

EXECUTIVE BOOK SUMMARIES

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THE SUMMARY

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INTRODUCTION

There are two distinct types of leaders in all small businesses: the “Visionary” and the “Integrator.” One sees the future, and the other makes it happen. These two roles could not be more different from each other. That is why it is magic when they work well together. Famous examples include the combination of Walt and Roy Disney at Disney, Henry Ford and James Couzens at Ford, and Ray Kroc and Fred Turner at McDonalds.

This book is a how-to manual for understanding and managing the relationship between a “Visionary” and an “Integrator.” It will help you crystallize the meanings of these two roles and take your company to the next level. You will learn how to utilize this partnership the right way to free yourself up, maximize your potential, and achieve everything you want from your business.

Before we begin, it is important to understand that our core philosophic belief is that all human beings have a God-given set of capabilities—a genetic “Unique Ability” or true skill set. The premise is that all people have one. A Visionary is meant to be a Visionary, and an Integrator is

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meant to be an Integrator. You are either one, or the other, rarely both. When it's structured correctly, the dynamic that exists between these two distinct leadership gifts can be magical.

PART ONE — THE CONTEXT

CHAPTER 1: THE VISIONARY

Are you a Visionary? Has anyone ever called you that? Maybe they see something in you that you don't fully recognize about yourself or perhaps it's something you've always known. A good rule of thumb is that if you match up on 80% of the traits outlined in this section, you are a Visionary.

As a Visionary you are extremely passionate about your product, service, company, and customers. When you look up "passion" in the dictionary, your picture is there. You are very entrepreneurial, a creator, and likely the founder of your firm. Most often we see *external* titles like Owner, Founder, CEO, Chairman, or President. Yet we strongly believe that *internally* referring to roles more by what people do (e.g., Visionary or Integrator) creates clarity and does a much better job of capturing the true contribution of each person within an organization than traditional corporate titles.

As a Visionary, you have lots of ideas. Many of them may not be so good, or at least not a fit with the company's primary focus. Some may even be dangerous. However, a few are absolutely brilliant and those few great ideas keep the organization growing. Those great ideas can take companies to the moon. For this reason, you are invaluable.

As a Visionary, you are very creative. You're great at devising solutions to big problems, not the little practical ones. You are a learner. You enjoy discovering new ideas, learning about them, and figuring out how they can work for the company. When you hit a roadblock, you study to find the answers. You teach visually, drawing diagrams on whiteboards, flip charts, yellow legal pads, napkins, or whatever happens to be within reach. A key value you bring as a Visionary is this ability to discover and figure out new ways to make things work.

You are fantastic with important clients, vendors, suppliers, and financial relationships—the big external relationships. You excel at closing big deals. You are really best at the high level stuff: big ideas and solving problems. The smaller and more detailed things become, the less they interest you. Sound familiar?

As a Visionary, you are great with Research and Development (more "R" than "D") for new products and services. You always have a pulse on the market/industry and even the future needs of clients. You think strategically, always seeing the whole picture and connecting the dots. You see things that others can't. This positions you perfectly to create and champion the company vision. You help the rest of the team understand what's going to be necessary to stay ahead. You are great at turning your best ideas about the future into a vision as long as you don't have to implement any of those plans. Your vision is so strong you are convinced the company can get there. Although you don't yet know

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exactly how, that does not lessen your conviction.

Because of all these amazing gifts, Visionaries are the creators of almost everything. Very little exists on our planet without the Visionaries of the world. They are the 3% of the population that creates two-thirds of the new jobs.

Visionaries are “Hunters,” meaning that you are wired differently than most. You are always in “hunting” mode. Your type of hunting is for ideas, deals, opportunities, and solutions to big problems. If most or all of what you just read describes you, you are a Visionary. Know thyself and be free!

However, with special gifts come special challenges. Visionaries face special challenges. For one, you get bored easily. You have too many ideas, and sometimes your new idea can actually sabotage your best idea. You aren’t good at managing and holding people accountable, typically don’t like details, don’t like running the day-to-day of the business on a long-term basis, and aren’t good at following through. Clearly articulating the details of your vision to others can be quite a challenge and having to repeat it often wears you out.

If you are a Visionary, you must delegate the role of implementing your ideas in order to elevate yourself to your true talents. This will free up your energy to grow your company, protect your culture, and stay three steps ahead of everyone including your competition.

CHAPTER 2: THE INTEGRATOR

Where your talents and the needs of the world cross, there lies your calling, vocation, or purpose—paraphrasing the ideas of Aristotle in *Politics*. It is important to believe that Integrators truly do walk the earth. Making someone else’s vision happen is a very noble calling, vocation, or purpose.

An Integrator’s role and skills are quite unique. For an organization, they are the glue, the Visionary’s right hand; they beat the drum and make sure the trains run on time. You may hear them referred to as #2, inside man, president, COO, general manager or chief of staff. Every organization must have someone playing the Integrator role to truly build a company to the next level. Who is the Integrator in your organization? Are you an Integrator?

An Integrator is a person who has the “Unique Ability” to harmoniously integrate the major functions of the business, run the organization, and manage the day-to-day issues that arise. The Integrator is the glue that holds the people, processes, systems, priorities, and strategy of the company together. A person that has 80% or more of these qualities is very likely an Integrator.

In contrast to Visionaries, Integrators are typically very good at leading, managing, and holding people accountable. They love running the day to day aspects of the business. They enjoy being accountable for profit and loss, and for the execution of the business plan. They remove obstacles so that people can execute. Typically, they operate at a more detailed level than their Visionary

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counterparts. When a major initiative is undertaken, the Integrator will foresee the ripple of implications that will move across the organization as a result. Visionaries typically don't even see, or will substantially underestimate, these ripple effects.

An Integrator is the type of person who is obsessed about organizational clarity. They are great at making sure people are communicating within the organization. Integrators are fanatical about resolution and forcing conclusions. When the team is at odds, they are a masterful tiebreaker. They drive everyone to execute the business plan. They are great at managing big organizational projects. They are masters of follow-through. When priorities need to be set for the organization and everyone must be aligned with those priorities, they are right at home keeping everyone laser focused and driving results. They create organizational focus and accountability.

Integrators have a unique skill to execute a vision. They provide a cadence and a consistency for the team and help them stick with it. Think of the consistent drumbeat on an ancient ship, or the coxswain in a crew shouting "row . . . row . . . row . . ." These verbal cues influence speed, timing, and coordination. They enable everyone to pull together in the same direction. An Integrator is that steady force for the organization.

An Integrator harmoniously integrates the major functions of the business (e.g., sales, marketing, operations, and finance). When those major functions are strong, and you have strong people accountable for each function, healthy tension is created. The Integrator blends that friction into great energy for the company as a whole. At the same time, that creates unity that leads to a healthy, functional leadership team.

Integrators face special challenges. For one, there is no glory. Integrators are the unsung heroes. Many books and articles have been written on Visionaries, but very few on Integrators. Integrators are often deemed as "glass is half empty" kind of people. This accusation most often comes from your Visionary, by the way. A good Integrator is able to poke holes in ideas, opportunities, and potential solutions. As a result, you can come off as being a pessimist or negative. A lot of times you will have to be the bad guy. You have to say "no" often. You are the one who delivers the bad news to employees. You must make the tough calls when the team is divided on an important issue. You are the one who has to filter the Visionary's many ideas.

If you are partners co-running your business, often one of you is an Integrator and the other is a Visionary. If you are both running the business, this usually causes confusion for both you and your people. If you will divide and conquer, you will create clarity, execute better, and reach your goals faster.

CHAPTER 3: THE RELATIONSHIP

The ancient Chinese concept of Yin and Yang describes how two forces seemingly contrary to each

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other—polar opposites—are actually interconnected and interdependent, giving rise to each other as they interact together. They are complimentary forces coming together to form a dynamic system wherein the whole is greater than the individual parts. Both are always present, although one may show up more strongly at any given time. They are always opposite and equal. The Visionary and the Integrator go together in the same fashion. It's the perfect combination that spurs companies to greatness.

In golf, when two partners are playing well together, it is called "Ham and Egging it." When one partner hits a bad shot, the other hits a great shot so they cover each other. This is what a great Visionary/Integrator team does. They Ham and Egg it!

There's no denying that there is a real chemistry when it's right. Just like Rocket Fuel, there's a chemical mixture that happens and the result is a powerful expansion of force. When this force is properly focused, it's literally capable of launching you into orbit.

At this point, it should come as no surprise to you that Visionaries and Integrators, while complementary, as a pair in the business, are quite different as individuals. The polar differences between Visionaries and Integrators mean they are always driving each other a little bit crazy. This is normal but not easy. Imagine if their two personalities were exactly alike. What gain would there be for the organization? It would simply have more of the same capacity. As with electricity, it's actually the degree of difference (+/—polarity) that drives the opportunity for an even greater charge. Polarity creates an electric charge. In the case of a business, polarity energizes creative tension. When harnessed, this leads to a bigger impact. When considering any problem, people who are similar will ask similar questions. Our polarized Visionary/Integrator duo is likely to ask very different questions because they see the problem from diverse vantage points. Varied likes of inquiry lead to better results.

It's not easy to work with your polar opposite but the electricity can be powerful. You also realize that forming a dynamic duo doesn't always work the first time. So what do you do if it flops? You simply try again.

One Visionary founder went through two Integrators before finding the right one. The first was a founding partner who never really carried his weight. This left the Visionary frustrated because he was always carrying a bulk of the Integrator load, yet he procrastinated in making the tough change. After four years, the Visionary couldn't take it any longer and finally made the tough decision. He ended the relationship with his Integrator partner by buying him out.

Next, he quickly promoted someone from within the organization to become the next Integrator. This arrangement also lasted about four years. This time the Visionary himself was the problem. He never gave the new Integrator the autonomy to fully run the day-to-day affairs largely because the person wasn't a true Integrator. This kept them from establishing the necessary level of trust. The

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relationship was destined for failure from the outset. Once again, the Visionary carried most of the weight until he ended the relationship.

Finally, he found the perfect yin to his yang. Not only did his new hire compliment his unique style, this Integrator was tough enough to stand up to him. He had known the person in his industry for many years. They joined forces, and since that “marriage” four years ago, the company has grown 40% each year. The Visionary spends most of his time working on product creation, market research, company culture, and store development.

On the opposite end, we should note that even a great Visionary/Integrator combination doesn’t always last forever. It moves through a cycle which reflects both the growth of the business and the two individuals involved. As the company’s need for Visionary leadership evolves, so will that Visionary’s need for the right Integrator complement. The two individuals may adapt in their evolving roles, right along with the business, or they may not.

PART TWO — THE HOW-TO’S

CHAPTER 4: THE ACCOUNTABILITY CHART

As you know, making any relationship strong takes effort. What we will do is reduce managing your relationship to just a handful of practical disciplines. While they are simple, they are not always easy. However, if you will commit to applying them, they will give you a rich return on your time invested.

The first very important tool is the Accountability Chart. The Accountability Chart will help to create a context for both your Visionary/Integrator relationship and your entire organization. When applied, it goes to the root of most of the issues you face in your Visionary/Integrator relationship.

We want you to see your role as Visionary or Integrator according to where you fit in the Accountability Chart. It will feel restricting at first, and also rigid, but you will come to realize it is not. All freedom comes from laying down boundaries. With an underpinning of structure, you will actually free up creativity and get exceptional results.

In order to lift your relationship and company up to the next level, you must structure your organization the *right* way. The Accountability Chart can create that *right* structure. This is a supercharged organizational chart.

The essential first question is this: What is the right (simplest and best) structure to move your organization to the next level? What is the structure that will get you where you want to go? The Accountability Chart forces you to view your organization in a different way by being intentionally proactive about your structure, rather than reactively adapting a structure to fit your current people. When you see it in this light, you can address issues that have been holding you back.

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The Accountability Chart stems from a fundamental belief that there are only three major functions in any business. These three functions make every organization run. *Sales and Marketing* generates business. *Operations* provides the service or manufactures the product and takes care of the customer. *Finance and Administration* manages the monies flowing in and out, as well as the infrastructure.

It is essential that you believe that all three major functions are equally important. In order to maintain accountability, only one person can ultimately be in charge of any major function within your organization. Only one person oversees Sales and Marketing, only one person runs Operations, and only one person manages Finance and Administration. Often leadership teams will discover they have two (or even three) persons in a single function uncovering one of the root issues for your company's lack of growth (or state of chaos).

This problem must be solved by reducing the number of names in each function down to one. The all-for-one-and-one-for-all approach won't build a solid company. It may have gotten you here, but only clear accountability will boost you to the next level. When these major functions are strong, and you have strong people accountable for each, healthy tension will occur between them. The Integrator blends that friction into greater energy for the company as a whole. In other words, the people heading up the major functions report to the Integrator. Therefore, the Integrator function is above them in the Accountability Chart, and the Visionary is directly above the Integrator. It is important to stress that the Integrator reports to the Visionary.

No two Accountability Charts are the same. When customizing the Accountability Chart for your company, the three major functions might split into more functions. For example, *Sales and Marketing* sometimes split into a distinct Sales function and a distinct Marketing function. *Operations* sometimes splits into two or three distinct functions such as Delivery, Project Management, and Customer Service. *Finance and Administration* can split into as many as four including Finance, Administration, Information Technology (IT), and Human Resources (HR).

A note of caution: please remember that less is more. As leaders, you have an obligation to simplify your organization wherever you can. Depending on the size and state of your organization, you will end up with anywhere from three to seven major functions on the front line of your Accountability Chart.

CHAPTER 5: THE 5 RULES

You need absolute core alignment in your Visionary/Integrator relationship to harness the power of the unique combination. Standing together is critical, as any small gaps between the two of you will show up as canyons to the rest of your team. Once the Accountability Chart and the 5 Rules are firmly in place and being practiced, the rewards for you and your company can be nothing short of astounding.

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RULE #1: Stay on the Same Page

This is accomplished through the Same Page Meeting, which is a scheduled monthly meeting between only the Visionary and the Integrator. Allow two to four hours for the meeting, and always meet somewhere outside the office. Begin by “Checking In” with each other on a relationship level: How are you doing? What sort of stuff is on your mind? Once you’ve both checked in, list all your issues, concerns, ideas, and disconnects. Once you’ve built the full list, then identify, discuss, and solve them. You’ll want to make sure you have allowed enough time to work through all the issues on your lists. It is vital that you do not end the Same Page Meeting until you are 100% on the same page with each other.

RULE #2: No End Runs

At the heart of this rule is an attempt to obliterate situations where either the Visionary or the Integrator is doing things to impede the effectiveness of the other. They may feel very natural and harmless to you, but they can cause great damage. An end run happens when an employee goes around a manager to complain or get a better/different answer to his problem. Unproductive complaining occurs when someone is sharing an issue not to solve it, but is instead politicking, backstabbing, and/or positioning. The person being consulted in the end run can listen and coach, but never make a decision. Instead of cutting the manager in question off at the knees, ask, “Are you going to tell ‘em, or am I going to tell ‘em? Because one of us needs to tell ‘em.” This question will wipe out organization-wide end runs within a month.

RULE #3: The Integrator is the Tie Breaker

How do we know whose authority a given matter falls under? To answer this question, refer to your Accountability Chart. When it’s well constructed, the roles associated with each seat in the Accountability Chart will guide you to identifying the proper owner of any given decision. The basic rule of thumb is that the Sales Leader owns decisions on Sales issues; the Operations Leader owns Operations issues, and so on. The Integrator handles day-to-day cross-departmental bottlenecks by guiding decision making through the Issues Solving Track (“Identify,” “Discuss,” “Solve”). Eight out of ten times, everyone will agree with the solution. However, two out of ten times they won’t, and the Integrator needs to make the final decision. Consensus management does not work. Should the Visionary ever trump a decision by the Integrator? The short answer is yes, although extremely rarely. If the Integrator is consistently making bad decisions, he needs to be fired.

RULE #4: You Are an Employee When Working “in” the Business

If you are a Visionary or an Integrator and also an Owner, you must recognize that your role as an “Owner” is very different from your role as an “Employee.” Too often, a feeling of “owner’s entitlement”

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carries over into the performance of their specific role on the Accountability Chart. As you would expect, this can create tremendous disruption in the organization. Being an Owner sitting in an Accountability Chart seat should entitle you to no more rights than an Employee sitting in an Accountability Chart seat. You must keep these two roles separate and play by the same rules as everyone else in a seat. Note that your only entitlement as an Owner is to receive your share of the profits distributed and to be the ultimate decision maker. If you are not the right person for a particular seat, you should not be in that seat for the greater good of the organization.

RULE #5: Maintain Mutual Respect

As a dynamic Visionary/Integrator duo, you must truly respect each other. This cannot be faked, as your actions will be easily apparent to others in your organization. If you have a lack of respect for each other, you must end the relationship. Life is too short. You must share a high level of trust, openness, and honesty as well. Anything else sends signals to the organization that will chip away at your ability to build a truly great company. Regardless of equity interests, the Visionary should genuinely treat the Integrator as a partner, not as a minion. While the Integrator is accountable to the Visionary, he should not be made to feel "less than." A healthy respectful relationship empowers the Integrator to go forth, practice, and maximize her craft for the greater good. Equally important, this level of respect frees up the Visionary's creativity to do the same.

Natural friction is created between a Visionary and Integrator because they are wired so differently, approaching the world in fundamentally different ways. The stronger and purer the roles, the greater the tension can become. You need to understand this tension is normal and should not be confused with any lack of respect. To combat and endure this friction actually demonstrates your high level of respect for each other.

CHAPTER 6: FINDING EACH OTHER

We don't want to fool you. Choosing an Integrator entails hard work and takes time. Before you begin this important search process, you must make sure you are ready to commit. You must be financially able to afford it, psychologically ready to let go of some control, ready to work fewer hours and ready to be 100% you.

Your first challenge will be finding enough candidates. You may need 150 "leads" to identify ten true "prospects" that will convert to three "qualified" candidates. Hiring a good recruiter can be worth the investment. Networking can possibly bring the right potential candidate to your attention. Don't forget to look inside. In-house recruiting should provide you with great candidates. Someone on your current leadership team might make the perfect Integrator for you. You might be pleasantly surprised by what you find.

We subscribe to the "slow to hire, quick to fire" philosophy, which means you should take your time

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hiring the right candidate. If you do screw up (your gut will tell you if you did), quickly fire them and begin this step again. Making the wrong choice presents you with a great opportunity to sift through what worked, and what didn't, to help you hire better the next time.

When it comes to the question of an Integrator's compensation, there is no one-size-fits-all solution. We wish we could give you one perfect answer but, unfortunately, there isn't one. We see structures all across the board, some with highly variable risk/reward, and others mostly fixed. Some have a substantial equity linkage, while others have none. Just remember that most Visionaries underestimate the proper level of Integrator compensation. You must make sure that your compensation package is competitive.

The first 90 days of any leader's tenure will often make or break their success. You may wish to hire an on-boarding coach for the first few months to act as a sounding board for both you and the new Integrator. This will ensure that everyone is clear on what *success* looks like. It will add some expense to the overall process, but it is well worth the money.

If you choose to manage your own on-boarding, make sure you actively expose your Integrator to your most important stores of knowledge and actively coach him. Help him by finding impactful projects that can be successful within those first 90 days to secure an early win as a perfect context for learning and building a foundation of mutual respect. Actively work through the Accountability Chart and the 5 Rules together to achieve genuine alignment. Be sure to spend time helping your Integrator get to know the other members of the leadership team during those first 90 days.

Based on what you've read, are you an Integrator-at-Large? Visionaries need you. They are "stuck" without you and need you to set them free. When you become part of a Visionary/Integrator duo, the Visionary gets exactly what they crave which is the opportunity to move their vision forward. When you bring your Integrator talents into a relationship with an equally talented Visionary, the payoff can be huge.

When you have an opportunity to connect directly with a Visionary, don't let them intimidate you. They typically look very confident and have strong personalities, but you both know they actually need help and you should feel confident in approaching them.

Imagine asking them questions like these: What would it be like if you had someone you could trust to take your vision and make it happen? What if someone else could execute on all the little details so you could spend more time coming up with the next big idea? Would you like to be able to go away for an extended period and not worry that everything will come crashing down while you're gone?

As an Integrator, you can be their answer to those questions. You clearly have an important place in the world. The even better news is that you are outnumbered 4:1 by the Visionaries out there in need

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of you. You just have to find them.

CHAPTER 7: PATIENCE

We understand all too well the insanity in asking a Visionary to be patient. However, you need to understand what lies ahead when you join forces with an Integrator. A bumpy first year may well be in store for you. You have to take intentional steps toward being patient as you approach that initial difficult period. Take heart! If you enter this process with your eyes wide open and bring disciplined focus to implementing the Accountability Chart and 5 Rules, you will survive the ramp-up stage.

Be patient with your recruiting process. Resist the temptation to let your excitement and anticipation overcome your due diligence during the process. Date a while before jumping into this marriage. In the meantime, you must stay firmly engaged in the role of Integrator until you effectively install your new Integrator. Don't check out. Just suck it up and keep doing it yourself until you have your new Integrator up and running.

You should be aware that some Visionaries never do effectively make the transition. They undertake one or more false starts. Some Visionaries aren't ready. Some will never be ready. Don't let anyone force you to do something you are not ready to do or that simply isn't right for you.

Once you've found your Integrator, an effective on-boarding process will maximize your odds of a successful integration. The first 90 days are critical, so make sure you have committed the resources necessary to build a strong foundation for your Integrator during that period. Most Visionaries are too impatient to let the Integrator focus on asking questions and observing every aspect of the company for a while but do it anyway. The Integrator will actually learn more this way as opposed to jumping in with both feet attempting to learn about everyone and everything while simultaneously running the company.

On average, expect a full year to elapse before your Visionary/Integrator relationship really hits full stride. This is a natural Ramping-Up period. For a few months the Visionary may experience a phenomenon we call "Visionary Remorse." After letting go of some tasks they may have held for a long time, sometimes a Visionary feels they have put out to pasture. They feel they've lost part of their identity and simply aren't contributing at the same level they have for years. This is clearly not the case. Now they are in position to contribute at an even higher level in a way that they are uniquely suited.

Assuming you make it through the One-Year Milestone, and things are working, just keep living by the Accountability Chart and 5 Rules. That will lead you naturally through the ongoing Visionary/Integrator Relationship Cycle of Plan, Execute, Same Page, Align and Repeat.

Unfortunately, sometimes the Visionary/Integrator relationship doesn't work out. Our passionate

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plea to you is this: if it doesn't work the first time, try, try again. Glean every lesson you can from the experience. Deeply consider what worked and what didn't. Conduct a postmortem autopsy on every component of the experience and treat it as a learning opportunity. Sometimes the Visionary is the reason the Integrator failed. Be open to seeing this and don't let your ego keep you from learning that valuable lesson. Then get back up, dust yourself off, and—armed with the wisdom of your firsthand experience—get back to the business of creating the Visionary/Integrator relationship you want.

We love entrepreneurs. We love Visionaries and Integrators. You are our tribe, and our life's work is devoted to helping you get what you want from your business. We sincerely believe the Visionary/Integrator duo is one of the most powerful discoveries for taking a company to greatness.

This is our prescription to help you maximize your Visionary/Integrator relationship. Like many changes that are worthwhile, the path is simple yet not easy. Based on our experience with thousands of companies, though, it works.