



We are an Idea Meritocracy made up of passionate, awesome team members who come together to do Meaningful Work, to grow personally and professionally, and to believe in themselves.

1. Trust in Radical Truth and Radical Transparency

- 1.1. Realize that you have nothing to fear from knowing the truth
- 1.2. Have integrity and demand it from others
 - a. Never say anything about anyone that you wouldn't say to them directly
 - b. Don't let loyalty to people or fear of discussing hard things stand in the way of truth and the wellbeing of the organization
- 1.3. Be radically transparent
 - a. There is nothing to hide, so we should show up everything to the light
 - b. Share the things that are hardest to share
 - c. Make sure those who are given radical transparency recognize their responsibilities to handle it well and to weigh things intelligently.

2. SMB Is The Team And The Clients

- 2.1. Cultivate Meaningful Work and Meaningful Relationships.
- 2.2. Actively seek opportunities for individuals and the team to grow, and celebrate personal and professional growth.
- 2.3. We spend most of our waking week at work. Therefore, the work we do must be meaningful with a team we enjoy working with or it's not worth it.
- 2.4. Treasure honorable people who are capable, and work towards the best interests of the team even when you're not looking.



- 2.5. If a team member is acting out of alignment with the Principles, it will negatively impact the Meaningful Work and Meaningful Relationships; alignment must be achieved or we should decide to part ways.
- 2.6. The team cares deeply about the individual and in turn, the individual makes decisions and takes actions that will benefit the team
- 2.7. The team and each individual understand that we are supporting PEOPLE, not technology. The computers don't need us, the people do.
 - a. Respond to situations understanding you are helping PEOPLE.
- 2.8. For everyone to be successful, properly manage client perceptions
 - a. If they don't know what you did, then you didn't really do it!
 - b. Communicate clearly to the client your intentions to take action and descriptions of what the client needs to do
 - c. Follow up all verbal communication in writing via email (ticket)
 - d. Remember: with clients, no geek-speak!
- 2.9. Remember the 8 Pillars of Trust: Clarity, Compassion, Character, Competency, Commitment, Connection, Contribution, and Consistency
 - a. When we feel like we lack trust with a Client or Team Member, determine which of these C's is out of alignment, and fix that alignment, or determine to end the relationship

3. It Is Okay to Make Mistakes and Unacceptable Not to Learn from Them

- 3.1. Recognize mistakes are a natural part of growth
 - a. Fail well
 - b. Don't waste time feeling bad about your mistakes or those of others.
 - c. Remember to reflect when you experience pain



- 3.2. Don't worry about looking good – worry about achieving the goals
 - a. Get over “blame” and “credit” and get on with unemotional observance of facts.
- 3.3. Observe the patterns of mistakes to see if they are products of a weakness.
- 3.4. Know what types of mistakes are acceptable and what types are unacceptable and don't allow your teammates to make the unacceptable ones.

4. Get and Stay Aligned

- 4.1. Alignment occurs when the team is focused towards the same goal with a common plan and has put all efforts towards that end.
- 4.2. Recognize that conflicts are natural in great relationships because we are all different and see things from different perspectives. Use this healthy conflict to grow.
- 4.3. Know how to get aligned and disagree well
- 4.4. Be open-minded and assertive at the same time
- 4.5. Productive, meaningful meetings only
 - a. Make it clear who is directing the meeting, whom it is meant to serve, and what RESULTS you want to product from the meeting
 - b. Only hold or attend meetings that have a clear agenda provided in advance
 - c. Lead the discussion by being assertive and open minded
 - d. Stay on target; Watch out for “topic slip.”
- 4.6. When you have alignment, cherish it



- 4.7. If you find you can't reconcile major differences – especially in values – consider whether the relationship is worth preserving
- 4.8. Remember that the Principles can't be ignored by mutual agreement
- 4.9 Don't leave important conflicts unresolved, but it is ok to step away to consider your reaction to the issue and the other person's perspective.
- 4.10 Once a decision is made, everyone should get behind it even though individuals may still disagree
- 4.11 Remember that if the idea meritocracy comes into conflict with the well-being of the organization everyone will suffer
- 4.12 Recognize that if the people who lead the Company don't want to operate by the Principles, the principled way of operating will fail
- 4.13 Recognize that the most important decision for you to make is who you choose as your Accountable Parties.
- 4.15 Understand that the most important Accountable Parties are those responsible for the goals, outcomes, and processes at the highest levels.
- 4.16 Know that the ultimate Accountable Party will be the person who bears the consequences of what is done
- 4.17 Make sure that everyone has someone they are accountable to

5. Right Fit For The Culture And The Role

- 5.1. Only pick passionate people who mirror the Principles



5.2. It's NOT all about the skillset.

- a. Think through which values, abilities, and skills you are looking for (in that order).
- b. Make finding the right people systematic
- c. Look for people who sparkle, not just "a warm body that will just do."
- d. You can teach a skill, but people come with character and mindset.

5.3. Remember that people are built very differently and that different ways of seeing and thinking make people suitable for different jobs.

- a. Understand how to use and interpret personality assessments.
- b. Remember that people tend to pick people like themselves, so choose interviewers who can identify what you are looking for.
- c. Look for people who are willing to look at themselves objectively.
- d. Remember that people typically don't change all that much.

5.4. Think of your teams the way that sports managers do: No one person possesses everything required to produce success, yet everyone must excel.

5.5. Pay attention to people's track records.

- a. Check references.
- b. Recognize that performance in school doesn't tell you much about whether a person has the values and abilities you are looking for.
- c. While it's best to have great conceptual thinkers, understand that great experience and a great track record also count for a lot.
- d. Beware of the impractical idealist.
- e. Don't assume that a person who has been successful elsewhere will be successful in the job you're giving them.
- f. Make sure your people have character and are capable.

5.6. Don't hire people just to fit the first job they will do; hire people you want to share your life with.

- a. Look for people who have lots of great questions.
- b. Show candidates your warts.
- c. Listen for the "click" with the culture



6. Find The Root Cause, Solve The Problem

- 6.1. Design and oversee processes and your accountable areas to perceive whether things are good enough or not good enough, or do it yourself.
 - a. Assign people the job of perceiving problems, give them time to investigate, and carefully consider their insight.
 - b. Watch out for the “Frog in the Boiling Water Syndrome.”
 - c. Beware of group-think: The fact that no one seems concerned doesn’t mean nothing is wrong.
 - d. To perceive problems, compare how the outcomes are lining up with your goals.
 - e. “Taste the soup.” Keep checking in along the way when you’re addressing a problem
 - f. Have as many eyes looking for problems as possible.
 - g. Realize that the people closest to certain jobs probably know them best.

- 6.2. Be very specific about problems; don’t start with generalizations.
 - a. Avoid the anonymous “we” and “they,” because they mask personal responsibility.

- 6.3. Don’t be afraid to fix the difficult things.
 - a. Understand that problems with good, planned solutions in place are no longer problems.

- 6.4. To diagnose well, ask the following questions: 1. Did the desired outcome occur? 2. Who is responsible for the outcome? 3. If the outcome missed the mark, is the Accountable Party incapable and/or is the system/process bad?



6.5. Ask yourself: “Who should do what differently?”

6.6. Identify Root Cause

a. Which of the following items is the root cause of the problem:

- Leadership,
- Organization,
- Communication,
- Knowledge,
- Experience,
- and/or Discipline

6.7. Once Root Cause is uncovered, determine how to solve

a. Does a change need to be made or a new process created to:

- Checklists,
- Crosschecks,
- Mutual Support,
- Task Shedding,
- Standards,
- Metrics / Expectations

7. Manage the Organization Through Systems and Processes

7.1. Step back and look honestly on systems, processes, and yourself within them from the higher level.

- a. Constantly compare your outcomes to your goals
- b. Understand that a great manager is essentially great at engineering systems and processes
- c. Build great metrics.

7.2. If you aren't getting the desired outcome there is likely a problem with the system or process and/ or the understanding of the system or process

- a. Think of everything as a case study



- b. When a problem occurs, ask why that outcome was produced (to determine what to change about the process or system) and what to do about it (what action to take NOW to resolve it)
- c. When making rules, explain the principles behind them.
- d. Policies are a natural extension of principles
- e. Remember that there are exceptions to every rule (don't be too rigid)

7.3. Understand the differences between managing, micromanaging, and not managing.

- a. Managers must make sure that what they are responsible for works well.
- b. Think of managing as coaching – think back to the book “Chasing Excellence”
- c. Someone who deeply understands the job will be better at coaching their teammates than someone who doesn't
- d. You should be able to delegate the details, if you can't there's a problem

7.4. Know what your teammates are like and what makes them tick, because your team is the most important resource

- a. Regularly take the temperature of each person who is important to you and to the organization
- b. Learn how much confidence you can have in each teammate for certain tasks.
- c. Vary your involvement based on your confidence.

7.5. Clearly assign responsibilities.

- a. Remember who has what responsibilities and hold them accountable

7.6. Think like an owner and expect the people you work with to do the same.

- a. Going on vacation doesn't mean you can neglect your responsibilities; prepare yourself and your team.
- b. Force yourself and the people who work with you to do difficult things.
- c. WWLD



7.7. Don't treat everyone the same – treat them appropriately.

- a. Care about the people who work with you

7.8. For great leadership, great humility is required.

- a. Be strong, yet vulnerable at the same time
- b. Don't worry if your people like you or not and don't look to them to tell you what to do
- c. Don't give orders and try to be followed; try to be understood and to seek to understand others by getting in alignment
- d. The organization looks to you for how to act. You are a living example of the Principles. Remember to lead by example

7.9. Hold yourself and your teammates accountable and appreciate them for holding you accountable

- a. If you've agreed with someone that something is supposed to go a certain way, make sure it goes that way – unless you get in sync about doing it differently.

7.10. Work for goals that you and your organization are excited about and think about how your tasks connect to those goals

- a. Be coordinated and consistent in motivating others
- b. Don't act before thinking. Take the time to come up with a game plan.
- c. Look for creative, cut through solutions.

7.11 Recognize that everyone has too much to do.

- d. Don't get frustrated.
- e. Don't rush.
- f. Always be elegant in your delivery.

7.12 Use checklists, SOPs, and follow the process

7.13 Allow time for rest and renovation.