

Great  
Talent  
Great  
Business

**EP4**

*Season 2*

# **Cheat Sheet**

## **You're a CEO – Not a Hero: How to Maximize Your Team's Effectiveness**

Featuring Jennifer Berkowitz

By Rob Levin, Creator of [Greattalentpodcast.com](https://greattalentpodcast.com)  
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## Section 1: Paint the Picture (3-Year Vision)

**Goal:** Clarify where you're going so your team can follow.

**Quick Prompt:**

Spend 10 minutes visualizing your biz 3 years from now. Be vivid. Be bold.

**List 5–7 vivid future snapshots:**

- What does your office (virtual or physical) look like?
- How big is your team?
- What's your top revenue stream?
- What do your clients say about you?
- What are you most proud of?

→ Example: "We've expanded to LATAM, serve 100+ clients, and celebrate wins every Friday on Zoom."

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## Section 2: Mini Accountability Chart

**Goal:** Ensure clarity on who owns what.

**Pick 1–2 key roles**, then fill in the blanks:

Role	Accountable Person	Top 1–3 Outcomes / Metrics

→ Use this mini-chart to simplify roles + define success for the next quarter.

## Section 3: Ditch the Hero Hat

**Goal:** Empower your team instead of fixing everything yourself.

**Reflect:**

Where do you step in too much?

**List 2** hero moments to delegate:

1. I always \_\_\_\_\_ instead of letting my team handle it.
2. I could step back on \_\_\_\_\_ by coaching instead of doing.

→ Choose one to delegate this week with clarity and trust.

## Section 4: Dashboard Check: Leading vs. Lagging

**Goal:** Track what's coming, not just what happened.

**Step 1:** Audit Your Metrics

List 3 you already track:

1. \_\_\_\_\_ → Leading? Lagging?
2. \_\_\_\_\_ → Leading? Lagging?
3. \_\_\_\_\_ → Leading? Lagging?

**Step 2:** Add 1 Predictive Metric

- New example: # of sales calls booked, proposals sent, or new leads per week.

→ Ask: Does this metric help me forecast better?

- 1.
- 2.
- 3.

## Section 5: Right Person, Wrong Seat?

**Goal:** Spot misfits and make smart moves.

Review your talent chart. Ask:

- Anyone scoring **high on values but low on output**? → Wrong seat? Training needed?
- Anyone **low on values**? → Culture risk? Tough convo ahead?

Note down 1–2 moves you might need to make:

“\_\_\_\_\_ may be better suited in \_\_\_\_\_.”

“Time to revisit expectations with \_\_\_\_\_.”

→ *Make people decisions with clarity, not emotion.*

***“Get the right people in the right seats, doing the right things. Then get your seatbelt on.”***

**For more information and resources, scan the following QR codes:**

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