

Certified EOS® Implementer Needs Strategic Support™ to Deliver a World-Class Client Experience



A Client Case Study

Client: Certified EOS Implementer

Optimize for Growth
Philadelphia, PA

About Delegate Solutions:

We provide consultative executive support for entrepreneurial leaders and their teams. We help them leverage their time through delegation and provide a dedicated support team to help them create more freedom to do what they love and have a big impact.

Executive Summary

Mark is a Certified EOS Implementer™, who came to Delegate looking to ensure that his clients had a world-class experience with his practice. He wanted to increase his focus time on what he is most passionate about- coaching and helping organizations succeed. His goal was to leverage his time away from client and mentee administrative tasks such as client follow-up, scheduling and management. Mark also recently accepted a new role at EOS Worldwide on the Coaching Team as a mentor. In addition to that Implementing and Coaching, he still had weekly commitments to his existing life sciences consulting business.

We began by implementing a strategic support plan that focused on process improvement. Mark who is naturally process-driven, had many of his processes documented, so our focus was around improving the consistent execution of these processes. We also worked to streamline, organize and optimize his back and front stage client & mentee management systems and had him hand off any and all repeatable tasks.

By delegating management of these crucial templates and tasks, Mark has been able to take a more hands-off approach to his overall client and mentee management experience, and see tremendous success in his work with clients, as well as an improved work/life balance.

Client Challenges

Mark came to Delegate knowing exactly what he *didn't* want to be spending his time on. In order to let it go, he needed to feel confident that if delegated, things were still under control. Managing a caseload of 30+ clients, as well as 50+ EOSI mentees by himself was taking a serious toll on the time he could spend focusing on what he was most passionate about- coaching clients/mentees! He was in search of a reliable team to deliver consistent execution, as well as new, streamlined ideas to execute on his processes with as much automation as possible.

How Our Service Helped

To begin, we reviewed Mark's top goals and priorities and created a customized delegation strategy. Our team then captured process to take over 90% of his client/mentee communication and management. We also supported him with calendar management, A/P and A/R, travel arrangements, and personal tasks.

Shortly after our work began with Mark, EOS introduced new branding guidelines, which required that Mark's website reflect any EOS trademarked material. Our team performed an audit of his extensive website/blog and revised all in compliance with the new branding standards.

As an EOS Certified Implementer™, Mark has responsibilities to report a weekly scorecard to EOSWW. Our team identified this repeatable task, captured the process and began to track and report all of Mark's weekly progress to EOSWW. We also took over management of a complex spreadsheet to manage cash flow projections and client session tracking to help us all stay on top of client progression and EOSWW reporting.

Results, Return on Investment and Future Plans

As our work with Mark continues to evolve, our team is currently helping to build out a sophisticated, automated client/mentee management system within Process Street (with the help of Zapier) in order to free up some of our time to help Mark focus more on business development, as well as working with Mentees.

By using Asana as the primary project management tool to keep track of Mark's clients and mentees, our team follows EOS Implementer™ protocol for all of his clients and mentees, ensuring that: they receive the correct emails at the correct times; they are scheduled for all sessions/meetings in a timely manner; and they are invoiced and sent any necessary materials when necessary. Our team also makes all session reservations and catering orders, as well as handling Mark's travel arrangements when he travels to sessions out of town, or to Strategic Coach or EOSWW Quarterly Collaborative Exchanges (QCE).

Our team runs weekly Level 10™ calls with Mark, where we follow the pure EOS L10 meeting agenda using Traction Tools. This weekly 30-60 minute call allows us to touch base on what's going on, what's been completed, address any issues that need to be discussed, and ensures that we are on track with our individual Rocks (*EOS verbiage for quarterly goals*).

Our team has created process documentation outlining all of the tasks we handle for Mark, as is customary with all processes we deploy for clients. This ensures that the process can be easily repeated or delegated to a team member within the client's organization. This practice is not unique to Mark's organization, but rather something the Delegate Solutions team routinely does with any processes we develop in our work with clients.

Client Testimonial



"I feel I have a trusted team at Delegate that I can rely on to have the moving parts of the business under control while I focus on my Unique Ability activities. I love knowing that things are getting done without my direct involvement. The nagging feelings of balls being dropped is now gone because of their consistent and invaluable help." -- Mark O'Donnell, EOSI

Tools and Technology Utilized

