

# Fundamental Behaviors

## 1. BE A LEADER -

You can and do make a difference. Leave things better than you found it. Look for ways to brighten someone's life. Be the change you want to see. Do what you say and say what you do. If you are not willing to do it personally, don't expect others to do it for you. Be the example representing our core values.

Passionately engage in doing what's best for others. Be a servant leader and put the needs of others—be they clients, the community, or each other—ahead of your own. Even if a decision is to the short-term detriment of the firm, do what's best for others. There's no better way to build a reputation than to steadfastly put others first. Every day.

## 2. NEVER MISS A COMMITMENT -

Do what you say you're going to do, when you say you're going to do it. This includes being on time for all phone calls, appointments, and meetings. Never miss a deadline. Prepare and execute a strategy for all the steps it will and could take to meet the commitment / deadline.

## 3. WOW THE CLIENT -

It's all about the experience. With every experience, do the little things, as well as the big things, that surprise people. Make every interaction stand out for its helpfulness. Create the "WOW" factor that turns clients into raving fans. This includes both internal and external clients. Make the client a hero. Create and elevate their everyday.

## 4. DO IT FOR THE RIGHT REASONS -

Demonstrate an unwavering commitment to doing the right thing in every action you take and every decision you make. Especially when no one's looking. A policy is never the excuse when it is not the right thing to do. Always make it right.

## 5. SHOW UP IN EXCELLENCE -

Demonstrate a passion for excellence. Take pride in the quality of everything you do and. Have a healthy dislike for mediocrity. Good is not good enough. Always ask yourself, "Is this my best work?"

## 6. BE, DO, HAVE -

First we "be" what we want (peaceful, loving, inspired, abundant, successful, or whatever), then we start "doing" things from this state of being. Soon, we discover that what we're doing brings us the things we've always wanted to "have." You are the only one that can make things a reality for yourself.

## 7. GO TO SOURCE -

Address issues directly with those who are involved or affected.

Speak honestly in a way that helps to make progress. Tell the truth with compassion. Say what you mean. Be willing to ask questions, share ideas, or raise issues that may cause constructive conflict when it's necessary for team success. Be courageous and say what needs to be said when it needs to be said.

## 8. BE AUTHENTIC -

Your authentic self is who you truly are as a person, regardless of your occupation or the influence of others. It is an honest representation of you. To be authentic means not caring what others think about you. This may lead to you standing out from the crowd. To be authentic is to be true to yourself through your thoughts, words and actions. It means being able to sacrifice any relationship, situation or circumstance that diverges from your truth.

## 9. CHOOSE YOUR EMOTION -

In every situation you can choose how you feel. You can be human, but you should not allow yourself to be a victim for long. Choose emotions that can propel yourself and others positively forward.

## 10. GET CLEAR ON EXPECTATIONS -

Create clarity and avoid misunderstandings by discussing expectations upfront. Set expectations for others and ask when you're not clear on what they expect of you. End all meetings with clarity about action items, responsibilities, and due dates.

## 11. "CAN DO" CHAMPION -

Take personal responsibility for making things happen. Respond to every situation by looking for how we can do it, rather than explaining why it can't be done. Be resourceful and show initiative. We get paid to complete things, not simply to work on them or to put them in motion.

## 12. MAKE IT A WIN/WIN -

A win/win situation or result is one that is good for everyone involved. Win/win situations come through direct conversation of all parties to understand what a positive outcome looks like for all. Trust and respect may be one of the greatest outcomes in a win/win relationship.

## 13. 100% RESPONSIBILITY -

While effort is important, people expect results. Follow-up on everything and take responsibility to ensure tasks get completed. Set high goals, use measurements to track your progress, and hold yourself accountable for achieving elevated results. Take personal responsibility for making things happen. Don't wait for someone else to take action or solve the problem. Show initiative. If you see it, own it and make sure it gets done. You are responsible for everything that you delegate to others. If you don't like an outcome, ask what you did to create it.

## 14. LISTEN ACTIVELY -

Give others your undivided attention. Be present and engaged. Minimize the distractions and let go of the need to agree or disagree. Suspend your judgment and be curious to know more rather than jumping to conclusions. Above all, listen to understand. Write it down. Repeat as "this is what I heard you say."

## 15. BRING VALUE -

Find ways to help internal and external clients become more successful. Understand their goals and be sure everything you do is aligned around helping meet their objectives. Understand emerging trends and stay relevant. Quite simply, if we don't add value, there's no reason for us to be involved.

## 16. BE VISION ORIENTED -

Give your self time to plan out your future. Write it down, think about the costs you will have to "pay" along the way. Say yes to all the costs you accept. Share it with others and enroll their help. Track your success. You cannot get there if you don't know where you are going. This also works in projects, rocks and tasks.

## 17. MAKE DECLARATIONS INTENTIONAL -

Be aware of what you declare to your mind. If you tell your brain that you can, you will. If you tell yourself, why something cannot be, it never will. Your mind is a powerful gateway to your success. Declare ideas that help you achieve your best outcomes.

## 18. DON'T BE A VICTIM -

Stop blaming others. Be compassionate to yourself, practice gratitude, perform acts of kindness. Resist self-sabotage, forgive, and let go. Build self confidence, find the source of lessons learned, and challenge your perceptions of reality. Shift your mentality from victim to survivor

## 19. EMBRACE INNOVATION & GROWTH -

What got us here may not get us to the next level. Push your comfort zone rather than stubbornly hanging on to old ways of doing. Be willing to try the unconventional and to ask "What if?". Embrace technology to stay relevant and be more effective. Be excited by the possibilities/opportunities innovation and growth bring. Just because it has been done a certain way in history doesn't mean it is the best way for tomorrow. If you can make it better do it. Respect the past, innovate the future.

## 20. MAKE IT AN "AND" CONVERSATION -

You may be faced with a decision; you can have this or that. What if you could have both? Having both may look a bit different or the same. It is very possible the outcome of an "and" could be a win/win. Always push to find the "and." Be creative and curious, get out of the box and push on convention.

## 21. THINK AND ACT LIKE AN OWNER -

Understand our Clients and our Client's business. Make decisions by asking yourself, "What would I do if spending my own money, placing risk on my own business? Am I being a careful steward of the client's and the firm's resources?"

## 22. PRACTICE BLAMELESS PROBLEM-SOLVING -

Demonstrate a relentless solution focus. Don't point fingers or dwell on problems. To avoid making mistakes twice, identify lessons learned and use those lessons to improve ourselves and processes. Get smarter with every mistake. Learn from every experience.

## 23. FOLLOW THE PROCESS -

Follow our processes and procedures to ensure consistency and high performance. Make recommendations when you see gaps or opportunity for improvement for the benefit of everyone.

## 24. PRACTICE HUMAN CONNECTION -

Show people you care about them as individuals and not just as transactions. Communicate on a more personal level by speaking "live" instead of relying on texts or emails. Pay attention to the characteristics that make people unique. Use handwritten notes, personal cards, and timely phone calls to acknowledge their significance.

## 25. INVEST IN RELATIONSHIPS -

Get to know your clients and co-workers on a personal level. Talk more and e-mail less. Understand what makes others tick and what's important to them. Strong relationships enable us to successfully work through difficult issues and challenging times.

## 26. VALIDATE PEOPLE -

Recognize people doing things right rather than pointing out when they do things wrong. Regularly extend meaningful acknowledgment and appreciation in all directions throughout our organization.

## 27. KEEP THINGS FUN -

While our passion for excellence is real, remember that the world has bigger problems than the daily challenges that make up our work. Stuff happens. Keep perspective. Don't take things personally or take yourself too seriously. Laugh every day. Practice choosing to have fun and accepting others' version of fun.

## 28. ASSUME POSITIVE INTENT -

Work from the assumption people are good, fair, and honest. Assume intent behind their actions is positive. Set aside your own judgments and preconceived notions. Give people the benefit of the doubt. Empathize and see to understand what they may be up against.



**Bonus Behavior:**  
*Live the Core Values*