.

Shannon Waller: Okay, Kelly?

Kelly Knight: No, I think that was a great summary, Mark. And I would say while we often associate visionaries and founders and entrepreneurs with being the culture, integrators really have to embrace it and be as much of that as the visionary. So I would just say anyone who's thinking that it's just one or the other, I think that's a huge mistake and a missed opportunity is that integrators really are responsible for and often have great ideas about culture. And just depending upon how it works in your communities and everything, I just think that that's sometimes also another misconception, that somehow the visionary hands over a baton and that's it. And so it's really just being passionate about it, having a lot of passion for culture and for people. And we say, if you do not love people, please do not become a leader or a manager. Do everyone a favor and go do something else. We say, you only have one life to live. Go do what you love. But for me, the very first role, as CJ was talking about a seat, the



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very first role in my seat is LMA, which stands for Leadership Management and Accountability. That's my most favorite thing that I do every day is to be with people. So entrepreneurs, surround yourself with an integrator or teams that just truly love people.

CJ DuBe': They own that, an integrator owns it. They are the glue of the business. A really good integrator that's a perfect puzzle piece, as we say, with that visionary. That's what makes the business work and they are the glue of it. They also, going back to the Vision Traction Organizer, as we say, the two-page business plan, they own every word of that. They're making sure the execution of that is happening. So are the core values working? Is the core focus working? Is the tenure target working? Are we headed in the right direction? Marketing strategy. That three-year picture, what does three years out look like? And then bring it down to the ground for the one-year plan. What are the ROCs? ROCs is another term. It's a goal for the quarter to help everyone understand that term. And then really, what are the issues that we need to be solving as a leadership team? And that integrator, which Kelly is masterful at, is holding everyone accountable to making sure that those are getting done.

Shannon Waller: Oh, this is so good. So I love that we have talked about the word love. You have to love people for this to work. And if you don't, don't be doing this, and go do something that your life purpose is better suited for. That is such a brilliant point because people do get to leadership levels because of their cognitive capabilities, their history, what they've accomplished before, but not because they love people. And if you're going to be in a leadership position, it sounds so basic, but it gets overlooked so many times. I've seen it too. If you don't love people, you don't belong in that seat. So I cannot thank you enough for reinforcing that point. I think it's critical. And as we wrap up, I want to talk about, we referenced a number of tools, which I love. So Vision Traction Organizer. Thank you, CJ, for kind of expanding on what that is. It really is a business plan. And I love that in our quarterlies and annual, we go through and we review every word of it. You know, in the annual, we spend some more time just making sure we wordsmith that sucker. Because it's a moving target, we kind of update the plan, which is really cool. Got very excited in our last one because we've got a big vision for positively impacting 100 million people in 10 years. Wow. I know. Pretty cool. Now, tracking that's a little challenging, but we're excited. And we know that like between podcasts and YouTubes and Scary Time Success Manual, which was shared, we know millions of times, we're in the millions, at least. That's kind of a big, exciting 10-year target, and Babs' Futuristic can definitely see that, which is really fun. But yeah, so the VTO is so critical, Vision Traction Organizer, is a two-page business plan. Lovely to have it down so simply. I think that's what's really key. We've talked about the People Analyzer. We've talked about the Accountability Chart. Is there any other key tool? You've talked about Certainty and Uncertainty from Coach Kelly, so thank you. Any other key tools that you reference in the book that people can look forward to?



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Kelly Knight: Mark, you can talk about the Four C's.

Mark O'Donnell: Sure, we do mention the Four C's. And Shannon, you'd probably be a better person to explain it in more detail. But it really lines up with that courage and daring to build an intentional culture that most people are saying, hey, I'm not going to do this until I'm capable of doing this. But it's got to start with the commitment to do it. Then you're going to go through your period of courage. And only after that period of courage will you have the capability to then build that intentional culture, that attraction model, so you can run the business the way you want. And then that's going to create a ton of confidence, and you're going to do it over and over again. So we really love that Strategic Coach tool, the 4 C's Formula, and it's just super powerful. There is one thing I do want to mention for the listeners here, and I'm really talking to the fellow visionaries, which is when Kelly said that the greater good equals every single word of the VTO multiplied by genuine care and concern, we talk about leadership. There's five points of what great leadership looks like. And what we say is that you're acting with the greater good in mind, by your words, your actions, your time, attention, everything you do is in line with that. And I know for myself, when I say every word of the VTO, the language, and you mentioned kind of going into detail and the wordsmithing, my Kolbe is 2, 2, 10, 3, and I'm not naturally inclined to excruciating detail. So what happens is that greater good, I read what's on the page and then I just say, yeah, that's close enough. But the negative compounding effect of close enough has a huge impact, where in my mind, this is the vision of where we're going. But everyone else is like, well, I'm doing this. Well, yeah, that's on the page, but it's close enough. But that has a compounding effect throughout the entire organization. I don't think many people realize that. Close enough is not good enough.

Shannon Waller: Mm hmm. So do you take the time or work it through with Kelly and the leadership team to make sure that you drill down, even though it wasn't your natural instinct to do so?

Mark O'Donnell: Painfully, yes.

Kelly Knight: Yes, he does. We just did that actually. It took us a wee bit of time. I think everyone walked away. It's a little bit like watching paint dry. Everyone walked away a little bit exhausted and excited and thrilled all at the same time. But you know, another piece to that is so that Mark's right, but I keep our VTO next to me every single day because it's not that I don't know what's on it and I need it there to remind, but it is a filtering mechanism for accountability to doing what we said we're going to do for every single word that's on there. And that if there's something here that doesn't match up with who we want to be in the world, then we're responsible for changing it. So for integrators out there who might be listening or for visionaries listening to take it back to your integrators, how important it is that that is front and center every single day.



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Shannon Waller: I love it. And yours is pretty, just saying. Mine is not so pretty. I'm going to make mine pretty. Yeah, so it needs to be in front of you. It needs to be real. It needs to be living. And you can edit and change it as you grow and as you go along. So I think that's a really great point. Thanks for stressing that. Oh my gosh, it's time to wrap up. Such a great conversation. Love that I can get all three of you together. The book, how can they get it? How can they learn more? How can they get in touch? All of those good things. And then what are your last words of wisdom? I'll just kick it off actually, because one of the things that is so true about this book is you are really calling people to, I'm going to say a higher standard, right? So if they want the company of their dreams, this is how to do it. It is that roadmap. It's that game plan. You lay up the tools, you lay out the thinking, so critical. But this is a higher standard of organization, which I love, aspire to, clear where I fit, where I'm there and clear where I'm not. But it's inspiring in that regard because it calls, I think, to a higher standard for how you operate your company, who you are, who your leadership team is. And I find that very compelling. Kelly, what's your final word?

Kelly Knight: So part one, where you can find it, it's officially out April 2nd, Amazon, Barnes & Noble, you can find it pretty much anywhere. And I would say my closing thought is that daring to build an intentional culture, if you can simply keep a couple mantras in mind, one is that people first, if you take care of people first, everything else works itself out. And that if you really care about the impact you say you want to make in the world, you must think about people and how you're going to build a culture that will transform and get you where you want to go. And so just have the courage to do it. There's plenty of tools and resources and concepts in this book and others that can help you get there. But make no mistake, it won't happen on accident. It's intentional. Excellent point. Mark?

Mark O'Donnell: Yeah, so my parting words would be that if you want to live the EOS life, if you want to do what you love with people you love, make a huge difference in the world, be compensated well and have time to pursue other passions, you cannot get there alone. And everyone around you deserves that life too.

Shannon Waller: Well said. CJ, last word. Oh.

CJ DuBe': Get comfortable with the uncomfortable and have the commitment to be okay with that because thinking abundance-minded and love is much better than scarcity and fear. But as humans, sometimes we gravitate towards scarcity and fear. So hold yourself accountable to abundance and love.

Shannon Waller: Phenomenal. Thank you, thank you, thank you. This has been a total pleasure. Fun to do a deeper dive into the thinking and how it happened and your why. And I really appreciate this conversation. So I can't wait to get my final copy and see how it's even evolved from when I saw it. the diagrams, all the good things. It'll have a prominent place on my bookshelf, and I can't wait to see the actual copy. So thank you, Kelly. Thank you, Mark.



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Thank you, CJ, for sharing your awesome experience, for taking the time out of your incredibly busy lives to write the book and to have this conversation with me. I think you're a huge gift to Unique Ability Teamwork, to use my framework, and to making work great for people all over the world, making companies better for entrepreneurs and for the people in them. So much, much gratitude. Thank you.

Kelly Knight: Thank you. Shannon, we love you. You are the best.