

## **Scaling Up Services**

Episode 202 - Daniel Marcos

<https://www.scalingupservices.com/podcast/202-daniel-marcos>

Daniel Marcos, CEO, Growth Institute

Daniel Marcos is a serial entrepreneur, business coach, and a passionate learner. He is the co-founder and CEO of Growth Institute, the leading online executive education company for C-level executives at fast-growing firms. He is a keynote speaker and a CEO Coach with a mission to help 1 million entrepreneurs.

Daniel is a member of YPO and EO and is a certified coach in the Scaling Up methodology. He is a graduate of EO's premiere CEO program, the "Birthing of Giants", and he holds a BS in Industrial and Systems Engineering from Monterrey Tech and an MBA from Babson College.

In less than a decade, Growth Institute has been recognized three times among the top 5,000 fastest-growing companies in the USA, with over 40,000 members across 64 countries.

<https://www.danielmarcos.co/impact-x-workbook>

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## EPISODE TRANSCRIPT

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### 0:02

You're listening to Scaling Up Services where we speak with entrepreneurs, authors, business experts and thought leaders to give you the knowledge and insights you need to scale your service based business faster and easier. And now here is your host business coach Bruce Eckfeldt.

### 0:22

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### 0:58

Welcome, everyone. This is Scaling Up Services, I'm Bruce Eckfeldt. I'm your host, and our guest today is Daniel Marcos. He is a scaling up coach. He is a long standing member of the scaling up community. I think those of you that have been following me and following the podcast, we talk a lot about the scaling up folks. And one of the things I love about scaling up is the community of coaches. And Daniel is another scaling up coach, and he has a book coming out we're going to talk a little bit about the work that he does and how he's come across some of the insights that he's had working with lots of different CEOs and founders, and why write the book and what he's hoping to achieve with that. And we're gonna dig into the topic. It's an interesting one, I think it's one that's often neglected by a lot of companies, a lot of founders, a lot of CEOs. I'm excited to have this chat with that. Daniel, welcome to the program.

### 1:39

Thank you very much. Super excited to be here. Thank you Bruce.

### 1:42

Yeah, well, it's a pleasure to have you. So why don't we do a little bit of just kind of background for those people that don't know you, and kind of how you got into coaching what your story was a scaling up community. And then we can dig into the book and though and the work that you're doing with the founders and CEOs at this point, perfect.

### 1:56

I am an entrepreneur for 23 years, originally from Mexico. I was born in Monterrey, Mexico racing Mexico City. And my first job out of college was working for the Mexican consulate in Hong Kong. When, when England gave Hong Kong back to China, there was a lot of events and stuff. So I was hired for those three years, the year after and the year before, and he was amazing. But interestingly, while I was there, I was reading all these magazines of all these young internet millionaires in Silicon Valley. That was 1998. I was there in 1997 1998. And I said need to be an entrepreneur and I need to go back to my country to be entrepreneur. So I went back to Mexico, I knew a little bit about finance. Because during college, I worked for a brokerage house, I was a

trader on the floor, got it trade, the traders desk, so I knew something about finance. And I went and built the first FinTech company in Mexico. Indeed, interestingly, I was the first person to put stock quotes of the Mexican market online. I mean, yeah, that was 22 years ago. And by the way, interestingly, I have a, I have a niche company today that we're growing really fast. But one of my employees is one. It's a millennial, she's been 27 or 28. And recently, she asked, Hey, why are you so famous? Why this older we started? And I was like, Yeah, because we put the first news, some quotes online. And she looked at me and said, like, why is that important? And I was like, because before you watch your news, in the 7am, news, radio or show, and then at 7pm, right, if something happened at 2pm, in their part of world, you will never hear it until the night. Yeah. And she looked at me like weirdness. Like, what do you mean? She didn't get it. Today, we get news, like, like 24 hours every minute.

**3:46**

It's so true.

**3:48**

And she looked at me like I was crazy. And I was like, rate, we raised millions of dollars. And we make this really big company, just by putting stock quotes online. Yeah. So that's how we all started. We got very lucky we merged with Argentina and company and a Brazilian company. And we raised like \$70 million from Goldman JP and all the big boys in New York, and build the second biggest internet company in Latin America, back in the internet time in the 2000s. And we ended up selling it to Banco Santander, the biggest Spanish bank, I think is the 30th back in the world, and we solid with 1200 employees, three banks, five brokerage houses, and a really, really big operation. Yeah, so it was a lot of fun. Yeah, I can I can imagine after that. Then I did a mortgage bank in Austin, I moved to the US. I did a mortgage bank and I got destroyed 2007 with with all the subprime, and they said 2007 because really, people don't realize that the subprime went under 2007, a year before the prime market went under. And I really believe by the way we're in the similar situation today, between COVID and the next. So I got completely killed and destroyed in 2007. I ended up closing 2007 before all the big crash, but we knew it was gonna happen. It was it was impossible not happening. Yeah. And then after that, Vern called me. Vern was my coach, with my first company, I went through his program of breathing of giants and the rest. And he called me so they use what are you doing now you should coach. And I was like, no way. I don't trust myself to be entrepreneur again. And you want me to coach someone else. And he said, That's precisely why you went through such a hard process, they have to make sure it does happen again. And and let me just give a little bit of a pause. But I, I had probably six months of my life, I was depressed, waking up, crying at the middle of a night and sweating cold, you also really rough patch in my life. And Varun helped me go through it. And then I start coaching and figure out that I could really help companies doing that. I use caligo methodology, and then starting doing all the things. And I've been a coach for last 13 years now. And then the last thing of a story. Eight years ago, I went to burn after going through Singularity University. And I said, Vern, we need to bring all coaching online. And I begin, like pushing him to go online with scaling up. And he said, Yeah, yeah, we're gonna do it. We're gonna do it. And then after a year after, he called me said, I'm never gonna do it. You want to do it? And I'm like, Fine, let's do it. So I, I partnered with Vern to start growth Institute eight years ago. And today, we've served over 50,000 executives, from 10,000 different companies in 68 countries around the world.

**6:29**

Yeah, yeah, that's a great number. So

**6:30**

it's been it's been a good growth.

**6:32**

I always find, you know, every every entrepreneur I've talked to has their horror story. And invariably, it ends up at some point, they end up on an air mattress in their office. For some reason, for some period of time, it just didn't seem like everyone's got their air mattress story.

**6:48**

I was already married. But I lost all my assets had a million dollars. Almost a divorce. He was he was rough. It was very,

**6:56**

yeah, yeah. No like that. It's it's part of the process. It's part of the journey. Yeah.

**7:00**

And by the way, if you ask me, What happened after I become a way more disciplined intrapreneur? It's like, you can't imagine how disciplined I am today compared to before?

**7:10**

Oh, yeah, no, I think, kind of going through business cycles, you know, you know, business business challenges, and having children. teach you exactly how much free time you had in your life before. And all the things you can do better to manage your time and energy and focus.

**7:26**

Yes, I feel so so I've learned the most. And I've gone through the biggest transformation in my life. After going on there with my company.

**7:34**

Yeah, yeah. Now it is. It's all learning. It's all learning. And I think if you can, if you can take that and figure out what the learning is, and what the new ways of doing things are, and what the new questions are, and stuff, it actually it makes you an amazing coach. I think that's one of the things certainly, I think the most insightful conversations I've had with leaders that I coach certainly come from talking about dark hours and challenges. And, you know, the things that didn't go so well, and what we learned from it, and how to transfer some of that knowledge. Yeah, I honor that. Good. So tell us about the book. How did you? How did you come across the kind of the idea behind the book, tell us the story, I always find that there's a there's always a backstory to people, you know, writing books, so

**8:10**

what's yours? So for me, it's like you, I've been coaching CEOs for many years using the scaling of methodology. And, and I, I work with them a lot building systems and procedures, so they could really take the company to the next level, and capture all the knowledge and everything and just make it to work in a more efficient way. And I begin helping them with all their systems with their accounting system and production system and everything. And then they begin asking key, and now show me your CEO system. How do you leave the company? How do you take decisions? How do you communicate the decisions? How do you track all of that, and they look at me like I was out of space, like, they have no idea what it's asking. And I begin

realizing all the habits and systems, the best CEOs that I've coached do regularly, and they all start having a pattern, certain flow, and they figure out that there are certain things that the best CEOs do. So I've been learning from a lot of the clients that I work with, and now through the growth EC to a lot of the people that have gone through our programs. And I really believe there's a system to help you be a better leader, but be a better seal. So I'm putting all of that together into a model that I call impact x. And that's how the best CEOs give 10 times the impact will have the drama.

**9:24**

Yeah. And when we talk about CEOs, who are we talking about everyday, or these, you know, early stage companies, later stage mid market companies, I mean, what's when you talk about a CEO and a system that a CEO needs? When does this apply?

**9:37**

And I focus more in what I call stage two and stage three. And by the way, in the I will ask if you could put on the description or the podcast, there's gonna be a link that people could download some slides

**9:49**

saying, Yeah, no, we'll make sure that link gets in the show notes so people can click on them.

**9:52**

I believe companies scale ups go through four stages. stage number one is kind of a startup phase one to five employees stage number two it's the six to 15. And then stage number three is around 15 to 70, to 100 employees. And then after that stage four, and they're really focused on stage two and three, and let me let me give a couple of important things on stage two and three. So I believe the best balance for revenue and lifestyle for the intrapreneur is stage two, you stay with a team 10 to 12 people that is very easy to manage, and why that's a maximum number, that's a maximum number of people that they could kind of report to you directly, you probably have a manager that two or three reports to them. But you have a personal relationship with everyone up to 2015. After that, you cannot have a personal relationship with everyone. And they have to build very different systems and procedures to run your company. So I work a lot with entrepreneurs to stay on stage two to but be way more profitable than the average and be able to have a better quality of life. And then stage three on how to really go through stage three correctly. So you could go to stage four. So when you get to stage two, I help you decide if you want and it's worth it for you to go to stage three. And I advise most of entrepreneurs do not go to stage three, because stage three, all your margins, or your quality of life and everything goes through the wayside until you get stage four. Yeah. But the problem is that people jump to stage three, believing that every dollar revenue is going to be easier. And it's not remember, Vern always teaches these valleys of death slide, you go through a valley of death, that you hate it, you start losing money or not making enough money or money as you were making before you have to invest heavily in certain infrastructure and stuff. And if you don't know you're going through there, it's really, really painful and very uncomfortable. Imagine you're a human being, and you're going through puberty whenever you're a teenager, right? If you know that that's just a stage and then you're going to be a grown man or a grown woman. You understand that you see it psychological or philosophical? And then you go through it, right? Yeah, well, whenever you're there, if you believe that's a your new reality, you hate it. And a lot of the troubadours want to come back. Indeed, I gave this presentation over a month ago with a group of intrapreneurs. And like half hour later, I got this text by a very, very big entrepreneur in England. And the guy said, Daniel Hughes explained what happened to the last five years of my life. He said, five years ago, I had 225 employees, I was miserable. I was losing a lot of money. And I really hated my life. So I imploded my business. And I just made it much,

much smaller. Today, I have 16 employees, I do 7 million in revenue, but I net three and a half million every year. And I'm as happy as hell. But yeah, but he did not realize and did not need the steps he needed to do to really become a stage four, he had the size of a stage four, but without the systems and procedures. And he was miserable. So I'm trying to give intrapreneurs and CEOs kind of a black and white process of what happens in all the stages. So they could take decisions correctly. And they know why.

**13:08**

Yeah, I refer to it as swimming the underwater cavern. If you're not, if you're not prepared, if you haven't taken enough oxygen, you know, not prepared to kind of get to the other side. You don't want to get stuck halfway getting stuck halfway as painful and miserable. And you got to know how long it is right? Like if it's a 30 foot cavern, like you got to be prepared to spend 30 feet underwater, right? If you're not prepared to do that yet, then you shouldn't,

**13:28**

because they don't know. They just gone 10 minutes, and they say I'm gonna die and they come back.

**13:32**

Yeah, right. And that's the worst of both worlds. Because now you've spent the money you've you've tried to invest on the scaling, you've suffered the cost, but you haven't gotten any of the benefits, because you've now pulled back to your previous position. So that's exactly

**13:43**

correct. Yeah.

**13:44**

So what are some of the systems like when we talk about sort of the system for CEO? I mean, you mentioned decision making, you mentioned direct reports mean, what goes into, or what is the system process wasn't system take care of. So first,

**13:57**

you have to divide the process in three. And I believe there's, there's certain steps. Step number one is working on yourself. And I always said, scaling a company, it's like being on a plane, you have to put the oxygen mask first. And I've seen a lot of CEOs that God stage two or three, and they're giving and giving a giving and their life, it's a disaster. And if your lifestyle disaster, you will not be able to leave that company. So really start protecting your systems, your your space, and your personal life. If your personal life if you're having problems your spouse, your kids, you don't have enough money to for you to live your life, then you're going to sabotage the growth of your company. So I really believe you have to work on your first then you have to build a strong team. People said no, I want to build a great company. I believe for you to build a great company, you first have to build a great team and the team is going to build a great company are the growth issues. Well we said if you want to grow your company 10x you first have to grow your team 10x and not incise it's in in quality mentality mindset and the rest So we give you a lot of tools for you to grow a great team. And I interview a lot of the client, a lot of employees of my clients, and they always tell me, I need to admire my boss, I need to admire my leader, for me to want to be led by them. So we really believe you have to work a lot on building a great team attracting the right talent, building a culture, that they work well with each other, and they enjoy working there, aligning them on the rest. And then the stage or the step number three, is really building a big company or a great company. And that's all about everything you teach Bruce, to your clients, systems,

procedures, data dashboards on the rest. Yeah, so I really believe has to be three things that you have to do in each stage. So at the end of the book, we're giving this chart, let's say a 48 things, because there's there's 12 things per stage. And then there's four stages. And what we have found with the clients that we've worked implementing this, even though there is stage three, or four, they missed, and they skipped certain things from stage one and stage two. And that brings all the drama. So we helped them to go back and fix things from stage one or two, to be able to have less drama on stage three and four,

#### **16:09**

do these always build? Or are there things that when you're on one stage, you need to do it this way. But when you're in the next stage, you need to do it really different. And you need to kind of give up that or you need to change the way you do something? Or is this do they stack this as you build on each stage.

#### **16:22**

So they stack. And we usually find that because they skip something, what they have today is not complete. So we usually say hey, if you go back and you fix it, then usually that's going to give you the clarity to be able to fix this. And it's very interesting. Whenever I get hired as a coach, they tell me Hey, I hire you, for you to go and fix the guys below. And I would like you don't get it. All the drama below? Are it's a reflection of what's happening on the top. Exactly. So the same happens on the stages. When you're on stage three, and you're trying to fix something on stage three, you're most likely going to have to come and clean stage two, before you build stage three correctly.

#### **17:02**

Yeah. And what are what are some of the things that give us some examples of some of the things that are in these stages are ones that typically are problematic, or people typically typically get wrong.

#### **17:10**

So as I said, there's, there's 12 things, let me walk you on focus on you, there's four things you have to work on, you first, operate at higher mindset, we believe, and this is something we learned from ancient atheists who say, if you create a problem at the same level of mindset that you are today, you won't be able to fix it, because that's why you create it, you have to elevate your mindset, your knowledge, so you're able to fix it, to really working on the leader, for them to elevate their mindset consistently, then find that scale your tribe, and we believe the CEO needs to have their own tribe, and it's not their employees, its mentors are other iass, or CEOs around you, eo wipey all these CEO, groups, mentors, investors, these try that is not just your team, and you need to have a balance between your team and this external network. And you know, being your member like me, for many years, the forum just it's hugely valuable to an intrapreneur, when we feel very lonely at the top, and we're having all these personal issues. So we believe the tribe is important. Number three, it's your freedom. And we've worked with a lot of intrapreneurs that we become slaves of our company. So we help the intrapreneur protects their freedom, and have their own habits and structuring their or rhythms in their life. So they could protect their freedom and don't become a slave of their own company. Yeah, exactly. And then the fourth one is legacy. We believe that the best entrepreneurs in stage number one, they're just talking about survival, right? How can I survive? And as they're going up in the company, they start thinking about how can I use my power to help someone else and really start helping them define their legacy, how they have they want to their legacy, and how they want that legacy to impact the world. So we help them with that those four things? Yes. Well, what

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is the challenging one? Do you find I mean, if you if you look at an entrepreneur as a CEOs ability to execute on those, where does he or she typically get caught up? Or where are the challenges and being able to do that? Well,

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so we believe if you do the four things, right, you start getting like like a virtual circle, or cycle and going up, but where we see most of the mistakes, it's on the tribe, you believe you're the only one going through the problems that you're having. And you isolate yourself instead of looking for help, right? Because you're ashamed of the problems that you're having. You try to stay on your own corner, and he becomes really, really lonely. And then the freedom you believe that the more that you give to your company, your team, the better is going to be and sometimes they give too much. And that creates a lot of issues on their personal life. And then those power problems in their personal life, impact negatively on the company. And I've seen from the employees of my clients. They say you can imagine how much we adore and respect our boss, but we see he's having all these problems in their life, him or her because he's giving too much to us. We want them to have a successful life. That's part of the balance. Yeah, so the biggest problems or mistakes?

**20:05**

Yeah, I definitely see this kind of sacrifice mentality, like, I need to give up all these things in order to have a successful company. That's, in fact,

**20:13**

I think, bad for everyone. Yeah, yeah. So number two are folks. So that, yeah, we believe the team has four things. First, build and lead a team, you have to really focus in believing and understanding that the better you build a team, the better team players that you bring to your company, the more your company is going to grow. And we've worked with a lot of CEOs that they believe they're like, like Robin Hood, right. They're like the best guy or the supermodel. And he was like, Yeah, that's great for stage one and stage two. But if you really want to build a company, to say three, and four, you have to figure out how to get the best in your company, helping you achieve your dream, and making the dream being part of their dream. That's number one. Number two, it's culture, and we really believe has to be cultural by design. And we help them kind of understand what's the right culture for them, and how to build a culture that will build the company, that people will operate, like they're in front of him or her, when they're not in front of him or her. Yeah, then three is growing their capabilities now that they're part of your team is your responsibility to grow them, and really understand how to do team development and grow them as leaders. And I believe that, the more you grow them, the more they're gonna grow your company. So really understanding. And we've You and I have heard this, well, if I grow them, they're gonna leave. And I was like, yeah, if you have a toxic culture and bad environment, yes, they're gonna leave. But if you have an amazing team, and amazing culture, if you grow them, they're going to be even more motivated of growing your company. Yeah. And then the fourth thing is what scaling up is all about all the execution part of scaling up is all about aligning the effort, you're a brother rate team members, you have a great culture, you're growing them now how to align them to work better as a team?

**22:03**

And how do you This is, I guess, how do you diagnose kind of assess these things? And and what's the process? Are you working on multiple ones? At the same time? Do you pick one at a time and focus on it for, you know, for a period what's what's your kind of implementation strategy?

**22:17**



So the way I do it today, and I do it one by one, we're building all of these so we could help more companies going through the process usually tried to focus in what are the weaknesses of that? intrapreneur. And imagine, you go to a doctor and say, Hey, Doctor, give me the most potent medicine. And I imagine you got this question. A lot of times, he recommended what's the best book I need to read. And he's like, going to a doctor and give me the most the strongest medicine, oh, the doctor has to ask all these questions to understand where you seek off to give you the right medicine. So usually, we come with this grid of 48 things. And based on implementing scaling up and working with a CEO on the team, we begin identifying where these were the biggest weaknesses based on these 48 things. And then we understand that based on their stage and start working in whatever will give the most value at that moment.

**23:04**

Yeah. And I like that kind of depends on the situation they're in and what's going to help help the best, or what's the constraint that they're facing? And which one to focus on?

**23:12**

That's great.

**23:13**

And how long is this? You know, is this something it takes a couple of months takes a couple of years? Is this for forever? I mean, what's your experience in terms of, you know, CEOs that that have figured out the systems, how long have they taken to kind of develop a high performance system to help them with these things. So they

**23:28**

usually take them around a quarter to three months to get it, and it takes them two to three years to build it. You know, how even implementing scaling up and all these methodologies on the first quarter, they're going to have dashboards with numbers, but half of numbers are going to be wrong. And they have no idea, no experience, how to read them and take decisions based on them. Yeah, I always tell them, hey, implementing scaling up takes me a quarter, but for the system to melt to cook for you guys to really be able to get all the value it takes around the year. Yeah, same thing happens with this, you can understand your issue, start working on them building a plan, but it starts melting and really adding value to three years after that.

**24:04**

Yeah. So you mentioned this whole kind of decision point that that CEOs, founder CEOs have to make at some point of whether you go into phase three to ultimately get to phase four. I mean, what are some of the questions? Or what are the things that you look at or conversations that you have with leaders to help them decide, you know, are they ready to go into stage three? Do they really want to go into stage three, give us a little insight on that conversation.

**24:26**

So I believe there's two very important decisions that you have to take regarding selling your company and all that. So one is when you're on stage two, if you want to stay as a lifestyle business, and really create the systems or procedures for you to get maximum cash flow, and having a big lifestyle, right be able to go two months on vacation and things like that. That's the first decision. If you really want to build an asset that is sellable, or you want to generate or keep a company that generates cash flow. And that's the decision you have to take on stage two. And then whenever you go after stage three, when they You're doing around 10 to

15 million in revenue. Two things interestingly happen. First is, there's a lot of buyers out there to buy your company. And the valuation of your firm goes to a different level, a company doing 5 million compared to a company doing 10 million, the valuation just doubles, not just because you're doing 10, it doubles, because the drama of the company and the like ability of the company being successful without the founder, it's 10 times better. So the amount of buyers after you're doing 10, or 15 million multiplies in quantity, and valuation. And then you have to decide if you really want to take it to the next level. And here's why it's very difficult. Whenever you're doing 10 to 15 million, if you sell it at that point, you get what we call your freedom point, you get enough cash for you to retire the rest of your life. And we see a lot of CEOs saying hey, I'm doing 10 million now, I could probably get a check of 10 million, I just invested in bonds or something very easy. I'm done the rest of my life. So if you still want to scale it, you're going in in a state where we call stage risk on that, yes, you could take it above 10 million, that you probably don't need more than 10 million to live a great life. So you're putting at risk all that 10 million, or let's security to try to get 10 2050 or 100 million more, but the risk is way higher.

**26:21**

Yeah, I like the equation or I like the acknowledgement that sort of this diminishing return right after some point, you know, an additional dollar of personal revenue, personal income is, you know, diminishes, right? Like, like, there's only so much you can do by so is it really worth risking? You know, that what you have now to get another 10? Because the second 10 is not going to be nearly as beneficial?

**26:44**

Exactly. Hey, I'm gonna give you 10 today, what are you going to do with your life? Right? And you could describe your life? And then say, if I give you 20, will you change too much of what you said? First? No, you change very little like, I'm not gonna buy a plane, I'm not gonna do that. I'm not going to buy a \$5 million boat. Like, that's not me. So my life will change very little between 10 and 20. Will you change a lot between 10 and 100? Yes, but the risk I'm gonna have to put over the first 10 to get to 100 is really, really high. Yeah, that's, I believe the second big decision you have to take in your business.

**27:17**

So tell us where where can we find information on the book, if we want to learn more about you? What's the best place to get that information?

**27:22**

So growthinstitute.com is my company, if you google me, I know social media, in most social media, Facebook, LinkedIn, on the rest, Growth Institute that's where I publish most of my content. And the link that we're going to put here is going to give you a lot of slides. So you could kind of walk through what I shared. And that's the basic of the book. And whenever the books available, that should be around the summer, end of the summer, we'll send you an email saying the books available, you could go and get it at Amazon or, or download some videos or something about it.

**27:51**

Perfect. Yeah, make sure that the link is in the show notes. So people can click through, get the slides, and then they get notified when you're when the book is launched and available. Daniel, thank you so much for taking the time today. It's really been a pleasure. true pleasure.

**28:01**

Thank you, Bruce.

**28:03**

Thank you for tuning into today's episode. Be sure to subscribe using your favorite podcast app so you don't miss our future episodes. See you next time.

**28:12**

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Eckfeldt & Associates is a strategic coaching and advisory firm based in New York City and servicing growth companies around the world. Founded and led by Inc. 500 CEO Bruce Eckfeldt, E&A helps founders, CEOs, and leadership teams develop highly differentiated business strategies and create high-performance leadership teams who can execute with focus and rigor. Leveraging the Scaling Up, 3HAG, and Predictive Index toolsets, the firm has worked with a wide range of dynamic industries including technology, professional services, real estate, healthcare, pharmaceutical, and cannabis/hemp.

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