
Jaime: Welcome to Eventual Millionaire. I am Jamie Masters, and today on the show, I am grateful, grateful to have Mark Winters, who ran Rocket Fuel. We had Gino Wickman on a few days ago, and I wanted to ask him a million questions on Rocket Fuel because it is one of my favorite books, and he introduced me to you. Thank you so much for coming on the show today, Mark.

Mark: My pleasure, Jamie. I'm excited to be here.

Jaime: I tried to bombard him. So, now, I'm just gonna bombard you for some of these questions. So, first of all, if anyone hasn't read it, make sure you go out and grab the book because we're gonna try and get a little detailed here. So, if you need the premise, make sure you go do that or check out his site, markwinters.com, for the videos because you've got some really great videos. But I wanna dive right in. Can you just sort of describe what a visionary and integrator is to sort of set the stage for everyone?

Mark: Sure. So, the visionary is probably a person that most your audience is gonna already be familiar with. They may be the visionary. They're the entrepreneurial wired person or, typically, the founder. They're the one that has this entrepreneurial seizure, as we like to call it, where, all of a sudden, they've got this idea that's too good to resist. And they jump in, and they start a business. And they have ideas of the impact they're gonna have with it, the money they're gonna make, all this free time that they're gonna have.

And then they get into the experience, and, a lot of times, you fast forward 12-18 months, and, if you could peak in on them, they might not look like they thought they would look when they started that company. And so, that cries out for this other role that we call the integrator. And the integrator is just wired completely different than that visionary entrepreneur. They're much more focused on details and action and follow-through and actually getting things done. So, you can think of the visionary is the one that sorta makes things up, and then integrator's the one that actually makes them happen, makes them happen consistently, makes them real in the world. And when you put them together, it's just a super powerful combination.

Jaime: Well, and anytime I talk to any visionary type entrepreneur – whatever we wanna call them – CEO – I say what an integrator is, and they're like, “Oh my gosh, I need one,” or, “I need mine to be better,” or whatever those pieces are. But I also know it sort of

costs a lot to have a really, really amazing integrator. So, what sort of size company are we talking about, and who should be getting an integrator?

Mark:

Yeah, so, it really varies. So, our sweet spot, the way that we talk about it is a company that has 10 to 250 employees. So, they're sort of in that curve where they're not just doing it all themselves. They've got a team. Now, they're really starting to think about building a leadership team around them, and that's when the integrator can really help them a lot because they're working through and between those different leaders to help keep them together, keep them aligned, keep them pointed at the right thing. So, wherever that hits you. Now, one thing that's interesting is you'll see companies that they really wrestle with this financial decision.

And in the book, we talk about readiness factors, and financial readiness is one of those. So, you've gotta be able to get your head around, you know what, I'm gonna be able to get more out of this than it's gonna cost me. And so, there's different techniques. One is just looking at all the things that are kinda stuck, all the different issues that you're wrestling with and trying to think about which ones of those would actually get solved or get moving if you had that integrator on the team and add up the economic impact of that. And a lot of times, when a visionary goes through that exercise, they see pretty clearly, wow, I'm gonna get a lot more out of this than what it's gonna cost me.

And so, eventually, they kinda make that move, and they're off and running. In between, there's sort of a model that's emerged that we'll talk about as a fractional integrator. And so, that's where you cannot make the full investment to bring somebody on full time that, maybe, is super experienced, but bring somebody in for even a day a week. Even just a little bit of help, a lot of times, can really make the difference, and it can sorta show you a picture of, okay, this is what's possible. This is how it could work. And some of those relationships are almost like dating. It's like trying somebody out. It's getting to know them.

And then, as the trust develops and you get more comfortable working with somebody in that role, then it goes from one date to two dates to whatever. And the next thing you know, they're growing, and they can see it, and they can get ready, and they can engage and make that a full-time agreement. Now, Jaime, what's interesting is, after we watch people go through that cycle and

they've been successful with an integrator and then – maybe, they sell the company, or they do something where they're ready to start another company. What's interesting is to watch these folks. When they start out, sometimes the integrator is their first hire. And so, their mindset – they've sorta had this breakthrough. And at that stage, they start with an integrator from the jump.

Jaime: Well, so many questions in this. So, No. 1, the 10 to 250, does that include contractors? I know, in general, people, now, are going full time, but sometimes people have really high-level contractors that have been with them for a long time too.

Mark: Yeah, so I like to think of it just as people – whether they're W-2 or 1099, it doesn't matter. If it's a person that you're relying on as part of your team, and you're giving them direction, and you wanna hold them accountable, I would count them in that number.

Jaime: Great. Yeah, that's the thing that I've found. So, when I get into businesses, it's like they have some sort of EA, potentially, and then they're trying to manage people, but they suck at managing people. It starts to get really wobbly really quick at the beginning. So, if someone is looking for a fractional integrator, is that what they call it? Are they calling it something else? How do we get them?

Mark: So, we're seeing the term fractional integrator broadly. After we wrote the book, we started to see people change the tagline on their LinkedIn from whatever to either be just integrator, or they might include integrator with a string of like COO, general manager, presidents, sometimes, or whatever. But it's kinda that role. And then, yeah, fractional, it feels like, has become a pretty well-understood term because we've got fractional CFOs, fractional marketing folks. You got fractional everything. And so, those two have kinda gone together. So, yeah, I would search on that term, and you'll find lots of options out there.

Jaime: What about when a company is growing and they don't have an integrator yet, but they wanna promote from within? So, what types of positions are – maybe they don't have an operations person, solely. Maybe they just have an EA or a project manager. Who would be a really good fit to move up into the integrator role?

Mark: Yeah, so it's a function of not necessarily where they are, but what their capabilities are and how they're really wired. And so, we have some assessments on the site. And so, I would really

encourage folks to go and take the visionary/integrator assessment and see how they're wired. And we're trying to create – we talk about it as a two-piece puzzle between the visionary and the integrator. So, it's really understanding that for a specific visionary that's looking. They might come from anywhere. They really could be in any function. But think about the roles that are more project-oriented, more process-oriented, working with more detailed stuff where they're really kinda following through. It's not, typically, your big outgoing sales hunter-type profile that likes to be free willing and loose and running.

Super important. Gotta have it as that energy in your company, but they don't like to be necessarily focused in on the things that the integrator needs to be focused in on. So, I would have people that you think have those capabilities. Get them to take the assessment and just kinda see how it matches up. Starts, though, with the visionary taking that assessment and seeing how they're wired, really. So, you gotta look at yourself first to see what the shape of your edge is so you know what you're trying to match up with.

Jaime: Yeah, almost everyone I talk to is like, “Yeah, I'm big-time visionary, like ADD all over the place.” And we need someone to hold us accountable. So, when we start moving somebody into that role, how do we actually start training them for the pieces? Because I know the integrator – I actually found one on your website with sort of a vague job description. How do we figure out exactly what the job description is for the new role?

Mark: Yeah, so we have a job description, and, to develop that, we used a lot of folks that had experience as integrators, with integrators, having integrators working for them. And so, it's a pretty good start. So, I encourage people to begin with that. Again, they can get that from the site. It's in the book as well. And then just adapt it.

So, it's all about looking at yourself, thinking about what you need, and then trying to find – basically, write the recipe for what the other side of that two-piece puzzle is, and then that's what you go out and look for either in your own company or out in the world. You start to tell your friends and tell other people in your network, “Hey, I'm looking for one of these, and this is kinda what they gotta have. This is what they gotta look like,” and then you'll be amazed that people will help you find them.

Jaime: I love this. Okay, so many more. So, let's say we did actually find somebody within the organization, but then changing sort of the

org. chart, moving it around, I feel like a lot of entrepreneurs have issues going, “Well, wait. If we move this person there, then we have to do this, or we have to rename this job description.” There’s just a lot of potential and not a lot of clarity when it comes to that. What do you suggest for people in that role?

Jaime:

So, one of our foundational tools – and this is an EOS tool. And of course, you talked to Gino, probably, a little bit about EOS, the entrepreneur operating system. But it’s called the accountability chart. And so, you can think of it – everybody knows about org. charts. Accountability chart is a simplified and very powerful version of an org. chart. And the reason it’s simpler is because we kinda strip away the titles. We’re not worried about levels and stuff. What we’re really worried about is, what needs to be done in the business? And so, if you think about your business sorta from a white-sheet perspective and say, “All right, this needs to be done.

We can kinda cluster these things together in roles that seem to make sense that a person would do this stuff,” and you lay them out in a chart where there’s clear one-to-one accountability between each set of roles for each set of responsibilities. And so, we don’t need to put a title on there. We don’t need to put executive blah, blah, blah, associated director of blah, blah, blah. It’s just, this person does sales. This person does operations. This person does customer service or whatever it is. And then you have the specific roles under there and who they’re accountable to. So, from that perspective, we move somebody, let’s say, from a role in the organization to fill the integrator role.

Well, the integrator role was a new role, maybe, in your scenarios. So, that’s new. So, we got them there. In the accountability chart structure, we actually leave open the possibility that someone may sit in more than one seat in that accountability chart. So, in the transition, they may still sit in that other role for a while, the one they were in, and they take this one on too. And then, as it grows, it begins to become too much, and then you’ve got a decision to make. You know what, we really need to get some help here. So, let’s bring in somebody to kinda backfill for them there.

But it’s a very intentional structure to go about designing what, really, is something that’s gonna work for us and be effective to get us from where we are now as a company to this next level that we’re trying to get to as a company without getting tripped up in all the trappings that an org. chart will have around, well, now, they’re at a higher level than I am. Wait, if they have this title, then

they're entitled to this. And so, we encourage people to really, at least internally, stay away from those kinds of traps.

Jaime: Yes, because it's a never-ending game that nobody really wins at. And unfortunately, or fortunately, at a very small level, everybody's wearing different hats or different seats anyway. So, trying to understand what goes where for somebody that doesn't have an accountability chart, it's very difficult.

Mark: It is. It is.

Jaime: So, how do you start with an accountability chart?

Mark: So, let's go back to your comment because we talk about wearing different hats, and we really want people to think about – sometimes they get confused by the fact that they're wearing these multiple hats. So, you gotta stop. Now, which hat are you wearing right now? And it helps them get clear on, okay, yeah, from the perspective of this seat, this is what I want. From the perspective of that seat, maybe I want something different. And then they have a different way to kinda work through all of that. But to get started, it's really as simple as that. I mean, as laying out what – take the people off of it.

Take everything away and go, “All right, if we're trying to get from, again, whatever place we're at as a business right now and, 12 months from now, 18 months from now, we wanna be this size, doing this stuff –,” whatever it is that you're shooting for. If you had the luxury of starting over, being smarter because of what you've learned to get to this point, how would you draw it up? How would you lay this thing out in a way that you think is gonna be really effective at this next level? And then so, start there. So, it's kinda like skating to where the puck is, the old sports analogy of kinda going toward the future.

Let's lay out what that future should look like, and then we can kinda back into where we are today and where the people fit, where they fit really well. And we've got some different techniques to make sure that they actually are the right person in a right seat in that accountability chart. So, you go through that, and you'll find some of those changes, some of those shifts are super easy to make. They're really obvious. You can do them quickly. Some are much more difficult. Some, it's just gonna take you some time to transition. But when we clear all the dust away, we can go, “All right, all this stuff kinda clicked into place, but this and this,

ah, we gotta figure out how to solve those puzzles.” And you really focus your energy on the places you need to instead of everywhere all at once.

Jaime: Yeah, I’ve found that, when I go into a business, the owner’s sort of in the middle, and then everybody’s sort of pointing at them. Everybody’s just looking. But then they might not be a great manager either. So, even when you’re talking about sort of laying out the groundwork, sometimes it’s hard for owners to actually analytically put that down because they’re such global visionary thinkers, like you’re saying, sitting there with a blank piece of paper. So, is it easier? I mean, I know it’s easier with an integrator. What if they don’t have an integrator yet? What do they do for an accountability chart?

Mark: So, the accountability chart can still do it. It helps them see the problems that they’re feeling. So, the situation you described, I’ve got everybody reporting to me. And how many is that? Well, it’s 12 or 15 or 7 or whatever the number is. Whatever the number is, I’m gonna bet it’s too many because, as people, on average – we have different spans of control of stuff that we can handle.

And visionaries, typically, while they can handle a lot of stuff in their brain, when it comes to working with people in their organization and really being a good leader to them, really being a good manager to them, really holding them accountable, giving them the love and care that they deserve, they’re typically not great at doing that with very many people.

For me, I’ve managed lots of people. There was a time in my life that I thought I was a pretty good manager. But now, having seen what I’ve seen and experienced what I’ve experienced, I can look back and go, “You know what, I’m really not.” I can effectively manage about one person, and that’s not atypical for a visionary. So, it makes all the sense in the world that, if I can manage one really good integrator and then that integrator can kinda be my multiplier that can be a really good manager for all these others, that’s where we get the help. So, visionaries, in general, are not effective. They’re not as great a manager as they think they are. They’re capable of it, but it’s hard for them.

Jaime: Thank you for saying that. Yeah, usually, I have people read that book, and then the relief washes over their face once they realize they don’t have to hold it altogether all at once.

Mark: No, it's okay. It's okay.

Jaime: But the integrator's supposed to be able to hold the visionary responsible and accountable to things, too, so they don't have to be the ones doing it, right?

Mark: Yeah, and by design, we really don't want the visionary to be accountable or responsible for things that they shouldn't be. So, we take that holding everybody accountable in the organization – we take that off their plate. So, now, we don't have – we want the visionary focused on the things that they're great at, the things they do naturally – coming up with new ideas, seeing the future, seeing where things are headed, and where we need to be positioned along that path, working with folks out in the world, whether it's in your industry or in the community or wherever – strategic partnerships. They're great at these external relationships, and so let them stir all that stuff up. Let them do all that.

Hold them accountable for activities around that, and then the integrator is really focused internal, on the organizations, making all that stuff happen, helping the visionary see where it plugs in. One dynamic that's interesting there, Jaime, is, if you're gonna ask an integrator, at some level, to hold the visionary accountable, there's a matching dynamic that has to happen. So, the integrator has to be strong enough to match up and lean into that visionary and not let the visionary just plow them over, which is what they're, instinctively, gonna do. So, when you're thinking, again, about that two-piece puzzle, that's one of the factors that we wanna look at.

Jaime: A million types, yes. Thank you for saying – I'm not really high DI on the DISC, and I zoom over absolutely everyone, and I find that a lot. In a wonderful way, visionaries are very good at being driven and, potentially, drive over your integrator if your integrator isn't taught how to sort of manage up, right?

Mark: Yeah, visionaries are a force of nature. They really are by design and by necessity, and it's wonderful. And so, we just gotta – to get the effective dynamic – that's part of the structure that we try to put around the relationship is it's mutual respect. So, the visionary's not looking down on the integrator. They don't think of the integrator as less than. It's like a partnership. I have one client that calls it their business marriage. It's that kind of a deep close relationship where they really begin to understand each other.

Jaime: Do you have tips on that then too? Because it's not something that wham, bam, you just have that right away. So, what sort of tips do you have for people to sorta try and get that meeting of the middle?

Mark: Yeah, so we call it the five rules. And number one of the five rules is to stay on the same page. And so, it's a simple meeting discipline, really, that – we call it a same-page meeting where the visionary and the integrator, at least once a month, they block time to sit down and make sure that they're on the same page. And it's interesting because I will see visionaries and integrators just say, "Oh, we see each other every day. My desk is right next to theirs. We run into each other in the hall at least six times a day." Well, yeah, but what do you really talk about?

And so, they don't get into it. And so, in the same-page meeting, it begins with sort of a real open, honest, human check-in. What's going on in your world? We have this serious deep relationship, so let me know. What are you thinking about? What's fun for you? What's happening with your family? What's going on with the things that you enjoy outside of work? And so, we begin to really know each other. So, we open with that and share some information that we probably wouldn't otherwise spend a lot of time on.

And then each of us brings our list of issues. So, I'm thinking about things that are coming up that I'm concerned we may be out of alignment on or we could easily get out of alignment on. So, I wanna be proactive and kinda head that stuff off. Maybe there's some things where I've seen some evidence that we're out of alignment. So, somebody said something. I saw you say something – whatever – and so, there's something there I wanna go back and revisit and try to clean up. So, I've got my list. You've got your list, and we sit down, and we just kinda take turns chipping away at it.

And our commitment is we're gonna stay in that meeting until we get through both of our lists. And so, we gotta do whatever it takes to get 100 percent on the same page about all the stuff that's on our mind so that, when we walk outta there, back out into the world, back out into the organization, we're truly locked arm and arm, a united front, like two halves of the same brain. So, if somebody comes up and asks us each the same question in separate places, we would both give at least pretty close to the same kind of an answer.

Jaime: It's marriage advice, also, for anybody that's listening too. Stay until you resolve arm in arm. I think that's amazing. So, what advice do you have, especially, on hiring an integrator? If you're bringing somebody in and they've never been – especially if they're a smaller organization of, maybe, 20 people. There's a lot of different levels of people that can fulfill that role, especially for somebody that could be a really big corporate guy, but might not fit in the culture of a 20-person team. How do you sorta to flesh out who's a really good hire for you?

Mark: Yeah, so, again, it's – and actually, for this discussion, I'll introduce – this is something new, so I haven't actually talked about this before, but it's on my whiteboard over there. But if you think about it as a three-piece puzzle where the two pieces that we've always talked about, or the visionary and the integrator, the third piece is the company. Companies need different things, both from their visionary and from their integrator. So, some companies need lots of vision. Some companies just don't need that much because things are pretty stable and not moving that fast. Same thing from the integrator. Some need lots of strategic integration.

How is this stuff all gonna kinda work together on some grand scale? Others, they really need something closer to project management where it's just kinda making sure that things are happening. So, you've gotta understand your company. So, we're trying to fill this missing integrator piece. We've got a visionary that's plugged into the right company trying to solve for the integrator piece. So, what is the business need on that spectrum, if you will? And what does the visionary need? Back to that two-piece puzzle. So, you gotta do the assessments.

So, the visionary has to do them, and then any integrator candidate would do them, and then there's a process to basically lay, for a candidate – lay those out side by side and see how they match up. And what we're looking for is we want one of the pair to be high and the other pair to not necessarily be high. But on every question on the assessments, at least one of the pair needs to be high. That makes sure that we have all the capabilities that we really need in the combination.

And then we look, on a given combination, for areas where both of them might be high or both of them might be low. So, you can think of it as gaps if they're both low or overlap if they're both high. And we just wanna identify what those are and how many of them there are. So, if I put a pair together and, outta 40 questions,

they have 20 things they're both low on, that's probably not a very strong combination. But if I've got a couple things that are low, that's okay. We can probably figure out a way to address that. We just need to talk it through. Likewise, if I had one where we were both super high on everything, what's gonna happen there is we're gonna fight for the wheel. We're both gonna try to drive on that thing. It's gonna be instinctive for both of us.

And so, we can have a little bit of that because we can say, "You know what, Jaime, we're both high on this. You seem to enjoy that more than I do. You handle that. I'll stay out of it. I'll let you take the lead there. You let me take the lead here," and we kinda work that out. But if we're both fighting for the wheel on everything, that wouldn't be a combination. So, we gotta understand this, and it's really all about the visionary looking at themselves. How ready are they? What do they want? What do they need? What's their shape? And then baking that into that job description and then going out there and trying to find it, trying people to see if they fit the puzzle, see if the glass slipper fits.

Jaime: Exactly. It's such an art. I wanna ask you about training and all that stuff. I know you guys have an academy. But how the heck did you create that assessment? Because I've taken that – it's really interesting, and there's a lot of gaps. So, how did you actually create that?

Mark: So, collaboration with Gino and I back when we were going through and writing the book, and we just really tried to understand what the characteristics are of a really great visionary and a really great integrator, both from what they need to be and what they need to be wired to be. So, there's some things that we just are intrinsically, some things that are just our gift, the way that we were made. Nobody had to teach us. We just knew how to do that.

And there's other things that we have learned along the way. And then we have a different affinity for those things and just what we love and what comes easy for us between them. And so, that's what we were looking for is, what's that set look for the visionary, and what's that look like for the integrator? We've changed the assessment. I don't know if it's –

Jaime: I was gonna ask you that. Okay.

Mark: If you've seen it in the last few months, but, yeah, we actually integrated it. So, we used to have each of the assessments sorta

standalone. And so, now, we've integrated it, and there's a couple thoughts behind that. One is we just found it was super important for everybody to take both. So, it's just an easier way. I'm in here. Let me take both. The other thing was it makes it more difficult – not that anyone would try to game a test, but it makes it more difficult to do that. So, the things are kinda mixed up. It's not as obvious which question is related to which role. And so, I think that gives us, probably, a little bit truer response.

But the message I would want anybody listening to this that goes and takes that assessment is, please be honest. Don't do that. You're just gonna hurt yourself if you try to go, "Well, here's what they're looking for," and put that answer in. It's not gonna help you in the end. It's gonna come back and not be good for anybody. So, just be totally honest with yourself, which, sometimes, is hard. It's hard to be honest with our self. And don't put what we should put, but put what we really feel when we think about the context of the question.

Jaime: I really appreciate that. Yeah, I noticed it changed, but I also was like, "Huh." Yeah, beforehand, I was doing the visionary going like, "I'm definitely that." And the integrator, I was super, super low, but you could just tell which was – I'm like, "I know I'm a low integrator," even though I used to do project management back in the day. It was like pulling teeth. It's like, what is natural versus what is holding everything together? Very, very stressful, which makes a huge difference.

Mark: Yeah, and think about that for a second, Jaime, because visionaries, that's one of their struggles when they go through this is they're capable of so many things because they've had to be. They had to do it. At some point in their career, they've had to do a lot of this stuff. So, yeah, I can do that. And so, the mindset that we want them in is, yeah, but what do you really love? What do you really enjoy? What energizes you versus what beats you down and drains you?

Jaime: Yeah, definitely, especially once they've had a taste of what it's like not having to do that stuff. I can't make myself do it now. I just literally cannot make myself do it. So, talking about the training, especially because you said it's sort of an art, depending on who we have and what their skill sets are. But I know you have an academy. So, tell me how you would actually train and level up an integrator.

Mark: So, let's kinda start at the beginning. So, the beginning is a new course that'll launch later this month, or at least when we're recording this. We're calling it Rocket Fuel 101. And so, that's the course that's for visionaries and integrators and, really, anybody that cares about the success of both roles to kinda lay out this concept in a way that somebody can understand what the structure is. They can kinda see how it works enough to make a decision. You know what, this is something that could help me, as a visionary, to kinda get to that ah-ha point you mentioned before that says, "You know what, yeah, I need one. I want one."

So, we wanna get them to that point or not. They may go, "Yeah, that won't help me," and that's fine too. And then for the integrator to understand, "You know what, I can do that. That is what I do. Now, there's a name to call the job I've had all these years." So, that's sorta the epiphany that the integrators have. So, they go through that first, and then we bring them in. And then, for the integrators, which is what you asked about, they go on to their path, which is called the integrator academy. And the first class along that path is a master class that really is designed to help them become truly great as an integrator.

And the way we do that is we show them what great looks like. So, we walk through the whole thing. Here's what it looks like to be truly great as an integrator. So, then they can kinda see how they match up to that ideal and get focused in on the things that they need to fill in along their path, along their journey. And then it's a never-ending journey. It's just like being a great sales person or great with numbers or an operations specialist. It's a craft, and it's something that they're gonna be investing in and working on and trying to get better at for the rest of their professional career.

Jaime: What about firing them? When do you know when they're doing a good job, when they're not? I know we get very judgey. I know you have a lot of analytics, which is amazing. But how do you know?

Mark: Yeah, great question. So, uh, first, it's really difficult, and that's one of the risks is you get into this. It's hard. It's an important decision. And so, you really wrestle, and you try to do your best job on the frontend of that. But now, we're into it. And so, one principle here is we want visionaries to do their best to be patient, which is really hard for most visionaries. But do your best to be patient so that you don't just jump in and think that this is all gonna be magically, from day one, the way that it's ultimately

gonna be. It's not, and that's okay. It's gonna take a little bit of time because you're gonna have to get on the same page. You're gonna have to get synched up with them. They're gonna have to understand your business and the people and all that kinda stuff. It just takes a little bit of time. So, we wanna have a plan for that going in. So, you wanna work with your new integrator to lay out, you know what, here's what it feels like it should look like, and they'll push back on that. So, they know you want, probably, more than what's realistic. And so, hopefully, they'll help you come up with a fairly reasonable plan.

And then, through those same-page meetings and just regular checkpoints along the way, we try to manage that along the way. So, we don't let it get too far out of hand. If it feels like it's falling behind, then we get on the same page about that. Maybe the plan was too aggressive. Maybe something's not happening. Maybe the visionary's not letting go. There's all kinds of different dynamics that it could be, so you wanna really manage it. Here's what happens: at some point, if the integrator gets way off path – so, they're way behind whatever that plan was. They're doing bad things. They're making bad decisions. It's just not working.

Then, it's a simple accountability discussion like we would have with any other employee where, crystal clear, here's the expectations. It should be something that's a surprise. So, it's not something that just comes outta nowhere. There should be echoes of this in many, many, many meetings that lead up to that point. But there's a process to kinda move them and ultimately hold them accountable for doing the seat in the accountability chart. And if they don't, we fire them. And we have to get a new one, and there's pain and all kinds of things that go with that, and it feels like wasted effort.

And sometimes, it takes more than one try to get it right. And typically, the reason for that is because the visionary hadn't learned something about themselves yet that was really important. And so, in the process of working with the wrong integrator, a lot of times, that becomes clear to them. They're like, "Okay, it is gonna be important for the integrator that works with me to be able to fit this unique thing that I hadn't understood before." That's not always true. But a lot of times, that's the case.

Jaime:

It's such a knowing yourself thing that, in business, in general, I was like, "Oh, the whole thing is about learning what you're good at, what you're not good at, your strengths, what you –," and, at the

beginning, like you said, you have to wear a million hats. So, it's kinda hard to know what your strengths are when you're coming up in business when you can do everything. How do you suggest people figure out what's actually good?

Mark: Yeah, so that's really one of the most difficult challenges and back to how you take those assessments. It's just being super honest with yourself. We'll get asked, "Well, can someone be both? Can someone be both a visionary and integrator?" And the answer is, yes? There are a very small percentage of folks out there in the world that can really be great at being both a visionary and integrator in a single organization, in the same organization. And I've met, maybe, one of them. Gino's met a few more than I have. Just his client base, for whatever reason, there's a couple more examples there, but it's just a very small percentage. It's definitely less than five percent.

And coming into that, though, most visionaries – not most, but many, many, many more than that visionaries think that they can do both. And so, the question I'll put to them is: look, if you were – whatever your beverage of choice is that really gets you to be uninhibited and be able to speak truth, and if I've got a gun to your head, and I have to make you pick, which one would you pick? Which one would you pick that you were gonna spend all your time and energy on? And typically, it's not that hard. It's not that hard for them to pick one. It's more hard for them to let go of the image, the feeling that I'm great at this other thing too. That make sense?

Jaime: It does. The hard thing, too, with that, though, is, a lot of times, when you're 10 or 20 or 30 or even 50, the owner still has to do a lot of other roles are potentially underneath, like the creative side or the this, and that makes it hard also.

Mark: Yeah, so let's talk about that. So, it's back to the hat's thing. If you're the visionary and I'm the integrator, but you also report to me as one of these other leaders or on one of these other teams, you, as the visionary, maybe the owner as well, you've gotta be able to take that hat off and sit in that other seat and do a stellar job that's basically the shining example of what we would want any employee in the organization to do. You can't pull the owner card outta your pocket and go, "Yeah, but." You can't switch hats in that meeting, which is super hard, but it's absolutely the right thing. And so, that happens. I see people do that effectively all the time. The other effect that it has, though, is, again, it makes it

visible of what's actually happening. And they realize, you know what, I'm doing this because I have to. I don't really want to do that role. It's necessary for now, and I'm willing to do it for a little while. But as we think about the different priorities of the next people moves we're gonna make, I kinda want that one to be pretty high because I wanna get outta this, and let's get somebody else in there so I can really focus on this other seat that I really love doing.

Jaime: I love that you say that too because I've had clients where they're in that and then realize – they're like, “Oh, I have a job.” So, as creative as it is, then it feels like I have a job, and then that part of my life then sucks, and they start to understand where they wanna go and, like you said, who they need to hire next, which I think is awesome. So, question about the integrator role, especially when it comes to EQ, IQ, and being analytical, and what's that level that we need, though, especially if you've got really high EQ sort of management team? I've just seen people come in and be very, very hardcore with lower EQ than – I don't know – is good. I don't know if that's a good way to put it.

Mark: Yeah, so I wouldn't say lower EQ is good. In fact, I've seen it – and I can't give you a source on this, but that there's a higher correlation between high EQ and business success than there is between high IQ and business success. And I absolutely believe that applies to the integrator role. And so, they've gotta be plugged in. They've gotta be understanding the people dynamics that are going on there. They can't come in and bulldoze everything, but they can be direct. They can be very clear on what the expectations are and then how behaviors are matching up to those expectations and very straightforward in the communication around that.

And then it's all sorta bundles in with whatever the core values are of the organization. So, you've got some organization whose core values are much more hardcore and some whose core values are much more touchy feely – whatever terminology you wanna put on that – human. And so, that's all part of that three-piece puzzle. So, the integrator's ultimately gotta fit in with the culture of the company, but the equation of what's happening there is they're making sure that expectations are so crystal clear around what needs to be happening here in your role, in our culture, and align with our core values, and here's how reality is matching with that.

Here's how your behavior – here's how you're showing up relative to that so that nobody can be surprised. It's just clear. And then, when that's in alignment, it's awesome. It's a beautiful thing.

When that's out of alignment, great. Then, we know we need to jump in and fix that. And if we can't fix that despite best efforts, then we gotta change that.

Jaime: Well, when it comes to EQ, do you know of any tests or books or anything? Because I think that's what's tough too. The owners are like, "They seemed great on the interviews," and maybe they have a rigorous interview process. But then, when they get in there, they're like, "Oh, the communication is lacking," or, "The EQ is lacking," or there might be pieces that they didn't realize in the hiring process. And now, they're sort of into it. How do you train for that? Or do you know any tests that sort of check on that?

Mark: Yeah, so, I mean, there's lots of great books on EQ. I don't have a particular assessment that I could point you to. That's an interesting question.

Jaime: I want one. There's IQ tests everywhere. I've not found a good EQ, so I was hoping you –

Mark: Yeah, so something's telling me that I've seen something or heard something, but I don't have it at the ready to give you.

Jaime: No problem.

Mark: If I come up with one, though, I'll shoot that back to you, and you can add it.

Jaime: Definitely.

Mark: But, yeah, that would be a great assessment. Assessments are a big part of the process, though, whether it's an IQ assessment, whether it's something like Kolbe or Culture Index that looks at their cognitive wiring, strength finders, this – these are all good. And so, stack them up. So, as the visionary, you gotta take all of them and really understand yourself in all these different ways and figure out which ones really resonate with you and whatever you're using in your organization and be sure you use those with the integrator as well. And again, it's all about finding that great fit.

Jaime: Yeah, I think it's funny we're a little obsessed with assessments, in general, though. So, when they're on the hiring process, it's like, "Take the DISC. Then, take the Kolbe. Then, take the People's Values. Then, take the Culture –," that we can't do all of them. But which ones are your sort of go-to favorites?

Mark: Yeah, so I have tons of clients that use Culture Index, and so see a lot of success with that. Kolbe is another great one. And again, those folks that are experts in those tools, they're also really great resources to help the visionary understand, what profile are they looking for? If you look like this, here's a that that's gonna fit really well with you to achieve this visionary/integrator combination that we're looking for.

Jaime: When it comes to the visionary and trying to be creative – because that's sort of the elusive artform. I know you don't give them big rocks or anything like that to try and sort of hold them in. You kinda wanna keep it loose and not so structured so their creativity can go. Do you have any tips for visionaries to really get the most outta their own creativity?

Mark: So, first, I don't give them any rocks because they're just gonna frustrate the team, typically, although some of them, boy, they really wanna hang on to them for a while. But, yeah, so try to get them outta that. So, then one of the things that will happen, Jaime, is some visionaries will have this phase they'll go through that we call being put out to pasture where, all of a sudden, they're not doing all this other stuff that they used to do. I don't have rocks. So, what am I supposed to do? And they have this really weird transitional feeling that they go through. And the reality is it's sorta like learning a new habit.

And what they need to understand is spending time in their unique ability, as Dan Sullivan calls it, in their space that is easy for them – just because it's easy for them doesn't mean that it's not what they should be doing. That's great that they can spend time in something that comes much more easy. So, it's a process, though, for them to get accustomed to spending time in that creative space, doing the things that are more consistent with the visionary role. They're still plugged in with the rest of the team through the meeting rhythms. They're in the weekly leadership team meeting.

They're in the quarterly planning meeting. So, they're engaging and interacting like that. They're doing the same-page meeting with their integrator. So, they're staying plugged in. But then, for them to be able to, in alignment with that, go away and think, go meet people, go to this event where the inspiration will just hit them when they happen to be sitting there not even looking for it, that's what we need the visionary doing so they can bring all that stuff back into the mix, and we can stir it up and turn it into something really helpful.

Jaime: How do we make them not go after new business idea – I mean, they can. Don't get me wrong. But I feel like, when they're like this, they see things all over the place, and it's not refined for one business.

Mark: Yeah, so that's okay as long as you got a strong enough integrator. So, again, they go out, and they play. Send them out. Let them go out. It's recess all the time. They get to go out and meet people and think about things and look at stuff, and then they come back, though, into that structure. They come back to those same-page meetings, and they go, "Hey, integrator, what about this?" And the integrator, being in-tune enough to understand their visionary and how to handle it, doesn't go, "No, that's stupid."

But they go, "Okay, interesting," and they kinda get a little bit of information, and then they, very effectively, lay that into your strategy that you've agreed to and you're on the same page on and go, "Let's think about how this fits here." And they make it visible for the visionary that, you know what, that actually is something that takes us a totally different direction. It doesn't fit in alignment with what we're focused on. And so, they use the tools to bring that back into alignment. So, they become a filter. So, the visionary can have 20 great ideas – or, I should say, 20 ideas. Maybe a couple of them are great. And the integrator can help us get really focused on which ones are great that we can actually put into practice.

Jaime: I know the integrators are coveted if they can actually work with us and help us filter. So, do we partner with – I know pay is a really big thing. Number one, even if we have the cash to be able to pay them, sometimes they want partnership or some sort of stake in the game. So, what do you suggest for that?

Mark: So, get this question a lot, and there's no single model. So, I see everything from something that is an ownership stake to something that has no ownership, things that are high fixed with no variable to high variable with no fixed and anything and everything in between and all different levels. So, there's no one answer there. You have permission to solve that any way you would like, and it really is just a function of what works for the business and what's gonna be attractive and engaging for the particular integrator that you're working with.

Jaime: Yeah, it's always tough to, A). Answer that question as you, but also, B). Test things out. So, you'll see owners test things out and

go, “Oh, that was not a good idea.” So, how do we keep the risk mitigated when we’re trying to pick which one might be good?

Mark: Well, so, there, a lot of times, you can start with some kind of a trial engagement. So, you bring them in on a project basis, maybe, at first so you can mitigate some of the fit risk around that. Or the fractional model that we talked about, that’s another possibility. Uh, you can tie it to things to where, whatever the comp. is, is essentially self-funded. So, if we achieve X, Y, and Z, we know that’s gonna have this economic impact. So, I’m okay to pay that in comp. And those are the techniques that I would suggest, first, to try to mitigate risk. You’re never gonna get rid of all of it. So, you just gotta find the place you’re comfortable.

Jaime: And then go for it. Time flies when we’re talking about Rocket Fuel. Okay, so I have to ask the last question. What is one action listeners can take this week to help move them forward towards their goal of a million?

Mark: So, in the context of our conversation, I think I would put them back to that Rocket Fuel 101 that I talked about. So, it’s really, understand the structure well enough that you can make your decision of whether, if you’re a visionary, an integrator has that role that can help you. And if it does, then that’ll lead you to take your next step to go out and find one to fill that gap and take your business to the next level.

Jaime: Yes. Just imagine the relief that you’ll have if you have an integrator that is really amazing. Thank you so much, Mark, for coming on the show today. Everyone, go grab the book, of course. But where can we find more about you online, Mark?

Mark: Yeah, markwinters.com, Mark C. Winters on pretty much any of the social. So, that’s the first place to look. And particularly, from the website, it’ll take you to all the Rocket Fuel stuff, and you can keep tabs on everything we got going on.

Jaime: Yeah, and go take the quiz. Thanks so much for coming on the show today.

Mark: Take the quiz.

Jaime: I really appreciate it.

Mark: Thank you, Jaime. I had a blast.

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Duration: 43 minutes