

# BOS-UP

## Your Business

Optimize Your Potential with  
a Business Operating System

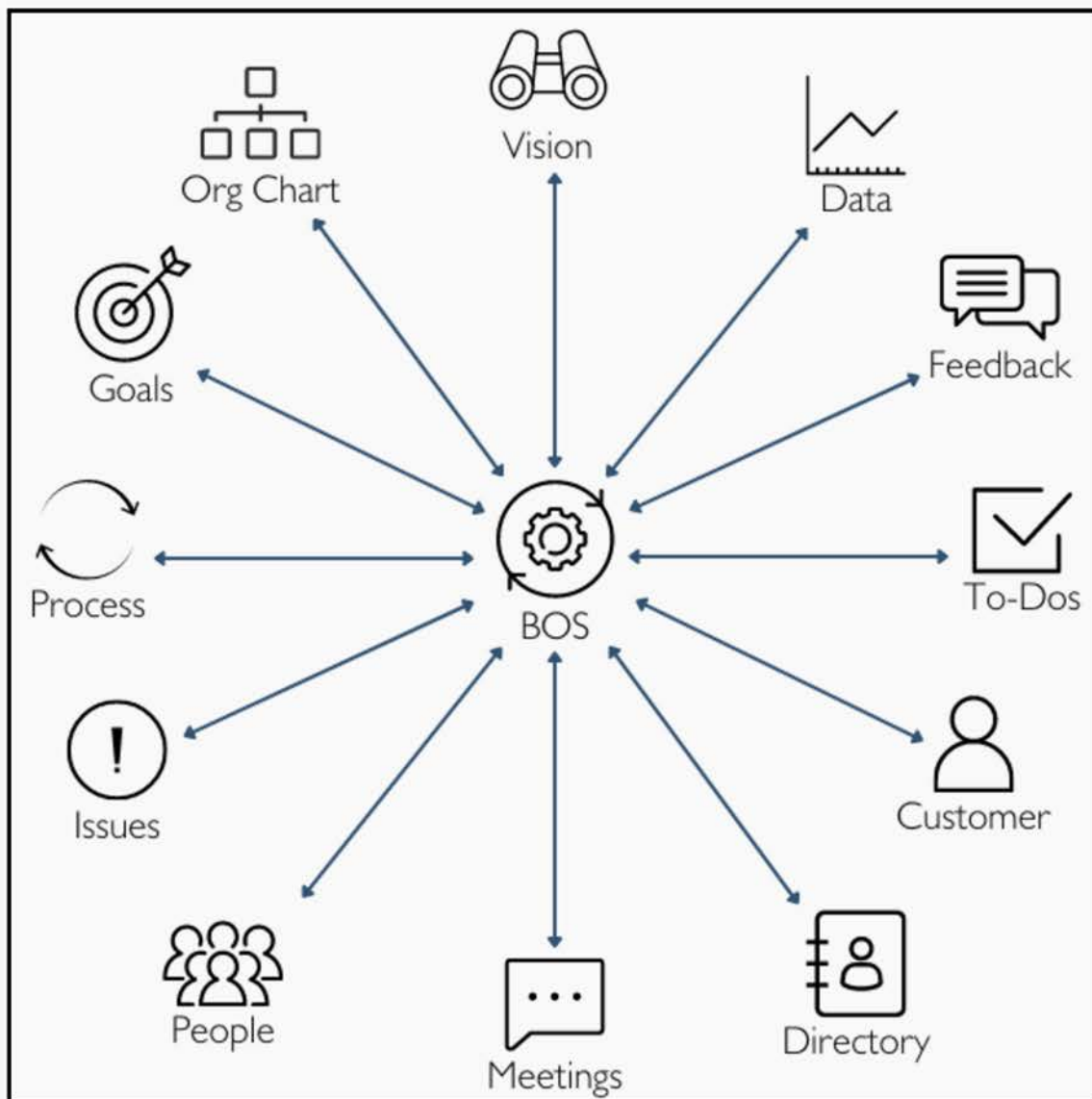


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[www.bos-up.coach](http://www.bos-up.coach)

# Business Operating System



A cohesive **business operating system (BOS)** provides the essential framework to define, establish, manage, and validate your operations. With a BOS in place, the entire organization is focused on the company's vision and objectives, promoting consistency and alignment. It provides much-needed structure, validating your company's goals and defining your future trajectory. Effective leadership, management, teamwork, and accountability are among the many benefits of implementing a great BOS.

A structured BOS can significantly benefit any start-up or small business by keeping information organized, streamlining processes, and serving as a centralized system-of-record. It also serves as a virtual workplace, facilitating remote operations and collaboration. Above all, a great BOS can drive success by promoting organization and alignment, empowering your business to build, run, and scale effectively.

# Aspirations & Benefits

What are your reasons for implementing a business operating system?

- ☐ Healthy Accountability - ensure everything is accounted for
- ☐ More Control - get, be, and stay completely in charge
- ☐ Greater Production - consistent efficiency and effectiveness
- ☐ Fewer Issues - turn your challenges into opportunities
- ☐ Extra Time - freedom to do what you want, when you want
- ☐ Better Focus - avoid distractions and do work that matters
- ☐ Defined Processes - document your standard operating procedures
- ☐ Stronger Teams - put and keep the right people in the right seats
- ☐ Consistent Profits - stronger sales, margins, and cash flow
- ☐ Fulfillment - more happiness in business, work, and life



# Company Assessment

For each of the following, please rate your company on a scale of 1 (bad) to 5 (great).



Leadership

Your **Vision, Identity & Goals** are clear, substantiated & understood:



Your **Core Values** are known, embraced & embodied by all employees:



Management

Your **Processes (SOPs)** are clearly documented and followed by all:



You have **Scorecards** that set, track & validate your Leading KPIs:



Teamwork

Your **Weekly, Quarterly & Annual Meetings** are productive & timely:



You know how to tackle your **Issues** in a professional and productive way:



Accountability

Your **People** are the right fit for the positions they hold:



Everyone in your organization is aware of their respective **Responsibilities**:



# Company Assessment

Add your scores from the previous page:



Leadership \_\_\_\_\_/10



Management \_\_\_\_\_/10



Teamwork \_\_\_\_\_/10



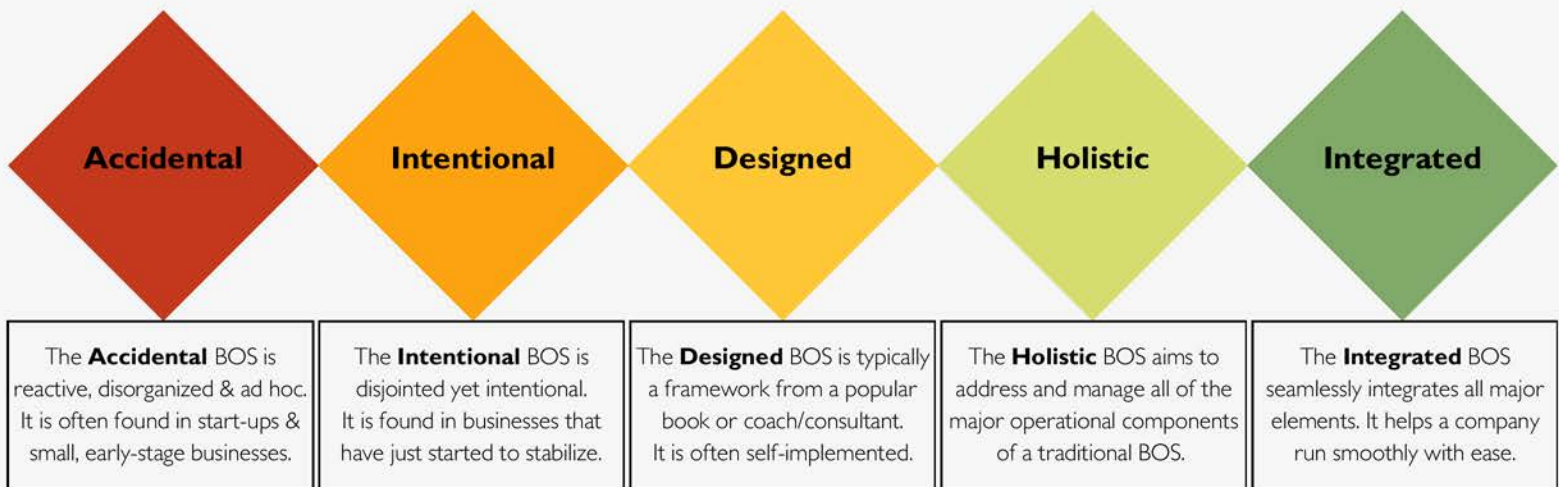
Accountability \_\_\_\_\_/10



## Your Business Operating System

A business operating system (BOS) is the way your company operates on a day-to-day basis.

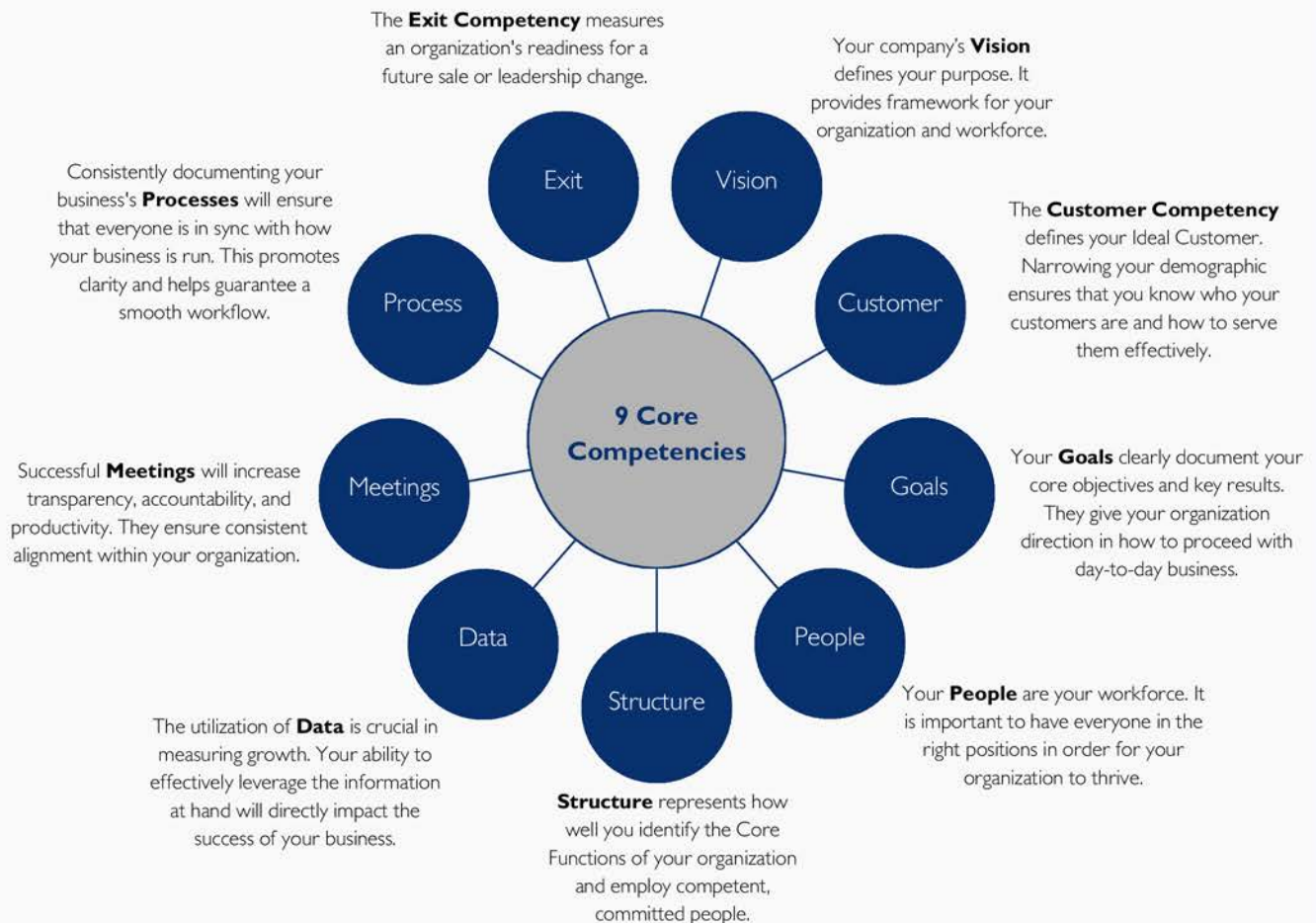
Whether you know it or not, you have a BOS. Which of the following represents your company?





# Concepts, Tools & Disciplines

To achieve sustained success in business, it's vital to master the essential concepts, tools & disciplines that align everyone towards unified goals. This allows you to step away from your day-to-day business and work on the overall health of your company. The **9 Core Competencies** are the time-tested and essential concepts that when focused on, allow you to build a successful company.



Incorporating the essential **concepts, tools & disciplines (CTDs)** into your business will help you accomplish your objectives while overcoming significant hurdles. While these ideas might seem straightforward in theory, it can be difficult to integrate them into your routines.

List any **concepts, tools, or disciplines** that you are currently using.



# Structure

Establishing a sound organizational structure is essential for any company. Ultimately, successful companies have the right personnel in appropriate positions and can maintain employee retention over an extended period. While each person possesses their unique strengths, ensuring that they are in the right role and are accountable for the right responsibilities is pivotal to your overall success.

In addition, transparency is a vital aspect of any organization, and it's crucial for everyone to know the responsibilities of their colleagues. The Core Function **Org Chart** comes in handy by highlighting every individual's Function across the company, allowing for seamless communication and promoting accountability. Unlike a typical Org Chart, which focuses on job titles only, a Core Function Org Chart emphasizes the roles and responsibilities of each employee, eliminating hierarchical bureaucratic clutter.

The **People Competency** also encompasses learning and development. According to the Society for Human Resource Management (SHRM), losing an employee costs 6 to 9 months of their salary. Providing regular feedback through weekly meetings, quarterly conversations and annual reviews not only supports your workforce but also provides vital feedback to the employees and the organization.

"Train people well enough so they can leave. Treat them well enough so they don't want to."

- Sir Richard Branson





## Define Your Responsibilities

Discovering your Responsibilities is one of the first steps in creating a structured Core Function **Org Chart**.

Write down a list of what you (and only you) are responsible for in your company.

List all of the Functions (ie. sales, marketing, finance, operations etc.) within your business.

For each Function, write down 3-5 specific roles, accountabilities & responsibilities.



# Goals

Setting tangible goals is essential in providing direction and generating traction for your business. To establish effective goals, it's necessary to create a balance of long-term, mid-term, and short-term objectives. Long-term goals should be viewed as a destination, while mid and short-term goals serve as the roadmap. It's crucial to ensure that your goals are focused and attainable, meaning that a few specific, measurable, achievable, relevant, and time-bound (**SMART**) goals are preferable to many scattered ones.

# Set Your Goals



Think out 5-10 years in the future. Write down the **Compelling and Audacious Goals** that you would like your company to accomplish in the long-term.

What do you want to achieve within the next 3 years to reach your long-term goals?

What do you want to accomplish within the next year to reach your 3-year goals?

What do you want to complete within the next 90 days to reach your 1-year goals?





# Data

Monitoring Data in your organization is vital to validate that the day-to-day business is running smoothly. It is imperative that you track actions and activities that deliver results. Key performance indicators (KPIs) are the metrics that one uses to track data, and it is important to use leading indicators in order to forecast, anticipate, and predict changes in your business. It is best to track data weekly and use rolling 13-weeks to see patterns and trends. Ideally, there should be three to five key measurables for each Function, and they should be specific, measurable, achievable, relevant, and time-bound (SMART).



# Establish Your Data

The most vital KPIs within your business are the ones that track the important actions and activities. These are called “Leading Indicators.”

1

List the key KPIs/Data that you currently track:

2

What KPIs (that you currently track) measure performance before an event has occurred (ex: customer lifetime value, product development time, etc.)?

3

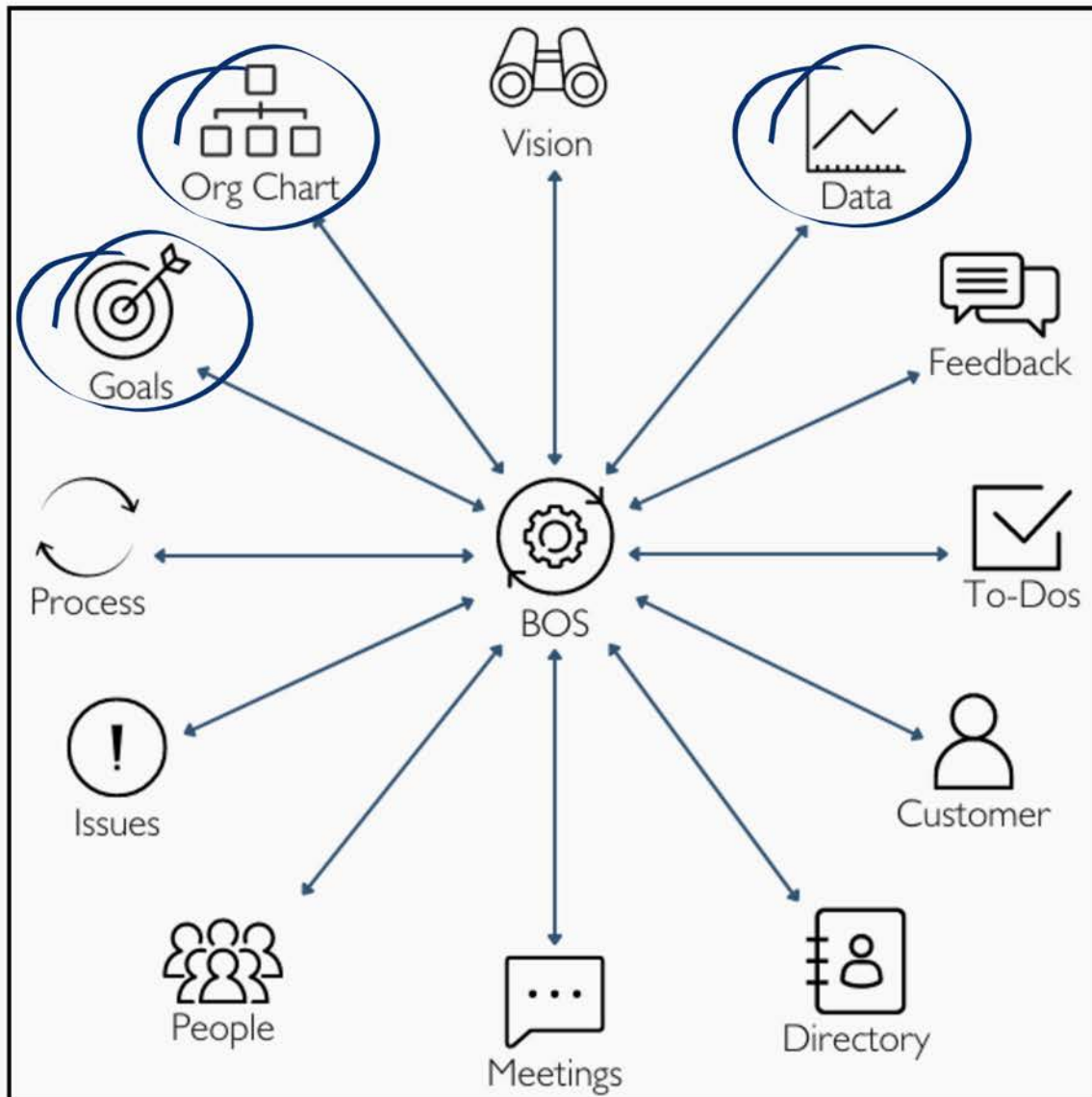
What KPIs (that you currently track) show your past performance (ex. sales, profit margins, active customers, etc.)?

4

What KPIs can you add to help you better measure results?



# Business Operating System



This guide provides insights into several essential concepts, tools, and disciplines that constitute a business operating system (BOS), including responsibilities, goals, and data. While these elements are fundamental to the success of your organization, they represent a fraction of the benefits a BOS can offer. To leverage the full potential of a BOS, you must incorporate a range of other concepts, tools, and disciplines. Ultimately, this approach will help you to build, run, and grow a successful company.







# Next Steps

Thank you! We hope you find this helpful.

If you would like additional information about implementing a business operating system into your company and would like more information about connecting with a coach, please visit **[www.BOS-UP.coach](http://www.BOS-UP.coach)**.

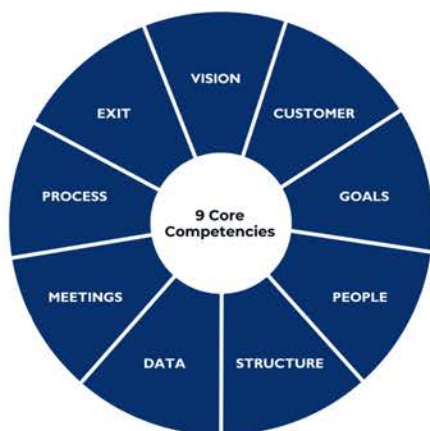


# The **modern, flexible, and collaborative** way to **learn, implement, and benefit** from a **Business Operating System**

**BOS-UP.  
COACH**

Are you the owner of a **Startup** or **Small Company**? Do you want to optimize your best vision, productivity, and results? If so, **BOS-UP®**, in partnership with **Ninety®**, can help. Through a blend of coaching and software, we empower leadership teams to build, run, and scale resilient companies. We do so by helping you implement and benefit from a custom-tailored **business operating system (BOS)**.

Founded in 2016, Ninety is a venture-capital backed software company with over 300K users in more than 50 countries. Through our credentialed coaches, BOS-UP helps our clients leverage the features and functions of Ninety along with the essential concepts, tools and disciplines it takes to succeed in business.



## **Benefits of a BOS-UP + Ninety Solution:**

- Harness the competencies that help generate accountability.
- Formalize a clear and concise vision and operating structure.
- Set, track & ensure realistic measurables (i.e. OKRs & KPIs).
- Streamline operations, performance & Core Processes.
- Establish and verify roles, accountabilities, & responsibilities.
- Maximize meeting effectiveness, communication & collaboration.
- Create a positive company culture where people feel appreciated.
- Confidently manage & leverage a hybrid or virtual workplace.

## **Starter Program** (1-day intensive workshop session)

Using our interactive Guidebook, you will learn the primary features, functions, and benefits with Ninety while simultaneously setting up and customizing your Ninety account, so that you can use it immediately.

## **Builder Program** (3 full-day sessions, over 60-90 days)

In partnership with your BOS-UP Coach, you will learn, develop, and implement a custom Ninety solution along with the essential concepts, tools, and disciplines needed to run, build, and grow a great company.

## **Scaler Program** (7 full-day sessions, over 10-13 months)

Includes all of the elements from the Builder Program, as well as 2 full-day Quarterly Sessions, one 2-day Annual Session, and 1-1 business + executive coaching, skill development, and team building.

If you are ready for a comprehensive and programmatic solution to help you effectively learn, implement, and benefit from an innovative, custom-tailored business operating system - BOS-UP is here to help you.

To learn more and get connected with a BOS-UP Coach today, please visit **[www.BOS-UP.coach](http://www.BOS-UP.coach)**.

