How We Lead at PERQ

'We can debate how to get there, but we can't debate about where we are going! And when we debate, logic always wins.'

This statement about alignment is at the core of our culture and is therefore the duty of our leaders.

From true alignment, comes the ability to build success, excitement and trust around one very clear and compelling mission. Trust is earned, not given. At PERQ, trust with our team is built through a specific management process that nurtures talent and maintains open communication both at the individual and group level.

However, like tackling any big goal, the path is never clear and requires continuous refinement and adjusting. This is where logic comes into play. Having talented people is only valuable if they are able to share their opinions. As leaders, our job is to create and nurture an environment where this is able to occur.

This usually manifests itself in the form of debates where a free flow of ideas and opinions are shared. With any debate, there are ideas that will win and others that won't. In the absence of both, there is no real way to know that the best ideas and therefore the best decision was made. The only way to foster a sharing of all ideas is for logic to dictate the decision, and when a better idea is shared we accept it, drop our position, and keep the discussion moving. Our job as leaders is to not only demonstrate this behavior, but to guide it during discussions with our teams.

Since the founding of PERQ, Scott and I have followed management and leadership principles like 'logic always wins.' These have created the opportunities for growth with the company and the individual team members that exist today.

Leadership is a huge responsibility and privilege that should never be taken for granted. People that join PERQ are trusting the company and manager to help guide and shape their career. Doing this takes both art and science. The information listed below is meant to be a guide to the core philosophy around what we think it takes to be a great leader and manager at PERQ. For this effort, I have broken it out into two categories.

- *Management – The Science: The management list focuses on the process and structure necessary to lead and develop talent at scale. These items aren't optional at PERQ, but rather integral pieces that are part of our promise to individuals who buy into our mission and culture overall. These are concrete, proven processes and tactics.*

- *Leadership – The Art: These are important lessons learned along the way. The application of the lessons has shaped the culture from not only how we execute, but how we interact. This is the 'art' that allows us to recruit and retain top talent, respond quickly to the market, while putting all of us in the position to create and take advantage of bigger and better opportunities.*

Management – The Science

- Communicate the vision, strategy and your department's role in it.
- Practice the 'Waterfall Effect'
    o Prioritize with objectives and never have more than 3.
    o Align objectives to metrics.
    o Align objectives and metrics to vision (this shows the individual how they make a difference).
    o Start with the end in mind.
- 1-1's and team meetings are a must.
    o Always have an agenda.
    o Agree upon action steps following each meeting.
- Direct and honest feedback constantly
    o Done both during 1-1's and reviews
    o PIP's are effective tools that shouldn't be a surprise to the individual receiving one.
- The concept of 'clearing the hedge' in a team creates room for growth to occur. While letting someone go is incredibly hard, no matter the circumstance, poor performance and detracting from the team are the 2 main reasons to do so.
    o Poor performance from an individual makes the other teammates jobs harder.
    o Nobody likes working with somebody who isn't happy with their role or the company.
- Your first team is the peers in the company at the same title or above. Always have the back of your first team. This usually manifests when an individual questions the direction or decision of another manager. ALWAYS support the manager in the moment.
- Show gratitude and remember money isn't the only way to show it. When someone does something well, no matter how small, tell them.
- When a rumor or gossip comes your way, stop it either by getting everyone in the room or coaching the individual on what to do to stop it.

Leadership – The Art

- Lead by example. Always be prepared. Your team will follow your lead.
- Let them solve the problem. Ask good questions to help lead them.
- Success and opportunity for everyone in the company comes from the acquisition and development of talent.
- True talent pushes you as a leader to be prepared and to stay ahead. Do whatever you can to find these people.
- Power is taken, not given.
    - When you have a report wanting to take power, let them. If they handle it, let them take more. This is how both of you grow.
- Attitude is everything and you set the tone. Remember with the desire for growth, comes the inevitability of big challenges to solve.
- We have challenges. Not problems.
- Demonstrate confidence, but always be humble. Your team needs both from their leader.
- Learning is how we grow and keep up.
    - Find outside experts, ask questions, and have them challenge your opinions.
    - Constantly search for new sources to learn.
    - Always share this knowledge with your team.
- Getting advice and feedback from your team and outside network shows maturity, not weakness.
- We are a handwritten note company. Gestures like this are meant to be genuine and should be done whenever a situation dictates.
- What matters is getting it right, not being right – Logic wins.
    - When you realize you're on the wrong side of the debate, admit it and move on.
- Be proud and excited if someone leaves to take advantage of a bigger opportunity that we can't provide. It is the ultimate validation of talent.
- Always leave the door open for a return if talent leaves. It has happened multiple times in our history and only because of our respect for the individual as they left.

Resource and Guide to Meeting Agenda Topics

General 1-1 Agenda: *Frequency should be relevant to role and desired updates. It will change dependent on the individual's workload and performance. It should be monthly at a minimum.* ***Agenda should always be sent ahead of time***

I.   **Align on Objectives:** Top 2 or 3 priorities that the individual is working on. Always start by aligning to these objectives by asking if the individual agrees that they are the correct ones. The individual should be prepared to update each objective, including what has happened and what will happen next.

II. **Metrics Update:** This should be a discussion, led by the individual, on both the metrics and story behind them. This is a time for questions from the manager, while encouraging discussion from the individual. The individual should be well prepared and the expert on the metrics and the updates behind them. Action Steps should be an outcome from this section.

III. **Initiatives/Projects**: Start by aligning on desired completion date and outcome for any project or initiatives. Discussions should be focused around understanding progress while brainstorming different tactics to keep the project on time with a successful outcome. The manager's goal is to help remove any obstacles, internal or external, that prevent the individual from being able to complete the project.

IV. **General Topics:** These are ideally provided ahead of time from both parties. The topics are usually broad and are meant to either be discussed or just a place for general updates. They include things like challenges, concerns, questions, problems, ideas for improvement, and idea sharing that could lead to initiatives. It is also the place where the manager injects company updates and anything that continues alignment between company vision and goals to that of the individual.

V.   **Personal Check in:** This is a time to allow for open feedback and dialogue that may not come up in ongoing performance conversation. How is everything going? Anything I can do to help? Anything I can do that I am not to help you? Are you happy in your current role? These questions will hopefully create an open environment where the individual feels comfortable sharing something they might not otherwise if these types of questions weren't asked.

VI. **Align on Action Steps**

Team Meeting Best practices: *Below is a list of different agenda items that are used in PERQ. Some of these aren't applicable to every team meeting, based on the size of team and the department's responsibilities. Agenda should always be sent ahead of time.*

- Individual Check in:
  - Team Check in: Each person gives a score of 1-10 on personal and business life with some color commentary
    - o Best Personal/Best Business with a quick blurb on each
    - o One Word Open/One Word Close
    - o What are you currently most proud of?
- Program and current initiatives update
- Metric/Goal updates including update on Quarterly Department Goal for ½ day
- Open Book update: Question and Discussion from last recap. This allows a time for deeper dives and questions from the individual members.

- Retrospectives on project or big dev release
- PERQ Game update/Brainstorm ways to win steps
- Company related stuff: HR Policies, Offseason updates, Overtime, etc.
- Discussing 'Real Life' Scenarios
    - Individuals bring in scenarios and team brainstorms solutions. Manager brings topic and does role playing.