



ROCKET FUEL™ TOOLKIT

ROCKETFUELUNIVERSITY.COM

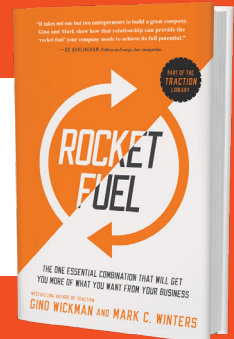
INTRODUCTION

Congratulations on taking a powerful step in propelling your business to the next level! When Visionaries and Integrators™ find their ideal match, they create an unstoppable combination with the energy to take their business to new heights. This energy, aka Rocket Fuel, is incredibly powerful in maximizing the potential of the Visionary, the Integrator, and the business. To make the most out of that energy, you'll need to be well equipped to use it. That's why we've gathered all the tools you'll need to power up your business and packaged them into this toolkit.

When you commit to using these tools consistently, your Visionary/Integrator™ (V/I) relationship will become stronger than ever. Once you each fully understand your roles, working together feels effortless, making every goal achievable.

We invite you to use this toolkit as a starting point and reference on your journey. From here, register to attend free IDS® calls with other Visionaries and Integrators to continue your growth.

Based on the best-selling book, *Rocket Fuel* by Gino Wickman and Mark C. Winters.




GINO WICKMAN



MARK C. WINTERS

THE TOOLS

Use these time-tested tools that have worked for more than 30,000 leaders in every industry to improve your organization's performance and your team's excitement about their work.

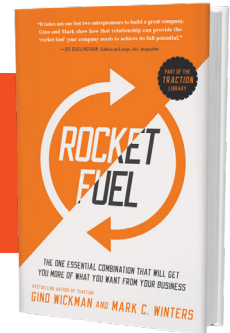
1		OVERVIEW
1		CRYSTALLIZER ASSESSMENT™
2		THE ACCOUNTABILITY CHART™ <i>Page 71 in Rocket Fuel</i>
5		SAME PAGE MEETING® <i>Page 98 in Rocket Fuel</i>
8		OWNER/EMPLOYEE RULES OF THE GAME <i>Page 106 in Rocket Fuel</i>
10		THE CORE QUESTIONS™ <i>Page 152 in Rocket Fuel</i>
14		THE 90-DAY WORLD® <i>Page 161 in Rocket Fuel</i>
16		LEVEL 10 MEETING™ <i>Page 164 in Rocket Fuel</i>
18		SCORECARD <i>Page 176 in Rocket Fuel</i>
20		WRAP-UP

OVERVIEW

Like many worthwhile challenges, creating Rocket Fuel is going to take work. The tools in this toolkit will help you.

They've been tested and proven effective by thousands of companies in harnessing the genetic makeup of Visionaries and Integrators. Our most powerful V/I Duos™ consistently use them to maintain focus on the things they're inherently best at so they can spend their energy doing what is needed most to maximize their business.

READ MORE ABOUT THESE TOOLS IN THE *ROCKET FUEL* BOOK



CRYSTALLIZER ASSESSMENT™

Visionaries and Integrators have different wiring. When they work against their genetic coding and strengths, it can be counterproductive and lead to frustration.

The **Crystallizer Assessment** can help you identify your natural wiring as a Visionary or an Integrator so you can maximize your efforts and lean into what you were born to do.

CRYSTALLIZER ASSESSMENT

For each statement below, rank yourself on a scale of 1 to 5, where 1 rarely describes you and 5 almost always describes you:

1	I am great at taking ideas and effectively initializing plans to make them a reality.	1	2	3	4	5
2	I am constantly generating new ideas. I never run out.	1	2	3	4	5
3	I am adept at quickly identifying and articulating problems, bottlenecks, disconnects, roadblocks and barriers.	1	2	3	4	5
4	I am a great leader. People tend to follow me.	1	2	3	4	5
5	I have an affinity for tackling and creatively solving the biggest, most complex problems.	1	2	3	4	5
6	I get accused of being a pessimist and "hole poker."	1	2	3	4	5
7	I am a great manager of people.	1	2	3	4	5
8	I am highly optimistic in my outlook.	1	2	3	4	5
9	My natural perspective is oriented toward things that are internal to the company. Getting the house in order/ship-shape.	1	2	3	4	5
10	I am the creator of, and champion for, the company vision.	1	2	3	4	5
11	My natural perspective is oriented toward things that are external to the company, big picture or futuristic thinking.	1	2	3	4	5



www.rocketfueluniversity.com
© 2015 - 2022. All rights reserved.

CRYSTALLIZER ASSESSMENT

For each statement below, rank yourself on a scale of 1 to 5, where 1 rarely describes you and 5 almost always describes you:

1	I am not at all (and get a rush out of) being provided with a new vision, and then turning it into something real.	1	2	3	4	5
2	I sometimes find it difficult to translate my vision into something that others understand. They don't seem to get it.	1	2	3	4	5
3	I am really good at translating someone's vision into something others can understand and get on board with. I lay a solid foundation for execution.	1	2	3	4	5
4	I usually have the "right" idea, and know it. It may come from a large volume of different ideas, or a smaller one that I feel strongly about.	1	2	3	4	5
5	I am great at choosing which options are the best priorities for the organization.	1	2	3	4	5
6	I can organize the need for operational policy, structures, and rules to make the vision a reality. I am able to define the rules and put them in place - without slowing down and while improving efficiency.	1	2	3	4	5
7	I have zero patience for putting operational policy, structure, and accountability systems in place.	1	2	3	4	5
8	I really think about the present, what needs to happen now, and how to keep everything on track for the future vision.	1	2	3	4	5
9	I really think about the future of the industry, our product/service, what's coming, and how we can best position the company to take advantage of it.	1	2	3	4	5
10	I am naturally insightful, skilled at deductive reasoning, and highly innovative in thinking of ways to make ideas bigger and better.	1	2	3	4	5
11	I am uncomfortable being held accountable, and holding others accountable. I see the value in creating the infrastructure for accountability across the organization, and am comfortable doing this in place.	1	2	3	4	5

www.rocketfueluniversity.com
© 2015 - 2022. All rights reserved.

CRYSTALLIZER ASSESSMENT

For each statement below, rank yourself on a scale of 1 to 5, where 1 rarely describes you and 5 almost always describes you:

1	I am not naturally analytical, skilled at deductive reasoning, and highly adept at implementing solutions.	1	2	3	4	5
2	I don't like being held accountable, or being told what to do. I find it challenging to establish genuine accountability in my company.	1	2	3	4	5
3	I embrace and enjoy the role of executing and delivering P&L results.	1	2	3	4	5
4	I embrace and enjoy the role of providing leadership, management, and accountability for the company's leadership team.	1	2	3	4	5
5	I embrace and enjoy the role of effectively integrating all the major functions of the organization.	1	2	3	4	5
6	I embrace and enjoy the role of solving the biggest problems faced by the company.	1	2	3	4	5
7	I embrace and enjoy the role of being the engine for big, new, breakthrough ideas, the spark, getting them started.	1	2	3	4	5
8	I embrace and enjoy the role of being responsible for a few large, key, strategic relationships (vendor, client, banking, industry).	1	2	3	4	5
9	I embrace and enjoy the role of effectively resolving cross-functional issues, making sure they are harmoniously segregated and orchestrated.	1	2	3	4	5
10	I embrace and enjoy the role of ensuring adherence to the organization's core processes and operating system.	1	2	3	4	5
11	I embrace and enjoy the role of selling and closing big deals.	1	2	3	4	5

www.rocketfueluniversity.com
© 2015 - 2022. All rights reserved.

The Crystallizer Assessment is a series of 40 statements to rate on a scale of 1 to 5. These carefully curated statements isolate some of the key attributes of a Visionary or Integrator, and by answering them honestly, you can discover your hidden superpower.

Clarifying your role as either a Visionary or an Integrator crystallizes the areas where you can be the most effective while highlighting areas that may be better suited to your entrepreneurial counterpart.

TAKE THE CRYSTALLIZER ASSESSMENT

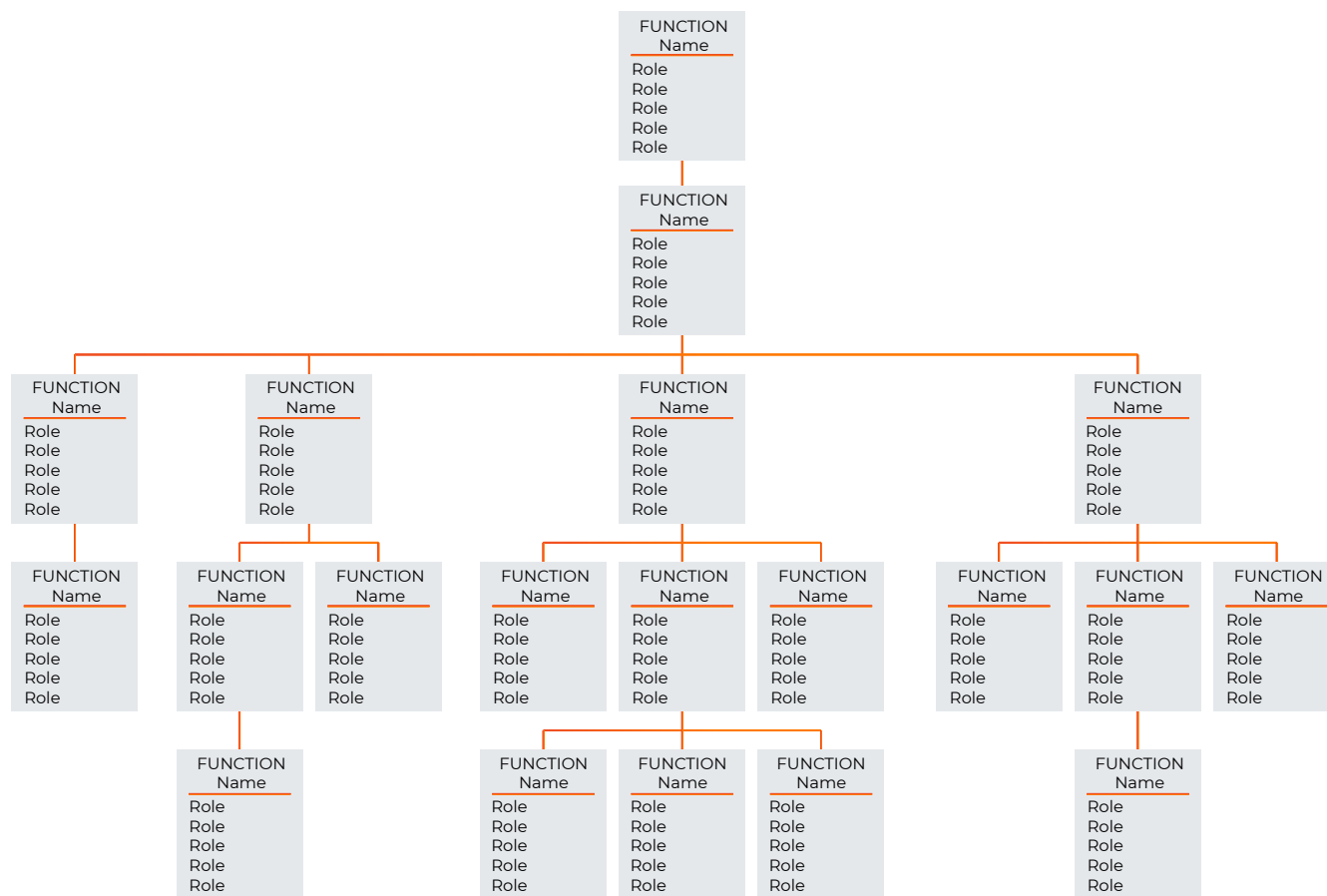


THE ACCOUNTABILITY CHART™

In order to lift your relationship and company to the next level, you must structure your organization in a way that makes your Visionary/Integrator relationship productive.

Without the right structure, owners and leadership team members (including the Visionary and Integrator) may not grasp the full scope of their roles. This lack of clarity can lead to gaps and overlap in accountability and ownership. The Accountability Chart helps to create the right structure by laying down boundaries that free up creativity and help produce exceptional results.

ACCOUNTABILITY CHART



Toolbox
WWW.EOSWORLDWIDE.COM © 2003-2021 ALL RIGHTS RESERVED.

EOS
WORLDWIDE

You must think about and define the key functions (or seats) needed to move your business forward and where they fit into your structure. Those functions and structure may look completely different than what you have in place today.

The Accountability Chart is based on the fundamental belief that every organization has three traditional major functions:

- Every organization has a **Marketing and Sales** function where they go out into the marketplace, create demand, and turn that demand into orders.
- Every organization has an **Operations** function where they build a product, deliver a service, or both.
- Every organization has a **Finance** function where they track money flowing in and out of the organization, deal with financial controls, acquire and manage assets, etc.

These functions and those that fall under them should be tailored to your business's unique needs.



THE ACCOUNTABILITY CHART



The Integrator is the person who harmoniously integrates the major functions of the business and therefore sits above the major functions on The Accountability Chart. The Integrator reports to the Visionary.

The Visionary manages big relationships and comes up with big ideas. The Visionary typically hates getting in the trenches and prefers staying at 30,000 feet. The Visionary sits at the top of The Accountability Chart.

Again, when these two roles are in sync, they become a dynamic duo, creating Rocket Fuel for the business.



- ✓ Once you agree on the major functions in your organization, you need to crystallize the five roles that define each function. These five roles summarize, at a high level, the accountability or job description for that seat. Make sure the roles of the Visionary and Integrator are crystal clear.
- ✓ Now that you've defined the ideal structure for your leadership team, determine which leadership team member owns each major function. Keep in mind that only one person can be in charge of each function.
- ✓ From there, each leadership team member should determine all the seats reporting to them that are critical to their department's functionality and growth, then give each seat a name (title). The goal isn't to capture what it looks like today, but rather what it must look like over the next 6 to 12 months to meet your goals.
- ✓ Next, the leadership team should define each of those seats using the five main roles process they used to define the leadership team's seats. Keep them simple; less is more. This will clarify expectations for the person sitting in that seat.
- ✓ Only once you've illustrated the correct functions at all levels of the organization and their five major roles can you begin adding the accountable person's name to each seat.

The objective here is to create absolute clarity for each direct report, their most important responsibilities and where they should focus their activities.

[DOWNLOAD THE ACCOUNTABILITY CHART](#)

SAME PAGE MEETING™

Rocket Fuel's complementary pair are two distinctly different types of leaders. Each type operates a little differently, and if left unchecked, they can quickly find themselves not on the same page. In order for their relationship to be successful, it's critical that a company's Visionary and Integrator stay on the same page.

The solution is the Same Page Meeting. This scheduled monthly meeting is between the Visionary and Integrator only. It serves to tighten their bond and close any gaps between them so they can be more functional and productive for their organization.

- ✓ 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's your state of mind?" "What sort of business and personal stuff is on your mind?" Remember, the V/I relationship is a sort of "marriage" within the business, so treat it like you would any other relationship of importance.
- ✓ Once you've both checked in, list all of your issues, concerns, ideas, and disconnects. Once you've built the full list, then **identify, discuss, and solve (IDS)** them. You'll want to make sure you have allowed enough time to work through all the issues on your lists.

Follow the agenda on the next page for an effective Same Page Meeting.

SAME PAGE MEETING FACILITATION

- **ONCE A MONTH**
- **2 — 4 HOURS**
- **SAME AGENDA**
 - **CHECK-IN**
 - **BUILD ISSUES LIST**
 - **IDS**
- **MUST STAY ON THE SAME PAGE FOR YOUR LEADERSHIP TEAM**

SAME PAGE MEETING ISSUES LIST

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____

OWNER/EMPLOYEE RULES OF THE GAME

If you are a Visionary or an Integrator and also an Owner, you must recognize that your role as Owner is different from your role as Employee.

Too often, the feeling of “owner’s entitlement” carries over into the performance of their specific role in The Accountability Chart. As you would expect, this can create disruption in the organization. It nurtures the perception of a “Do as I say, not as I do” mentality and promotes end runs, or attempts to circumvent rules or normal procedures.

To address this tendency, you must understand that being an Owner of the business is different from being an Employee in the business.



OWNER'S BOX

When sitting in the Owner's Box, you are playing your role as an Owner. As Owner, you benefit from your share of the profits generated by the company. You set the vision and strategy for the company and make the ultimate decisions.



VISIONARY OR INTEGRATOR

When sitting in your Visionary or Integrator seat in The Accountability Chart, however, you must be accountable for your role and play by the same rules as everyone else in a seat. 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. There is a time and place for each of them.

Note that your only entitlement as an Owner is to receive your share of the profits distributed and to be the ultimate decision-maker on the most important issues. Ownership does not carry with it any right to employment. If you are not the right person for the seat, you should be removed from that seat — for the greater good of the organization.

OWNER/EMPLOYEE RULES OF THE GAME

AS OWNERS "ON":

- The right owner Meeting Pulse
 - Formal board meetings
 - Same Page Meeting
 - Monthly or quarterly
- Straight-line communication (no being vague)
- 50/50 dialogue (listen/let them talk)
- United front "in" the business
- Issues must be solved before bringing them "in" the business (all company issues are fair game)

AS EMPLOYEES "IN":

- United front in the presence of all others
- Integrator makes final decisions "in" the business (any disagreements handled in owner meeting)
- No politics, pulling rank, or end runs with other people
- Complete accountability for the seat/play by the rules (**You can be fired**)

THE CORE QUESTIONS™

In order for you to make good decisions, you must be clear on your direction. And to find the right direction, you and your V/I counterpart must be in complete alignment on the company vision and plan for execution. The Core Questions is a discipline to get you and your V/I counterpart both 100% on the same page.

Core alignment on the answers to each of the Core Questions creates clarity on who you are, what you are, and where you want to go as an organization. Answering these questions will give you an internal compass for guidance through the rough tides you'll undoubtedly encounter along the way.

In addition to having this internal compass to guide you, you will avoid 80% of the potential symptomatic “disconnects” that occur by not being 100% on the same page with each other. While it is vital that you and your V/I counterpart are on the same page with the following questions (that is priority one), we strongly recommend that you engage your full leadership team in answering the following questions as well. This will create more buy-in from the team and produce an even better quality of work.

QUESTION 1:

What are your core values?

These define who you are as a person and who you are as an organization. They create your culture, your guiding principles, and the rites of passage into your organization.

QUESTION 2:

What is your Core Focus™?

This is your company's sweet spot. Where do you excel? What do you love doing? What are you great at doing? What are you passionate about? The answer to this key question becomes a filtering and guiding mechanism for you when making decisions.



QUESTION 3:
What is your 10-Year Target™?

This defines the number one long-range goal for your company.



QUESTION 4:
Who is your ideal customer and what is the most appealing message to them?

Trying to do everything for every potential customer or client is a formula for organizational suicide. You should decide exactly what you're selling in a short, sweet, and simple message and decide who your ideal customer is for that product or service.



QUESTION 5:
What is your 3-Year Picture™?

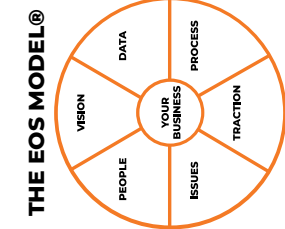
This is a vivid picture of what your company will look like in three short years.



QUESTION 6:
What is your 1-Year Plan?

Bring your long-range vision down to the ground and make it real. That means deciding on what you must accomplish this year.

For those of you who already run on EOS, these questions may sound familiar, as they make up the basis for your **Vision/Traction Organizer™ (V/TO™)**.

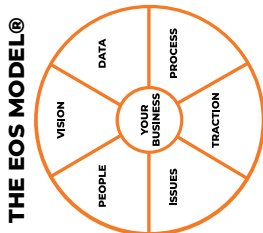


THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME: _____

VISION _____

CORE VALUES	1. 2. 3. 4. 5.	3-YEAR PICTURE™
CORE FOCUS™	<p>Purpose/Cause/Passion:</p> <p>Our Niche:</p>	<p>Future Date:</p> <p>Revenue:</p> <p>Profit:</p> <p>Measurables:</p> <p>What Does It Look Like?</p> <p>.</p> <p>.</p> <p>.</p> <p>.</p> <p>.</p> <p>.</p> <p>.</p> <p>.</p> <p>.</p>
10-YEAR TARGET™	<p>_____</p> <p>_____</p> <p>_____</p>	
MARKETING STRATEGY	<p>Target Market/"The List":</p> <p>Three Uniques™: 1. 2. 3.</p> <p>Proven Process:</p> <p>Guarantee:</p>	



THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME: _____

TRACTION

1-YEAR PLAN	ROCKS	ISSUES LIST
Future date: Revenue: Profit: Measurables: Goals for the Year 1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____ 7. _____	Future date: Revenue: Profit: Measurables: Rocks for the Quarter 1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____ 7. _____ Who _____ _____ _____ _____ _____ _____ _____	1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____ 7. _____ 8. _____ 9. _____ 10. _____ Prioritize • Identify • Discuss • Solve

THE 90-DAY WORLD® / QUARTERLY ROCKS



With about 90 days in a quarter for the year, setting short-term priorities each quarter and reconvening and reassessing those priorities at the beginning of each quarter is key to reaching big goals. Hence, the 90-Day World.

Now that you have a clear vision and structure in place, you're ready to establish short-term priorities. Working relationships start to fray about every 90 days. Sixty days is too soon, and 120 days is too long. Rather than be overwhelmed by the monumental task of accomplishing your 3-Year Picture or 10-Year Target, this 90-day view enables you to break the longer-range targets down into bite-size chunks and focus on making it to the end of the quarter.

In the 90-Day World, you must establish only the **three to seven most important priorities for the company**, the ones that must be done in the next 90 days. You can call these terms anything you'd like, but we prefer the term "Rocks" (90-Day Priorities) made popular by Verne Harnish, who borrowed it from Stephen R. Covey's time-management illustration in his book *First Things First*.

Once your vision is clear, you will set better Rocks. To **establish your Rocks**, you must meet every 90 days. You and each member of your leadership team should have Rocks. The reason to limit Rocks to three to seven is to break the habit of trying to focus on everything at once. It simply can't be done. By limiting priorities, you can focus on what is most important. Remember the old saying "When everything is important, nothing is important."

The way you move your company forward is one 90-day period at a time, setting Rocks that create a short-term focus. To the degree that you concentrate everyone in one direction, you'll gain the power and focus of a laser beam and gain faster traction toward your goals.

QUARTERLY ROCKS

Who

1. _____
2. _____
3. _____
4. _____
5. _____

Name

- | | | |
|----------|----------|----------|
| 1. _____ | 1. _____ | 1. _____ |
| 2. _____ | 2. _____ | 2. _____ |
| 3. _____ | 3. _____ | 3. _____ |
| 4. _____ | 4. _____ | 4. _____ |
| 5. _____ | 5. _____ | 5. _____ |

LEVEL 10 MEETING™

With the weekly Level 10 Meeting, you will achieve a communication discipline we refer to as “keeping the circles connected.” Imagine two rings side by side, not unlike the large steel rings that magicians somehow amazingly link and unlink in that popular illusion. Each ring represents one part in your V/I Duo. The objective is to keep you connected without letting you get too far apart (disconnected) or having you overlap too much. By keeping the circles connected in your V/I relationship, you stay in sync and eliminate the potential relationship issues that can occur when your circles are disconnected.



Most business meetings are inefficient and not productive. On a scale of 1—10, of the thousands of leaders we've asked, most have rated their meetings a 4. By implementing the discipline of a weekly Level 10 Meeting, you will raise that rating to a 10. The Level 10 Meeting Agenda is designed to keep your V/I relationship and leadership team focused on what's most important on a weekly basis. Nothing is more important than keeping your numbers on track, your Rocks/90-Day Priorities on track, and your customers and employees happy. The Level 10 Meeting is the most effective and efficient way to accomplish that.

A weekly Level 10 Meeting keeps you focused on what really needs to be done, helps you spot developing problems, and then drives you to solve them. What makes for great meetings is solving problems.

Patrick Lencioni says it best:

“Your meetings should be passionate, intense, exhausting, and never boring.”



THE LEVEL 10 MEETING™

THE WEEKLY AGENDA

Day: _____

Time: _____

AGENDA

Segue	5	Minutes
Scorecard	5	Minutes
Rock Review	5	Minutes
Customer/Employee Headlines	5	Minutes
To-Do List	5	Minutes
<i>Placeholder for additional agenda items</i>		
IDS	60	Minutes
<i>Placeholder for additional agenda items</i>		
Conclude	5	Minutes
Recap To-Do List		
Cascading messages		
Rating (1–10)		

SCORECARD

According to an old business maxim, anything that is measured and watched is improved. The concept of managing a Scorecard has been around for a long time. It's been called many things, but whatever the name, it contains a handful of numbers that can tell you at a glance how your business is doing.

The Scorecard is how the Integrator remains accountable and how the Visionary keeps a finger on the pulse of the organization. This powerful tool enables both of you to truly let go and focus on the things you do best.



SCORECARD

DASHBOARD, FLASH REPORT, METRICS, PULSE REPORT,
KEY PERFORMANCE INDICATORS (KPIs):

THE 7 TRUTHS – YOU MUST BELIEVE THAT:

1. What gets measured gets done
2. Managing metrics saves time
3. A Scorecard gives you a pulse and the ability to predict
4. You must inspect what you expect
5. You *can* have accountability in a culture that is high in trust and healthy
6. A Scorecard requires hard work, discipline, and consistency to manage, but it's worth it
7. One person must own it

THE 6 FUNDAMENTALS:

1. Review weekly with your leadership team
2. 5–15 numbers
3. Someone accountable for each measurable (who drives it?)
4. There is a goal for each measurable
5. If the goal is not hit, you “drop it down”
6. 13 weeks at a glance (patterns and trends)

YOU'RE ON AN ISLAND...

COMPANY SCORECARD



WRAP-UP

That's a wrap on the toolkit, but it's definitely not the end of the road. Remember to reference this toolkit along your journey. Putting this toolkit into practice will help eliminate many of the frustrations and issues holding you back from maximizing your business.

[PRINT THE ENTIRE TOOLKIT](#)

Utilizing these eight simple tools will strengthen your V/I relationship, allowing you to lead your business as a united front to heights up and above what was previously possible.

Beyond this toolkit, there are many additional resources available within the Rocket Fuel University for Visionaries and Integrators who are committed to continually deepening their commitment to their craft and getting the most out of their business.

ENROLL IN ROCKET FUEL UNIVERSITY

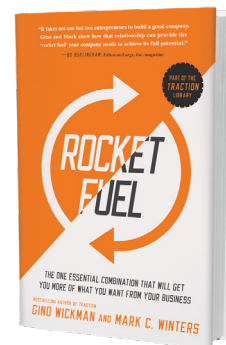
- ✓ Participate in monthly Visionary and Integrator IDS calls
- ✓ Crystallize your role with the Crystallizer Assessment
- ✓ Get your V/I Duo on the same page with the Rocket Fuel Power Index
- ✓ Progress toward Integrator mastery as a member of the Integrator Mastery Forum™

CONTACT US

1.877.EOS.1877

rocketfueluniversity.com

support@eosworldwide.com



[GET ROCKET FUEL](#)





ROCKETFUELUNIVERSITY.COM

© 2023 by Gino Wickman and Mark C. Winters. All rights reserved.

No part of this toolkit may be used or reproduced in any manner whatsoever without written permission except in the case of brief quotations embodied in critical articles or reviews.

The 8 Questions, Core Focus, 3-Year Picture, Five Leadership Practices, Five Management Practices, Meeting Pulse, Level 10 Meeting, Issues Solving Track, LMA, People Analyzer, GWC, Delegate and Elevate, EOS Process, Quarterly Conversation, Clarity Break, and 5-5-5 are trademarks of Gino Wickman.

90-Day World, EOS, and The Entrepreneurial Operating System are registered trademarks of Gino Wickman.
All rights reserved.