

2-CHAPTER
PREVIEW

SECOND
EDITION

CULTURE

by DESIGN

How to Build a High-Performing Culture
Even in the New Remote Work Environment



David J. Friedman

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2-CHAPTER
CHAPTERS 5 & 6
PREVIEW

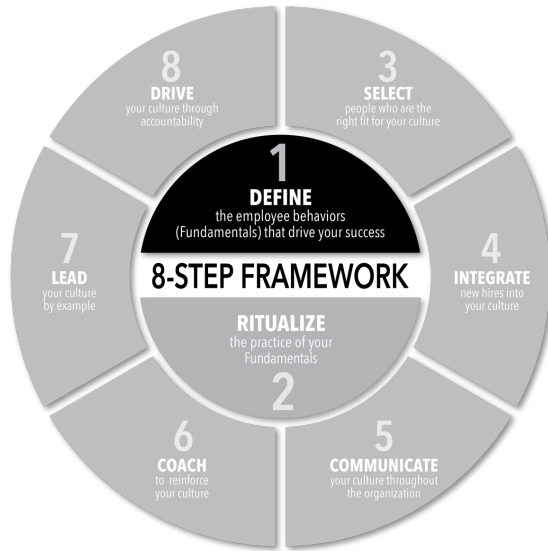
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DEFINE the employee behaviors that drive your success

To begin our discussion of how to define our culture with greater clarity than ever before, I need to draw an important language distinction for you. It’s a distinction I didn’t use to think about, and yet, it’s one of the most important premises on which the entire CultureWise® operating system is built. Specifically, it’s the distinction between what I call “values” and what I call “behaviors.”

Values vs. behaviors

Interestingly, in *Fundamentally Different*, I used the language of values and behaviors interchangeably, as if they were simply two

words for the same idea. In fact, the subtitle of that book is “Building a culture of success through organizational values.” Believe it or not, the first time I began to think about the difference between values and behaviors was when our then 19-year-old son, Ben, challenged me on it. Ben was home from college one summer and agreed to accompany me to one of my workshops. When the program was finished, and we got back into the car, Ben had about ten pages of feedback and questions for me! Perhaps his most important question, though, was this: “I heard you mentioning values and I heard you talk about behaviors. What’s the difference?”

My first answer was that they were just two different words that I used for the same concept. But over the next few days I began to think about his question more deeply. And the more I pondered it, the more I began to realize that they were, in fact, very different things, and that their difference was important. Let me explain how they’re different and show you why it matters.

Concepts vs. actions

A “value,” in the context of culture, is a principle that governs our actions. Examples of values are words like

- Quality
- Integrity
- Respect
- Commitment
- Passion
- Innovation

These are ideas or notions that we may subscribe to.

A “behavior,” in contrast, is an *action*. It’s something that I can literally see someone doing. Examples of behaviors are things like

- Practice blameless problem-solving
- Honor commitments
- Be a fanatic about response time
- Get clear on expectations
- Listen generously
- Do what’s best for the client

Do you see the difference? Values are ideas or concepts, while behaviors are actions. In an overly simplified way, you might think of a value as a noun (it’s a thing) while a behavior is a verb (it’s an action).

Note: For those who read Fundamentally Different, you may remember that I called the first ten of our Fundamentals our “core values.” I realize now that they weren’t values; they were behaviors. I just wasn’t thinking of that distinction at the time.

Wide disparity of definitions

So why does any of this matter? Well, here’s the issue: Values, because they tend to be so conceptual or abstract, can mean many different things to many different people. Behaviors though, because they’re more action-oriented, tend to be much clearer, and so they’re easier to guide, coach, teach, and provide feedback on. Let me share an example to make this point clearer for you.

One of the most common items I see on many companies’ list of core values is “Respect.” They want to create a culture of respect, where every person is treated respectfully, regardless of their age, position, background, education, or religion. And while

this certainly seems like a worthwhile goal, what does “respect” really mean? What it means to you may be quite different than what it means to me.

If you grew up in an inner-city gang, what it means to show someone respect, to earn respect, or to disrespect another person, might be very different than what it means in your family. If you grew up in many areas of the Deep South, you may have been taught to address all adults by saying “Sir” or “Ma’am.” In fact, it would be disrespectful to your elders not to address them in this way. But if you grew up in the Northeast, it would be unusual to use those terms, and not using them would imply no disrespect whatsoever.

If you were in a business meeting in Japan, who sits where at the table would be a way of showing respect, and you could inadvertently disrespect someone by sitting in the wrong spot. Recently, I was talking to a friend who’s a superintendent of schools in a large public school district. He was lamenting the fact that some teachers feel they’re being “disrespected” when they get a salary increase below what they expect. To him, their salary increase is a function of the budget and the available resources. It has nothing to do with respect.

My point, of course, isn’t that respect doesn’t matter. It’s simply that it means so many different things to different people that I don’t think the term, used on its own, is particularly helpful. Saying that we value respect or that we want to show everyone respect simply isn’t clear enough.

Most values tend to fall into this same trap. What does “quality” really mean? How do you define “commitment”? What does “passion” look like to you? Because behaviors are actions, they’re usually much clearer to understand and teach.

It may seem like I'm splitting hairs here, or making more of this distinction than is necessary, but as I take you through the entire CultureWise operating system, you're going to appreciate why this difference is so important.

Here's a video you can share with others that helps to explain this important difference: (www.culturewise.com/values-vs-behaviors/).

Two stories

Let me share with you two stories that helped to crystallize the importance of this distinction in my mind. I often tell these stories in my workshops.

Several years ago, I was giving a talk in the Midwest, and I was staying in a major chain hotel the night before the talk. As is typically the case, very early in the morning on the last day of my stay, an envelope was slipped underneath my door. The envelope contained my receipt for the stay. Like most hotels these days, I knew that I would also get a copy of the receipt sent to me by e-mail within 12-24 hours.

Normally, when I get the e-mailed version, I don't pay a lot of attention to it since I already have the hard copy. However, this particular time it happened to catch my attention because I noticed that the amount that was being charged to my credit card was *different* on the e-mailed receipt from the receipt that had been slipped under my door. And it was more! It wasn't a lot of money, but still, it should have been the same.

Curious to find the discrepancy, I compared the two versions, line-by-line. I quickly realized that the e-mailed version had an extra line. It said, "Room service \$5.35." This made me curious for two reasons. First, I hadn't actually used any room

service. And second, have you ever had room service for \$5.35?! Something clearly wasn't right.

So I picked up the phone and I called the hotel. The woman who answered was very friendly and she asked how she could help. When I explained the problem to her, she asked me to hold for a moment while she looked over my account. A minute or two later, she got back on and shared with me that the charge in question was for the bottle of Fiji water that was in my room.

While this seemed a lot to pay for a bottle of water, the more important issue was that I didn't actually use the bottle of Fiji water! In fact, traveling as much as I did in the pre-pandemic days, I was always on the "concierge" level, where they have free snacks and drinks, and all the water I can consume. When I shared this fact with the woman, she readily acknowledged that it made no sense for me to have drunk the expensive Fiji water, given all the free water available to me. She then went on to explain what *I* could do about it! She told me that the accounting office was closed at the moment, but that she would gladly give me their 800 number and that if I left them a voicemail, they'd likely take it off my bill. Of course, I explained to her an entirely different way we were going to solve this problem!

Here's the point of the story: Do you think the woman I spoke to thought she was giving me good service? I'll bet she did. She explained to me how I could solve my problem. The real issue, however, was that her definition of "good service" was vastly different from my definition.

And here's the larger point: Let's picture this hotel for a moment, and let's assume they have 200 employees. The general manager of the hotel calls a big meeting one day and announces to everyone that she wants to talk about their culture. She shares their vision and their mission and their six core values. Their first

value, she explains, is “service.” After all, they’re in the hospitality business, so what could be more important than delivering fabulous service to their guests? The problem, however, is that if they have 200 employees, they may have 200 different ideas of what great service looks like. So while it’s nice to say that one of our core values is service, it’s not clear enough to be implemented effectively.

The action form of values

That same year, I was passing through a smaller, regional airport when a sign on the wall caught my attention. The sign listed the airport’s vision, mission, and values. I thought this was pretty unusual for an airport, and being in the business, I stopped to read it more closely. They had the typical kind of vision and mission statement that I often see, but when it came to their values, they did something a little different that got me thinking.

I don’t remember exactly what their values were, but it was how they were constructed that stood out. Underneath each listed value, there was a series of bullet-pointed statements. It looked something like this:

We value service. We demonstrate this by doing the following things:

- Statement 1
- Statement 2
- Statement 3

We value quality. We demonstrate this by doing the following things:

- Statement 1
- Statement 2
- Statement 3

And so on. Each of their values included clear statements that described the observable behaviors that helped give the values life and meaning. In fact, you might think of behaviors as “values in action.” They’re the action form of the value. They’re what you do to live to or demonstrate the value. I thought that was a pretty smart approach, and ultimately, a much more useful one than simply creating the standard list of one-word core values.

Two methods for defining your culture

Having worked with hundreds of companies across the country in so many different industries, helping them to more clearly define what they want their culture to be, I’ve discovered that there are many different approaches we could take to this process. And while I want to be clear that there’s no “right” or “wrong” method, there are two approaches in particular that I’ve found to be especially effective.

The first method follows the airport’s approach. We could define the core values that are important to us, and then for each value, we could write the corresponding behaviors that help us to live to that value or to demonstrate it in action. This approach is very straightforward and logical, and brings valuable clarity to how you define your culture. I’ve seen many organizations use this method with great success.

There’s another approach, however, that I used in my first company, without knowing about any of this, and it’s actually what all our clients use. Now this is one of those places I warned you about where I’m going to suggest something that flies in the face of conventional wisdom and may sound almost sacrilegious, so try to keep an open mind and allow me to explain the logic. And remember that it’s worked hundreds of times with companies who at first wanted to reject it.

In the second method, we skip the discussion of our values and we simply go directly to our behaviors. In other words, we describe the behaviors that we want to define our culture, without any need to tie them back to particular values.

Now here's where it gets really interesting. I used to say to people that either of those approaches is fine. If it works better for you, and you feel more comfortable organizing your behaviors around a set of values, then go right ahead. And if you'd prefer to skip the extra step, and more directly identify the behaviors without reference to the values, that's fine too. Since we're still articulating behaviors either way, and that's the most important part, it doesn't really matter how you get there. Right? Wrong.

While I used to suggest that either approach was fine, I no longer say that because I discovered something very interesting. It turns out that those two approaches will actually yield two different lists of behaviors! It was fascinating when I began to realize this and thought more deeply about why this happens.

Introducing a filter or constraint

When we use the airport method, notice that we're actually introducing a limiter, or a constraint, into our thinking. In other words, we're *limiting* ourselves to thinking only of the behaviors that tie directly to the values in question. An example may help you to see this more clearly.

In the airport method, we start by asking ourselves, "What are our values? What are the principles that we hold dear?" To make the illustration simple, let's assume that we identified four core values: Integrity, Quality, Excellence, and Service.

Then we ask ourselves, "What do we mean by 'integrity?' What are the specific behaviors that help us to demonstrate our

vision of integrity?” Let’s assume that we’re able to articulate four behaviors that make our definition of integrity much clearer. We then follow the same path for quality, excellence, and service. We now have four important values, and we’ve defined each in terms of the specific behaviors that help us to live to those values. Life is good.

But here’s the problem: It turns out that there are quite likely some behaviors that are really important to our success, but that *fall outside* the scope of the four values we identified. And we’re never even going to think about those behaviors or talk about them because we limited ourselves to considering only items that were tied directly to the four values in question. I often use the drawing on the following page to illustrate this phenomenon in a visual way.

Behaviors A, B, C, and D may be critically important to success, but because they fall outside of the boxes for Integrity, Quality, Excellence, and Service, we’re not likely to consider them!

To be clear, I’m not suggesting that these two approaches are diametrically opposed. In fact, they may overlap by 85%. But there may be 15% of behaviors that fall outside the scope of those previously identified values, and yet are significant drivers of success, and they’re never going to be on the table for discussion. Some examples may help you to see this more clearly.



Two examples

One of the behaviors that was core to us at RSI was a behavior (we call them “Fundamentals”) that I called “Set and ask for expectations.” These days, I usually just call it “Get clear on expectations.” I’ve always taught that we judge situations not by what happened, but rather by how it compared to what we *expected* to happen. In fact, almost every misunderstanding comes from two people having different expectations about what was to occur. There are lots of reasons for this, and I wrote an entire

chapter on it in *Fundamentally Different*, but suffice it to say that if we take the extra time to be more rigorous in our language and make sure that in every conversation we're crystal clear about the expectations, our effectiveness as individuals and as an organization improves dramatically. This is such a foundational principle that I virtually insist that it be included in the Fundamentals for every one of our clients.

So which value would that behavior fit under? To be honest, I have no idea, and I really don't care! I just know I want my people to do it. To take it a step further, if I had written my core values first, and only considered those behaviors that fell under the values, would I ever have thought about "Set and ask for expectations"? Possibly, but probably not. And yet it was really important to our success.

Here's another Fundamental that I insist be included for every one of our clients: "Practice blameless problem solving." In my observation, one of the biggest causes of organizational dysfunction is blame. So many people are more focused on avoiding blame, defending themselves, protecting themselves, covering up mistakes, and blaming others than they are fixing problems and learning. When we change that dynamic and we address problems quickly, learn from them, and improve our processes as a result of what we learned—without worrying about blame—the difference is remarkable. It's an incredibly powerful behavior. Once again, which value does that fit under and would it ever come up if we started with our values and only defined behaviors in relation to those values?

It turns out that there are a number of behaviors like these two that might be critical to our success that would never come up for discussion if we limited ourselves to considering only those behaviors that tied directly to our values.

Going in reverse?

Sometimes people ask me about going in reverse. In other words, couldn't we come up with our list of behaviors without restriction, and then see what values are implied or are inherent in those behaviors? My response is that we might be able to do that, but I'm not sure I see a good reason to try. Our ultimate goal is to define behaviors, as that's what will most effectively provide the necessary clarity to operationalize our culture. If we already have the behaviors, what's the point in going backwards? What purpose does that serve?

From a purely practical standpoint, it's also very frustrating because you end up trying to force behaviors into categories where they don't really fit, or you have some behaviors that might fit into several different categories. And then you get one team member who asks, "Can we have a value called 'Miscellaneous' because I don't know where to put this behavior?!" Ultimately, it's just not necessary.

Others argue that the values, being broader, give you an "umbrella" under which to capture behaviors you might not have called out specifically. In other words, they suggest that the values give people broad guidance so that as long as they're operating in a way that's consistent with the value, they know their actions are acceptable. While this makes some sense, when I explain how we're going to go about defining the behaviors, you'll see that, when pitched at the right level, the behaviors will accomplish this goal quite nicely. Trust me on this point for now, and I'm confident you'll see what I mean as we progress.

Another argument I sometimes hear for grouping behaviors under values is that the values, being fewer in number, will be easier to remember. While I don't disagree with this assertion, the goal isn't simply to memorize or recite them, but rather to *live*

them daily. And as you'll see shortly, the way we teach and practice the behaviors through the CultureWise operating system makes memorization unnecessary and unimportant.

For readers who feel particularly uncomfortable about “letting go” of values, let me be clear. I'm not suggesting that values don't matter or that they have no impact. It's actually quite the opposite. We all have values in our hearts and minds, and these values absolutely influence how we behave. They're influencing us, whether we've articulated them or not. I'm simply saying that while the values certainly exist, from an operational standpoint, listing or defining them isn't nearly as useful as defining the *behaviors* that we want to see practiced in our organizations. The behaviors are much easier to teach, coach, and guide. They're how we actually operationalize the culture.

I'm going to show you how to think of the behaviors that are important to you and how to write them clearly, but first, I want to identify three mistakes that companies frequently make when doing this work. By calling these mistakes out in advance, I'm hopeful that you can avoid falling into these traps.

Mistake 1: Too much collaboration

The first mistake I see too many organizations make in defining their culture is being too collaborative. Now this may sound odd to you, as many consultants advocate a process where you get the input of all the various “stakeholders” to determine the culture, from employees to customers, and sometimes even key business partners. They argue that this helps to ensure the culture you're creating is responsive to all the key constituencies, and helps to increase employee engagement.

I take a very different view. Beyond the obvious concern that including too many people can water down the result or cause us to solve for the lowest common denominator, there's a more foundational issue. At its core, defining the culture is a *leadership* function. In fact, it's one of the most important functions and responsibilities of a leader. Great leaders call out a compelling vision and then enlist people and marshal the resources to pursue and achieve that vision. They don't ask the organization where it would like to go. They create the vision and then make it happen.

I often call this a "design function." We're designing the extraordinary company that we want to create. We're not designing it around the wishes or desires of all the people who we coincidentally employ today. Rather, we're designing it around our vision of what we want to build.

Having said that, I'm actually a big advocate for the inclusion of the senior leadership team in this process. But let me be crystal clear about their role. I recommend including them *for their contribution to the leader's thinking*. Notice the words in italics. They're contributing to the leader's thinking. They're on the team because they're smart and they have good ideas and they have a lot to add to the leader's thinking. This isn't to make them feel good. They're being included because their contribution is valuable. But at the end of the day, it's the leader's responsibility to decide which behaviors get included and which don't. It's not a majority vote, and it's not a consensus. It's the leader who decides the vision.

For those who may be concerned that this "top down" approach won't ever work because employees haven't been engaged in the process, my experience is that employees get incredibly engaged in how the Fundamentals get rolled out. The engagement of the workforce is absolutely important. The mistake is in thinking that the only way to achieve that engagement is to include everyone in the design phase. As you'll see, the rollout process that I

describe in Chapter 13 creates amazing engagement throughout the entire organization.

I should offer one other “qualifier” to my comments about over-collaboration here: Most of my experience is with privately-held, entrepreneurial organizations, rather than public companies or others who may have Boards. In these cases, depending on your Board relationship, you may want to include Board members as contributors to the initial brainstorming, or even in the rollout process. Here again, while their support and advocacy is important, it’s the leader’s vision that should ultimately drive the culture.

You’ll find this video particularly helpful to explain why over-collaborating can be a mistake: (www.culturewise.com/over-collaboration/)

Mistake 2: Writing clichés

Too often I see organizations come up with a list of values or behaviors that include clichés that may sound good, but don’t actually mean much. My best example of this is when we say that we’re committed to “exceeding our customers’ expectations.” I see this statement framed in board rooms, listed on websites, and even painted on company trucks; and while it may sound powerful, are we really serious about it? I doubt it.

If we were, we’d surely be documenting every customer’s expectations, for how could we be sure we’re exceeding them if we don’t even know what they are? And we’d definitely be measuring the degree to which we exceeded them, since that’s one of our most important goals. And of course, if we kept exceeding their expectations, they would keep raising them and it would eventually become virtually impossible to continue exceeding them!

The goal in defining behaviors isn't to capture fancy buzzwords or phrases, rather it's to capture what truly matters to you. The key is to look *inside* yourself to identify the things that are meaningful to you. Here are some good questions to ask yourself to get you started:

- What are the things that, if done more consistently, would make your company amazing?
- What are the things that you often “rant” about? If you're not sure, ask those around you. (After all, you wouldn't rant about them if they weren't important to you.)
- What are the things that drive you crazy when you see them happening? If they drive you crazy, you have some energy and passion around them. What's the opposite of those behaviors? In other words, what would you like people to be doing instead of doing that which drives you crazy?
- Typically, in every department, we have at least one or more people who we wish we could clone. Think of the specific people you wish you could clone. What do they do that makes you want to clone them? Those are likely to be important behaviors. (Often it helps to visualize real people rather than trying to think of behaviors in the abstract.)

The reason this is so important is that it's very difficult to be a true and authentic leader of behaviors you really don't believe in, but have included because you heard them somewhere. And conversely, it's easy to be an authentic leader of the behaviors you're always talking about. The goal is to capture what's authentically you and write it down.

Mistake 3: Writing this as a marketing piece

One of the most common mistakes I see is trying to write this as a marketing piece. In other words, we try to codify our culture primarily for a customer audience. “You should buy from us because these are our five core values.” I don’t know about you, but I’ve never bought from a company because I read their core values. While I suppose it might possibly cause me to feel an affinity for them, I buy because they offer the right combination of price, product, and/or service.

This is not a marketing piece. This is the curriculum we’re writing for what we want to teach our people. This is the owner’s manual or the instruction manual for what it looks like to be a fabulous employee in our company. In other words, we’re writing to our own employees, not to our customers.

To be clear, there’s nothing at all wrong with sharing it with customers. At High Performing Culture, we share our Fundamentals with customers all the time, as do virtually all our clients. It’s how we talk about our culture, and it does become a point of differentiation. However, I would have written them differently if I was writing to our customers versus writing to my own employees.

If there are certain phrases or lingo that are common in your organization, this would be a good place to use them. At RSI, we had a Fundamental that we called “Practice A+ness as a way of life.” It was a phrase that we used all the time and it meant something very clear and specific to our people. It didn’t matter to me whether our customers understood it. It was written for our own people. The more you use your own language, the more it resonates with your people, rather than it sounding like “consultant speak.” In short, keep it real.

Brand vs. culture

One of the reasons I think organizations, and the consultants who work with them, make mistake #3 so frequently is that they confuse a “branding exercise” with a “culture exercise.” In a branding exercise, we’re trying to articulate for the marketplace what makes us different from our competitors. In a culture exercise, we’re trying to articulate the rules of engagement for how to be a fantastic contributor in our organization. While there could be some overlap, they have two very different goals. Let me share an example.

I was working with a client, facilitating the process of developing their Fundamentals, and the topic of acting with integrity arose. It’s a very important behavior that almost always comes up, and I strongly encourage it to be included for all our clients. The CEO was a little confused because they had recently gone through a branding project with a marketing consultant who suggested that integrity shouldn’t be listed as a brand differentiator because it was virtually assumed. In other words, it was simply a given, or a “price of admission” just to have a seat at the table.

From a branding perspective, I totally agree with the consultant. Integrity *is* just assumed and isn’t going to separate you from your competitors (at least the worthy ones). However, from a culture perspective, acting with integrity is an absolutely essential behavior that we should call out and teach and reinforce for the rest of our careers. As soon as we stop talking and teaching about acting with integrity, we run the risk of unethical behavior beginning to creep into our organizations.

Remember that branding is mostly targeted to our customers, while culture is mostly for our employees. As we articulate the behaviors we want to define our culture, we're writing to our own employees.

Developing your Fundamentals

With those mistakes out of the way, we're ready to learn how to define, with tremendous clarity, those behaviors you want to drive your culture. Before we dive in though, let me make one comment about nomenclature. I think it's helpful to have a name for our behaviors, as it gives them extra weight and importance. When I first developed this process at RSI, I chose the name "Fundamentals" because I thought these behaviors were fundamental to our success. Most of the companies we've worked with have followed suit and use that same name, and it's why we used to call the suite of methods, tools, training, and resources for institutionalizing your culture, the "Fundamentals System." (It's since been rebranded simply as CultureWise®) We do have a few clients who use other names (e.g., Basics, Tenets, Principles), but most use Fundamentals. For simplicity, throughout the rest of this book I'm going to use the word "Fundamentals" as an alternative for the word "behaviors."

Who should be included?

As I noted earlier, while the responsibility for authoring your culture lies with the CEO, I strongly recommend the inclusion of the senior leadership team for their "contribution to your thinking." Depending on the size of your organization, this is typically a group of roughly 5–8 people. If your leadership group is smaller, that's fine. You just want to make sure there are enough people to

get some dialogue and discussion going, and to get a variety of ideas on the table. If your group is larger, or if there are certain political dynamics that make it necessary or advisable to include more people, that's OK as well. The facilitation process can get a little clumsy when there are too many people, but I'd sooner have a few more people than exclude someone whose contributions and/or buy-in may prove valuable.

I'm sometimes asked about including non-management folks who may be influential workers among their peers, or who may be part of a "culture committee" consisting primarily of non-management employees. Here again, I'd follow the same guidelines as above. If you think their contribution will be significant and/or their participation will facilitate greater adoption among your workforce, then I'd err on the side of including them.

Establishing clear ground rules

Let me offer a warning here about a common mistake leaders make with regard to collaboration. You gather a group of team members and ask them to participate in a project. They contribute their ideas or feedback and then you choose to follow a different course or to accept some of their ideas and not others. The team members leave grumbling about why you even bothered to ask for their input since you weren't going to use it anyway. Does that sound familiar?

The mistake is in not setting clear expectations (a common Fundamental, by the way) around the role you're asking people to play in the process. Decisions can be made in a variety of ways. Sometimes it's best to vote and have the majority decide. Sometimes it's best to build a consensus. And sometimes you simply want input but you're going to make the final decision. Any of these approaches can be perfectly appropriate for different

situations. The problem comes when participants thought they were playing by one set of rules and you had in mind a different set. In this specific case, if you're the leader, it's important to let everyone know that their role is to contribute to your thinking and that you'll be making the final decision.

Brainstorming behaviors

Once you have your team together, I'd suggest setting aside 3–4 hours for the brainstorming process. It can be helpful to have a facilitator guide the process so that you can participate fully without having to spend time or energy thinking about the group dynamics.

If it's safe or logistically feasible to have your team physically together, it's great to do so. Our clients have often conducted their brainstorming as part of an off-site retreat or a strategic planning session. It's helpful for people to be away from the pressures of daily work so that they can think more freely.

If it's not safe or feasible to bring the team together, this session can still be done quite effectively virtually. Over the past year, we've conducted more than 90% of these meetings using Zoom. When using Zoom (or any other video conferencing tool), it's helpful for the facilitator to share her screen so that participants can see the list of behaviors that you've accumulated so far. This mimics the process of hanging flipchart pages around the walls of the conference room.

While you may likely have some legacy materials you previously created around your vision, mission, or core values, for the purpose of this exercise, I think it best to set those aside and begin with a clean slate. Allow yourself the ability to think freely, without being influenced by that previous work. When your list is

complete, you can always look back at any previous materials as a reference point to ensure that you've covered everything that's important to you.

I like to begin the brainstorming process by asking some of the questions I listed earlier in this chapter. I'll repeat them here for your ease of use:

- What are the things that, if done more consistently, would make your company amazing?
- What are the things that you often “rant” about? If you're not sure, ask those around you. (After all, you wouldn't rant about them if they weren't important to you.)
- What are the things that drive you crazy when you see them happening? If they drive you crazy, you have some energy and passion around them. What's the opposite of those behaviors? In other words, what would you like people be doing instead of doing that which drives you crazy?
- Typically, in every department, we have at least one or more people who we wish we could clone. Think of the specific people you wish you could clone. What do they do that makes you want to clone them? Those are likely to be important behaviors. (Often it helps to visualize real people rather than trying to think of behaviors in the abstract.)

With these questions on the table, you can now allow your group to contribute their ideas. As you hear ideas, have someone record them on a whiteboard or on a flip chart. It's important at this stage not to worry about wordsmithing; just get the idea recorded. Though we're not trying to wordsmith, it *is* still important to make sure we're clear about what the speaker means. Asking

some clarifying questions for that purpose is perfectly appropriate, and can be quite helpful.

One of the clarifying questions I'm often posing is "What do you want people to actually *do*?" Or said another way, "What does this look like *in action*?" For example, sometimes I'll hear a leader say, "There needs to be more accountability around here." While that may sound good, I'm not really sure what that means in terms of the specific behavior they're asking for. I might ask, "What would you see someone doing that you would say they're demonstrating accountability?" This may lead to a clearer behavior such as, "I want people to take ownership for issues rather than waiting for someone else to solve the problem." I would then write down "Take ownership."

Keep writing down behaviors for as long as people have ideas. I often describe this process as similar to cooking microwave popcorn. When you begin, there will be lots of ideas popping from everyone. Eventually, the ideas begin to slow until there's just one popping here and another one there. Don't worry about how many behaviors you wrote down; just capture what's important. I'll show you in the next chapter why the total number isn't a big deal.

As you go through the process of brainstorming your behaviors, here are some things to keep in mind:

Pitched at the right level

Behaviors, of course, exist on a variety of levels, and it's important that we're working at the right level in this brainstorming exercise. In an overly simplified way, I think of behaviors as being one of three types:

1. **SOPs** – Standard Operating Procedures, or SOPs, are tactical actions that you want people to take. For example, “Make seven sales calls each week” or “Submit your expense reports with 30 days.” While these are essential rules to follow for a successful company, they’re not a definition of our culture.
2. **Management Principles** – Management principles are guidelines that we want to follow from a corporate perspective, but they usually apply only to leaders or managers. For example, “We want to empower our people” or “We want to hire the best talent available.” Here again, these are important principles, but our Fundamentals should be actions that apply to all our employees.
3. **Principle-based Behaviors** – “Principle-based behaviors” are behaviors that apply to all people, but operate at the level of a principle. For example, “Honor commitments” is a principle, but it’s an action. “Practice blameless problem-solving” is a principle, but it’s an action. This is the level of behavior that we’re looking for.

One set of Fundamentals

We should be able to create one set of Fundamentals that applies to all departments throughout the organization. In other words, we don’t want to have one set for the sales department and another for the service department, nor do we want to have some Fundamentals that are only relevant for one unit. The best way to overcome this tendency is to “elevate” the behavior to the larger principle.

For example, sometimes I'll hear, "I hate when we have mistakes on our proposals. I want the sales people to double-check their quotes before they send them." While double-checking quotes is important, the larger principle here might be called "Pay attention to the details" or "Do it right the first time." Paying attention to the details would be as applicable for the receptionist as it is for the salesperson or someone in the plant, or the warehouse, or a truck driver.

While we want to state the Fundamental in a way that's broad enough to apply to everyone, we want to teach it to people in a way that's context specific. What it means to "Be a fanatic about response time" is different if you're a salesperson or a receptionist or a bookkeeper, but the overriding principle is just as applicable. We just want to teach it in a way that's relevant and meaningful to the person in question.

Here's a helpful video that summarizes how to conduct the brainstorming process: (www.culturewise.com/brainstorming-behaviors/)

Should our behaviors be "aspirational"?

A question I often hear from clients is, "Should defining our culture should be 'aspirational' or should it be a description of how we 'really are' today?" There are some writers and consultants who caution leaders about being aspirational for fear that team members might push back or become cynical if we describe behaviors that we don't currently practice very consistently.

I take a different view. I absolutely think we should be aspirational. After all, the whole point of the exercise is to describe the amazing company we're trying to build. Earlier in this chapter, I described creating the culture you want as a "design function."

This is a visioning exercise. We're trying to envision our best selves, and then we're going to do the work to bring that vision into reality.

We're not claiming that this is how we are today. Rather, we're calling out how we want to be; and when we fall short, as we surely will, we use it as an opportunity to coach and support each other along the journey.

And by the way, if we already have a pretty good company (and most readers of this book probably do), our vision for the future probably borrows heavily from who we are today. There are likely many behaviors that have been foundations for our success, and we don't ever want to stop teaching them. We want to make sure that we capture those behaviors so that we can codify them and institutionalize them. In addition, there are likely a fair number of things we need to do better or differently in the future to achieve our vision. We want to capture those as well. So the definition of the culture we want to create is usually a combination of both the behaviors that have led to our success so far as well as the behaviors we need to improve upon.

You'll find this video helpful in explaining why we want to be aspirational: (www.culturewise.com/aspirational/)

Categories of behaviors

While it's not necessary to group your Fundamentals into any kind of categories, thinking of behaviors in categories helps some people to brainstorm better. If you find that helpful, here are four categories you might consider to spur your thinking:

1. *How we work with customers* – These are Fundamentals that describe customer-focused behaviors. For

example, “Deliver legendary service” or “Be a fanatic about response time.”

2. *How we work with each other* – These are Fundamentals that describe ways of working together more successfully. For example, “Practice blameless problem solving” or “Share information.”
3. *How we do our own work* – These are Fundamentals that address the way we approach our work. For example, “Demonstrate a passion for excellence” or “Be relentless about improvement.”
4. *Our attitude* – These are Fundamentals that describe the attitude that we display. For example, “Embrace change” or “Assume positive intent.”

How unique should our Fundamentals be?

Having taken hundreds of organizations through this process, it’s not surprising that I’ve seen a lot of commonality among Fundamentals. I say that it’s not surprising because companies are companies and people are people. In other words, what it takes to get a group of people to come together and perform in extraordinary ways isn’t very different whether it’s an engineering firm or an IT company or a construction company or a non-profit social service agency. As a result, there is a core group of Fundamentals that should be in virtually every company, and then many others that also appear frequently across a wide variety of organizations. In fact, if you looked at the Fundamentals for many of our clients, you probably wouldn’t be able to guess what industry they’re in.

To be sure, there are a few behaviors that might be unique to an organization. For example, those companies involved in manufacturing or construction will frequently have a Fundamental about safety, where a service business typically would not. And

one CEO may have a strong conviction about a behavior that another CEO feels less passionate about. But most Fundamentals aren't very different from one organization to another.

And remember our discussion about the difference between a branding exercise and a culture exercise. In a branding exercise, we're trying to describe for the marketplace what makes us unique. A culture exercise isn't so much about uniqueness as it is about organizational effectiveness. What it takes to be incredibly effective isn't all that unique. It's just that most organizations don't teach and practice the essential behaviors with enough consistency. In fact, I often say that the best people and organizations don't do anything that's so unusual; instead, they do what I call "ordinary things with *extraordinary* consistency."

This video will help you answer concerns about whether you're being unique enough: (www.culturewise.com/unique/)

Write explanatory descriptions

Once your brainstorming is complete, it's important to write a brief description for each Fundamental. The description should be 2–4 sentences that serve to explain a little more fully what you mean by that behavior. For example,

HONOR COMMITMENTS. 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. If a commitment can't be fulfilled, notify others early and agree upon a new deliverable to be honored.

Notice how the description provides more clarity than does the simple two-word title. It explains what we mean by honoring our commitments. The description need not answer every question that might arise about the Fundamental. This isn't the place for it, nor would it even be possible. Throughout this book, we'll be discussing many other tools and opportunities for more robust teaching. This is simply a brief explanation that helps the reader to understand the essence of the Fundamental.

The bulk of the description should explain the actions you want to see people take, rather than being what I call "philosophical" statements. A philosophical statement is a statement of your belief or philosophy about the principle. For example, "Honoring commitments is critical to delivering great service." This may be a true statement, but it doesn't describe the action.

This is not to suggest that all philosophical statements should be avoided. Some are OK as they may add depth or nuance to the description, but the bulk of the description should be action oriented. Here's an example of a description that's mostly action, but includes an additional statement.

EMBRACE CHANGE. What got us here is not the same as what will get us to the next level. Be inspired by the opportunities that change brings, rather than stubbornly holding on to old ways of doing things. Be flexible and open to new approaches.

Notice how the first statement isn't an action, but it helps to provide context for the action statements that follow. Again, make

sure that the majority of the description explains the actions that give meaning to the title.

Make all titles actions

It's also important to make sure that every title is itself an action. While this may sound overly picky, it's a much more powerful statement when described in terms of action. The title "**OWNERSHIP**" is simply an idea. I may be in favor of it, or I may think it's a good thing, but it doesn't call me to do anything. The title "**TAKE OWNERSHIP**" is an action. It's an instruction. It tells me what to do.

When I created my original list of Fundamentals, I wasn't thinking about this difference, and so a few of my titles were written as declarative statements rather than actions. For example, Fundamental #25 at RSI was called "**BEING ORGANIZED MAKES A DIFFERENCE.**" Notice that there's no action being called for (though, of course, I did include actions in the full description). Today, I call that same Fundamental, "**BE OBSESSIVE ABOUT ORGANIZATION.**" It has much more power to it when written in this way.

Avoid "We" statements

The first time I helped a company (outside of my own) to write a set of Fundamentals, I made what I later realized was another mistake. I wrote each title as what I call a "We statement." For example, "**WE HONOR OUR COMMITMENTS**" or "**WE PRACTICE BLAMELESS PROBLEM-SOLVING.**" I thought it would sound more inclusive if I wrote them that way.

While it might have that impact, it actually serves to weaken the statement. When it's written as a statement of what we all do, it doesn't speak to me as individual and give me any personal direction or investment. Have you ever heard the phrase, "Shared accountability is no accountability"? If no one specific person has accountability, we all look to someone else for it. In the same way, if we all honor our commitments, it doesn't speak to me about my personal responsibility.

The same warning applies to our descriptions. Make sure the sentences in your descriptions explain what you want people to do, rather than making statements about what "we" do.

Picture a real person

As you think about how to write a good description, it's often helpful to picture real people in your organization. If you're trying to articulate the actions that describe "**TAKE OWNERSHIP**," picture some of your best people. Do you have anyone who you think is the world's greatest icon for taking ownership? If so, what does that person do that makes you say that? That becomes most of your description. If you don't currently have anyone who's a good example of this Fundamental, imagine you hired someone who was. What would they be doing that would cause you to say, "Wow! This person really gets this Fundamental"? The more accurately you can describe what you want to see people do, the easier it will be for people to understand it, and the easier it will be to teach and coach it.

Keep it positive

In most cases, it's better to describe what you *want* people to do, rather than what you don't want them to do. Instead of "Don't

be late,” it’s more helpful to say, “Be on time.” Give people a picture to live up to rather than a list of things to avoid. This is true both for the title of the Fundamental as well as the description.

While this is a good rule of thumb in most cases, there are some rare times when the negative form may be stronger, clearer, or more compelling. I’ve worked with a few companies in the food industry and we’ve included a Fundamental that we call, “**NEVER COMPROMISE ON FOOD SAFETY.**” This is a clearer and more powerful statement than if we tried to turn it into a positive.

Within the body of a description, I also sometimes use a negative statement if it helps to add clarity, but the bulk of the description should help the reader to know what you *want* them to do more than all the things you *don’t* want them to do.

One behavior at a time

Be careful not to combine too many ideas or behaviors into one Fundamental. The test I use to determine whether behaviors should be listed separately or combined is to think about whether the teaching around the component parts is robust enough that I’d hate to lose the chance to focus on each part because I blended it with other ideas.

For example, communication comes up as a major issue for almost every company. A Fundamental like “**COMMUNICATE EFFECTIVELY**” is too broad because there are so many things that need to be taught inside of that. Virtually all of our clients have at least three or four different Fundamentals related to effective communication. We call them:

- **LISTEN GENEROUSLY**
- **SPEAK STRAIGHT**
- **GET CLEAR ON EXPECTATIONS**
- **SHARE INFORMATION**

Each of these behaviors has so much teaching content that we would risk the ability to focus deeply on them if they were combined into a broad discussion of communication.

Sometimes the ideas are sufficiently similar enough that we don't lose much by combining them. For example, in my original set of Fundamentals at RSI, I had both "**HONOR COMMITMENTS**" and "**BE PUNCTUAL.**" Today, I would be more inclined to combine those as I view being on time as an example of honoring a commitment. I don't think we lose much by focusing on honoring our commitments and teaching the importance of being on time within that context.

How many behaviors should we have?

The question of how many Fundamentals is the "right" number is probably the question I'm asked most frequently, and it's also the one that surprises people the most. Let me start by saying that, of course, there is no "right" number. You should have whatever number of Fundamentals is necessary to cover the behaviors you think are most important to teach and practice in your organization. And to a certain degree, the number really doesn't matter much.

Having said that, I can share with you that having led hundreds of organizations through this process, the fewest I've ever seen is 18, and the most I've ever seen is 40. The average number of Fundamentals is between 25 and 30. My original list from RSI had 30, as does my list for High Performing Culture. I can also

tell you that virtually every one of those companies thought, in advance, that any more than five or ten would be too difficult and would never work. Almost none of those companies is saying that today.

Though this sounds counterintuitive, I promise that it will make perfect sense to you when you understand what we're going to do with these Fundamentals. Stay tuned, as I'll cover that in Chapter 6.

While the number isn't a major concern, there *is* still some outer limit where it begins to become unwieldy and perhaps overwhelming. As you look through the results of your brainstorming, you'll see that not every one of the ideas that was suggested has the same level of importance to you. That's the nature of brainstorming. You should feel free to eliminate those that you deem to be not as critical.

As a general rule, I try not to go over 30. At the same time, the most relevant issue is to capture what you think is important to success. If you get your list down to 31 Fundamentals and there's nothing you want to give up, then I'd encourage you stick to 31 rather than letting go of something important just to get to an arbitrary number like 30.

This video will help you address this issue as it's sure to come up among your leadership team: (www.culturewise.com/how-many-Fundamentals/)

An intention of permanence

Another question I'm often asked is whether we should expect our Fundamentals to change over time or even whether we should schedule periodic reviews of them to explore appropriate additions or changes. My answer here may surprise you as well.

The best way to describe the recommended approach is to say that we should work on our Fundamentals with what I call an “intention of permanence.” In other words, we should put the amount of time and effort into getting it right that would be appropriate if we were expecting it to last forever. We’re not simply “getting something out there,” figuring we’ll adjust as we go. Nor are we planning on reviewing them every year or every five years.

If these behaviors are truly foundational to our success, they *should be* enduring. In fact, in a changing, chaotic, tumultuous world, it gives people a sense of security to know that they can rely on the Fundamentals as a stable foundation for their work life.

For those who argue that we need to be flexible and responsive to our changing environment, I would suggest that the changing conditions should cause us to regularly evaluate our products and services, our strategy, our priorities, and our key initiatives to ensure that we stay relevant. But our culture remains the same. After all, what would change in our marketplace that would have us no longer wanting to honor our commitments or to practice blameless problem-solving or to get clear on expectations? These (and other Fundamentals) are foundational elements of success that actually help us to stay responsive to a changing world.

With regard to adding Fundamentals, rather than changing them, my experience is that if we created a good set of Fundamentals from the beginning, anything new that we might want to teach could likely fit somewhere within our existing set.

At the same time, I do use the word “intention” of permanence for a reason. It is literally an intention, a plan, a desire. If something comes up that’s so important that you must change your Fundamentals, by all means you should do so. They’re there

to serve you, not the other way around. It's just that we should go there carefully.

A good analogy is that of the U.S. Constitution. We've relied heavily on the Constitution for more than 200 years with relatively few changes. Further, we don't review it regularly to see what changes we might want to make. At the same time, the Constitution does provide a mechanism through which amendments can be adopted, but it's purposely an arduous and lengthy process. This helps to ensure that we make changes only with great care and thought.

At RSI, we practiced our original Fundamentals for many years without changing a single word. While I certainly learned things and could have made some improvements, I felt that the value of the permanence outweighed the value of the small tweaks I could have made.

This video addresses the question of how often you should change your Fundamentals: (www.culturewise.com/update/)

What do we do with our previous core values?

In my experience, most organizations have, at some point in their history, created some statements about their culture—perhaps a vision or mission or a set of core values. What to do with those legacy statements can be a perplexing question as you embrace the Fundamentals approach. Let me offer you an easy way to resolve this dilemma that's worked beautifully for so many others.

Broadly speaking, organizations who've done previous work on culture typically fall into two large buckets. The first are those who came up with a vision, mission, and values, perhaps even working with a consultant, put them on their website, and then

The Fundamentals In Action

Field Fastener, headquartered outside of Chicago, is a distributor of industrial fasteners, with approximately 200 team members working in Illinois, Texas, South Carolina, Mexico, and Taiwan. Notes the CEO, Jim Derry, “We had put a significant emphasis on our core values but were trying to figure out how to make them clearer. The Fundamentals, which we rolled out in 2015, gave us the method to describe the behaviors that are important to our culture and helped us to be more consistent across all our locations. We’ve even converted them to Spanish and have rolled this out in Mexico. While we didn’t let go of our core values, we describe our ‘Fieldamentals’ as the way in which *live to our core values.*”

rarely, if ever, talk about them. Most employees probably couldn’t recite any of it, and it plays no meaningful role in how the company functions. Sadly, this represents the majority of organizations. In these cases, I simply suggest that you forget about the previous work and start fresh by creating your Fundamentals.

The other bucket includes those organizations whose leaders, perhaps the ones more likely to be reading this book, have been quite serious about their cul-

ture. They may have a set of core values that they worked hard on, that are meaningful for them, and that they talk about frequently. In these cases, we don’t want to simply go to our employees and tell them “Never mind! Forget everything we’ve been saying about our culture. We have a new plan.” So how can we adopt the more practical approach of the CultureWise operating system without having to give up everything we’ve done before?

Here’s my recommendation: As I noted earlier in this chapter, when we develop our Fundamentals, we do so with a clean slate, not limited or influenced by any previous work we may have done. We then check our previous statements to be sure that

everything that's important to us has been addressed in the Fundamentals. When we roll out our Fundamentals to the organization, we describe them as the daily practices that bring our values to life. It might sound something like this:

“As you know, our culture is one of the most important ingredients in our success. And the five core values that we've always talked about are what define that culture. But what do those values mean in action? These 30 Fundamentals describe the day-to-day behaviors that help give those values life.”

We're describing the Fundamentals as the way in which we live to our values. To be clear, and this is very important, we're not trying to “map” the Fundamentals to our values. In other words, we're not saying that Fundamentals 1-6 equal Value 1 and Fundamentals 7-12 equal Value 2, etc. We're saying that, *as a group*, the Fundamentals are how we demonstrate our values in action. This allows us to focus fully on the Fundamentals, without having to “cancel out” the previous work we may have done. This approach has worked fabulously well every time.

Share this video with your team to help them understand how to pay appropriate respect to your legacy culture work: (www.culturewise.com/existing-values/)

Vision, mission, values

In this chapter, I've explained how values and behaviors are different, and why defining your culture in terms of behaviors is ultimately more useful. We've also taken a close look at how to go about defining those behaviors for maximum effectiveness. While my experience working with companies across the country in virtually every industry has shown me just how practical this

approach is, I'd be remiss if I didn't also touch on how Culture-Wise relates to the more traditional method of defining culture in terms of a vision, mission, and a set of core values. So let's do that now.

Vision

Almost every company, at some point, has done an exercise where they attempt to provide organizational clarity by defining a vision, mission, and set of core values. A vision statement is a description of some future state that you want to achieve. It strives to answer the question, “*Where* are we going?” It's typically aspirational and puts a “stake in the ground” to describe where you want to be five or ten years from now. This might include statements like:

- We will exceed \$100M in sales by 2025
- We will have the largest market share in our industry by the year 2022
- We will find a cure for breast cancer within seven years
- We will put a man on the moon by the end of the decade

The purpose of a good vision statement is to provide a clear, and ideally, inspiring goal for the organization. Being clear about where we're headed also helps the organization to make sound strategic decisions, since all decisions should help propel the organization toward its vision.

Mission

A mission statement is a statement of purpose. Its goal is to describe the reason the organization exists. It strives to answer the question, “*Why* do we do what we do?” Non-profit organizations almost always have a clear and compelling purpose, but most for-profit organizations also try to articulate a purpose. Beyond simply making money, is there some larger reason we exist? Here are some mission statements from large, well-known companies:

- To attract and attain customers with high-valued products and services and the most satisfying ownership experience in America. (Toyota)
- To bring inspiration and innovation to every athlete in the world. (Nike)
- To refresh the world, inspire moments of optimism and happiness, and to create value and make a difference. (Coke)
- To be America’s best quick-service restaurant. To glorify God by being a faithful steward of all that is entrusted to us. To have a positive influence on all who come in contact with Check-Fil-A.” (Chick-Fil-A)

Core Values

Core values act as a set of high-level operating principles for the organization. They strive to answer the question, “*How* do we go about doing our business?” Most organizations will articulate between four and eight values. They may include ideas such as:

- Quality
- Service
- Innovation

- Integrity
- Teamwork
- Transparency
- Respect

Much has been written about the millennial generation and their desire to do work about which they can be passionate, and the quest to be part of something larger than themselves, to make a meaningful difference. In order to attract, retain, and inspire these folks, organizations of all types try to articulate a truly compelling vision, mission, and set of values. So what's wrong with any of this?

To be sure, nothing is wrong with the goal. Rather, it's the execution that's often sorely lacking. Instead of describing something that's authentic, they manufacture lofty statements that are so vague and generic that they fail to provide either clarity or inspiration. What's worse, they often generate cynicism and eye-rolls. Here are three actual mission statements taken from company websites:

- Our mission is to promptly respond to our client's needs for quality professional services through the effective management of our personnel resources, utilizing our extensive experience and knowledge while we remain strongly committed to innovation, partnership, and our client's interest.
- Our mission is to provide our customers with the highest quality people, products, and services needed for their success, while allowing for profitability and growth of the firm.
- Our mission is to provide the most technologically advanced products with responsive customer service. We strive to achieve a fair return for our

suppliers and shareholders and a healthy, safe work environment for our Associates. We measure success by customer satisfaction, our industry reputation, a profitable business and the personal and professional growth of our Associates.

These statements are so broad that they provide almost no useful clarity. And they're certainly not likely to inspire anyone. Beyond their lack of utility, there's an even bigger danger: By the time the organization's leadership team finishes their work on drafting and polishing these statements, and puts them on their website and their walls, they think their work on culture is largely complete and they never take the next steps. The idea of culture is relegated to being intangible, lofty, amorphous, and not all that relevant to doing "real" work.

I'm obviously giving you examples here of how *not* to write these statements, and certainly there are organizations that do this work with great passion and authenticity. But my experience is that these are incredibly rare.

In the clouds or on the ground?

Rather than being lofty or impractical, defining "behaviors" as I've described them in this book is incredibly useful. People at all levels of the organization can relate to them. Behaviors are "on the ground" rather than being "in the clouds." They provide tremendous clarity about how we want to operate and what's expected.

To be absolutely clear here, I am not in any way against creating vision and mission statements. What I'm against are *vague and useless* vision and mission statements. My message to leaders is this: If you're not sure what your vision and mission are, keep thinking

about them. Keep working on them. But don't put out statements that you don't believe in simply to be able to check the box and say you have them.

I'd rather see you begin by defining behaviors and then go back to work on your vision and mission. This way we can see real impact and applicability quickly. If instead we start with vision and mission, we run the risk of getting too frustrated and never going further.

When I was running RSI, I struggled with this issue for years. Every time I read a book about culture or went to a seminar, I was told that we had to have a compelling vision and mission. So I'd go home and try to come up with one, but everything I thought of felt forced and "fake", and I simply refused to put out something that wasn't authentic for me. Eventually, we did have a vision and mission, but it took a long time before I had enough clarity in my own mind to articulate them. In the meantime, though, we were crystal clear about our Fundamentals, and we had an incredibly aligned workforce.

In case you're wondering, our vision was:

To be the best run small business in America

And our mission was:

To help small and mid-size businesses to be more successful by making their benefits work, and by inspiring them through extraordinary service and performance excellence

The vision truly drove my efforts to optimize every single aspect of our business, from how we did sales to service to recruiting to finance to strategic planning. It had enormous influence over how we prioritized our activities.

The mission recognized that we were in the benefits business and that we were trying to help our clients be more successful, but it wasn't limited to benefits. We also wanted to inspire them to run their businesses better because of their interactions with us. It meant that doing seminars on best practices and sharing what we were doing with others wasn't a distraction; rather, it was a core part of our mission.

At High Performing Culture, we don't yet have a vision because I'm honestly not certain what our long-term goal is. Eventually I'll figure it out. Our mission, though, is:

To transform people and organizations by providing them with the tools and the methodology to more consistently teach and practice the behaviors that drive success.

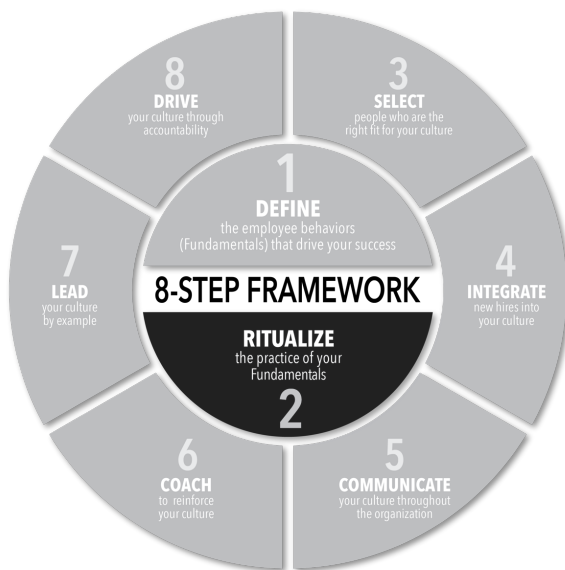
This mission is very real for us. The process we teach is truly transformational, and we each feel inspired by the opportunity to impact people and organizations so profoundly. The statement also describes, in simple terms, what we do to transform them.

Just like at RSI, we established our Fundamentals long before we crafted our mission statement. And while this may sound contrary to traditional thinking, my experience is that most of the time it's ultimately more practical.

Here's the bottom line: The first step to "institutionalizing" your culture is to define, with tremendous clarity, exactly what you want that culture to be. The fastest, most effective, most practical way to do this is to articulate the behaviors (Fundamentals) you want to see your people practicing. This enables you to truly operationalize your culture.

Once you've accomplished this successfully, you can always go back and work on your vision and mission to provide an even greater level of strategic clarity.

In the next chapter, we'll look at how to teach and practice your Fundamentals with the requisite consistency to ensure they become ingrained.



RITUALIZE the practice of your Fundamentals

I noted in Chapter 3 that creating rituals is one of the simplest and yet most powerful concepts I’ve ever learned. It truly is the key to helping us sustain our effort, and as a direct result, helping us to internalize the behaviors that drive success.

In this chapter, we’ll take a close look at what I mean by “rituals,” and I’ll share with you some examples of rituals with which you’re surely familiar. We’ll explore why rituals are so important and how to avoid this initiative becoming the “flavor of the month.” I’ll also share with you the story of an event that literally changed the course of the rest of my career, and how I applied my learning from that event to create the original Fundamentals at RSI. To make sure we can translate this concept into practical

action, I'll provide you with examples of rituals that are particularly effective in the workplace, and some key learnings I've realized from working with so many organizations. I'll also share ideas for how you can adapt your rituals for remote workers. Lastly, I'll offer you a simple way to understand and communicate the real power of rituals. We have a lot to do! Let's get started.

What is a ritual?

A “ritual,” in the way that I use the term, is some behavior or practice that you do over and over again until it becomes a habit. Doing it becomes almost reflexive or second nature. It's just “one of those things we do around here.”

Think about every time you go to a professional sporting event. What happens right before the opening kickoff of every NFL game, the first pitch of every MLB game, or the tipoff of every NBA game? Notwithstanding an occasional protest, the national anthem is played. It's not done only if we have enough time and can squeeze it in. It's not done only if someone remembers to do it. No; it happens every single time without fail. It's a ritual. It's just what we do.

Imagine for a moment that it wasn't a ritual; that it was, in fact, only done when we we're not running behind schedule or when we have enough time. Do you think it would happen at every game? I doubt it. It might happen consistently for the first few weeks, but sooner or later we'd have a night or two when we couldn't fit it in. Then we'd begin to lose momentum, and we'd slowly stop doing it. But we don't leave it to chance. Instead, we have a ritual or a routine that we go through before every single game, and this ensures that the practice is sustained.

When I was a child, we recited the Pledge of Allegiance at the beginning of each school day. Many families begin every meal with a prayer. At every military funeral, buglers play Taps. These are rituals. They're not dependent on our discipline, our motivation, or our memory. They're just what we do.

Here's a helpful video that explains this concept of rituals: (www.culturewise.com/what-are-rituals/)

Sticking with things

So why are rituals so important? Because it's our nature as human beings that very few of us are good at sticking with things. In fact, we're pretty darn poor at it. How many times have you started a diet or exercise program, only to give it up after a few weeks or months? How many programs have we rolled out at work, determined to make this one last, only to see it forgotten or pushed aside when we got busy or when a new initiative took its place? No doubt we've all faced these challenges.

Throughout my career, I've worked with hundreds of entrepreneurial CEOs, and one thing many of them have in common is a certain degree of Attention Deficit Disorder. Of course, I don't mean this in a purely medical way, but rather that many of them have short attention spans, get distracted easily, and get very excited about new ideas. They think that as soon as they've understood a topic, it's essentially done. They don't have to actually *do* anything about it, do they? Once an idea gets to the implementation stage it gets tedious and uninteresting, and before you know it, they've read another book or heard another speaker and want to implement something different. Does that sound familiar to you?

Rituals are what help us to stick with things when we wouldn't normally have the motivation or the discipline to do them ourselves. It's the ritual that keeps them going, not us.

A silly example

Let me share with you a rather silly example that I use all the time in my workshops. While it's a bit silly, I use it because it really helps to make this point clear. I'll be standing in front of a group of leaders and I'll ask them, "How many of you, when you woke up on Monday morning this week, said this to yourself: 'It's a brand new week, and this week I'm going to turn over a new leaf. I'm going to be incredibly focused, and really disciplined, and see if I can go every single day this week, and I mean *literally* every single day . . . brushing my teeth every morning.'" Not surprisingly, they all look at me quizzically, many of them laughing.

I'll feign as if I'm incredulous, "You mean, you *didn't* say that on Monday morning? So how many of you have managed to get it in every single day this week so far?" I'll ask. Of course, they all raise their hands, and when I ask them how they were able to pull this off, they quickly realize that it's because they have a ritual.

Most of us don't struggle to brush our teeth each morning. We don't debate with ourselves and have to somehow muster enough motivation to do it. No, instead, it's pretty much automatic. We typically have some set of activities that we do each morning that require almost no thought. We probably don't even remember doing them. It's just what we do. That's the power of a ritual! When an action becomes a ritual, it's no longer difficult to do. It's just what we do.

Here's the key idea I'd like you to consider: If there was a way that we could create rituals that were as automatic as brushing our

teeth or playing the national anthem, around how we teach and practice those behaviors (Fundamentals) we wrote in the last chapter, it would be a virtual game changer! Now it would have a chance to last for years and years into the future because it wouldn't be dependent upon our ability or discipline or motivation to make it stick. It's the rituals that would keep it going, not us.

This is a topic we can't overpower with discipline and motivation. We can't say to ourselves, "I know I've never been all that disciplined before, but this time, I'm really going make it last." No, you're not. Even with the best of intentions, you're likely to get busy and distracted with other issues or initiatives. So if you're wise, you don't think that you're somehow going to show up with a level of discipline you've never shown before; instead, you build rituals and you *let the rituals do the work*.

Shortly, I'll show you just how to do that. But first, let me share with you the story of how I learned all this. I shared this in *Fundamentally Different*, but it's an important enough story that it bears repeating here and I think you'll see how it anchors these ideas.

The Ritz-Carlton

This story dates back to December of 2003. Our company, RSI, was always known for extraordinary customer service, and yet, I was constantly thinking about ways we could be even better. I decided to plan some activity to help us think bigger about how to deliver truly amazing service. So we closed the office one Friday at noon, not telling our staff what we were going to do, only that we'd be doing some offsite activity. Here's what we did.

I chartered a couple of buses and these buses pulled up to our office in southern NJ. Everyone came out of the office and climbed aboard the buses, no doubt curious about where we were going and what we were going to do. We drove from our office over to Center City, Philadelphia, a short 20-minute drive, and we went to the Ritz-Carlton. Our plan was to have lunch there, and then to spend the afternoon in a meeting room doing some brainstorming about fabulous customer service experiences. As you might imagine, the reason I chose to go there was to soak up “Ritz-Carlton-ness,” if there is such a word; and I figured that if we went to the Red Roof Inn, we’d think Red Roof Inn-level thoughts, but if we went to a Ritz-Carlton, we’d think Ritz-Carlton-level thoughts!

Back in 2003, I didn’t really know much about Ritz-Carlton, other than that they had a reputation for amazing customer service. While I didn’t know for sure, I was guessing that it couldn’t have been by accident. Rather, there must be systems and processes behind the scenes that enabled them to deliver their brand of service with such consistency. It couldn’t be that they just hired nice people and it all somehow worked out on its own!

So I called my contact there and I explained my goals for the day. I asked if she could arrange to have someone come during lunch and spend a little time with us sharing some of those behind-the-scenes practices that drive their success. Not surprisingly, she readily agreed. A woman from their HR department spent about 20-25 minutes with us during lunch, and she shared with us two things that day that truly changed the course of the rest of my career.

The Basics

The first thing I learned is what's known as the Ritz-Carlton Basics. The Basics are 20 behaviors that describe how Ritz-Carlton delivers service. For example, "Escort guests rather than pointing out directions to another area of the hotel" or "Any employee who hears a customer complaint owns the complaint." These Basics are numbered 1 through 20 and they're printed on a laminated card that all team members carry with them. I thought this was fascinating, but the more important thing is what they *do* with these Basics.

The Daily Line-up

Here's what happens: Every single day, in every Ritz-Carlton property around the world, in every department and in every shift, the team members get together at the beginning of the shift and they have a brief 10-12-minute meeting known as the Daily Line-up. The first thing that happens in the Daily Line-up each day is that they spend a few minutes talking about the Basic of the Day. The rest of the brief meeting is spent on whatever is most relevant in that department that day, but it always begins with the Basic of the Day.

The Basics are reviewed like this each day, in order, until they get to #20, after which they go back to the beginning and do it again and again, every day throughout every team member's career. So in a given property, this may happen 30 or 40 times or more per day, given all the different departments and all the different shifts. And if today is day #14, it's day #14 in every Ritz-Carlton property in the world! Think about how powerful this is. They have more than 40,000 employees working in more than 30 different countries, and each one of them is in a Daily Line-up

today talking about the exact same Basic. That's how you drive real consistency!

I learned all this that day back in 2003, and it got me thinking about why that works so well, and more importantly, how we could apply these same concepts in our company. Though we obviously weren't a hotel, the principles behind the idea were very powerful and I figured they had to be universally applicable.

Applying the concept

Fascinated, I went home that night and began to think about my own Basics. What were the behaviors that were most important to me and to us at RSI? Some I had written years before, but others were phrases I always said and taught but had never actually codified anywhere. Over the course of a weekend I wrote out 30 behaviors that I wanted us to focus on and practice. I shared the list with my management team for their input, and I played with it and polished it for a few weeks until I felt it was ready to publish.

One of the first decisions I made was that these behaviors needed a name. Since these were "fundamental" to our success, I decided to call them our "Fundamentals." We created a wallet-size card to easily carry and show them, along with a variety of other printed materials. And this is where the Fundamentals came from.

It was great to write them down, but it was the Daily Line-up that really drove the adoption of the Basics at Ritz-Carlton. How could I do something similar at RSI? Our work environment wasn't anything like a hotel. Though we had departments, we didn't work in shifts and many of our people weren't even in the office every day, so I didn't think the Daily Line-up would work

for us. Instead, I decided that we would focus on one Fundamental each week, and that throughout the week, we would do several different rituals to help us to think about, talk about, teach, practice, and focus on that week's Fundamental.

The Weekly Insight

There were two rituals that I created when we first rolled out our Fundamentals at RSI, and we continue to practice these at High Performing Culture today. Because they work so well, most of our clients tend to do these two as well, and I certainly recommend them to everyone. In addition, there's a third ritual that I created in 2015, and, like us, most clients also do this one.

The first ritual I started at RSI was a weekly lesson delivered by e-mail and voicemail. Each Monday morning, I would send a message to the entire staff with the Fundamental of the Week (FOW) and a brief lesson that I wanted to share. The lesson might include a personal story or a recent example or whatever I wanted people to understand about the essence of the Fundamental. The lesson would typically be just a few paragraphs in length, and I sent it by e-mail and voicemail because some people prefer to read and some prefer to listen. A sample e-mail is included in Appendix C of this book. I did this for 30 consecutive weeks, or what I call the first "round."

When I finished the first round, I passed the baton to my senior leadership team, and I asked each member of the team to take a turn at sharing their thoughts about the week's Fundamental, and this continued for the next round of 30 weeks. As you might imagine, I wanted this to cascade throughout the organization rather than simply being the "David Friedman story."

When we finished the second round, I put a sign-up sheet in our kitchen and I asked the rest of our staff to pick a week that they wanted to be responsible for sharing the message of the week, from their own perspective, with their peers. And for years

The Fundamentals In Action

Berger Rental Communities is an award-winning property management company headquartered in Southeastern PA. A 2nd-generation family business with more than 275 team members working at 45 locations throughout PA, DE, and MD, they've been practicing their Fundamentals since late 2012. Berger has been named one of the best places to work in multi-family housing numerous times.

Observes Dan Berger, the CEO, "We're in the apartment management business. However, our success is really driven by our people, *not* our apartments. And that all starts with our intentional culture. Since we operate out of 45 different locations, I can't possibly visit them all with any frequency. So the only way we can create a consistent culture across all locations is by practicing our Fundamentals every week. Nothing is more important than our Fundamentals."

after that, at the start of every single week, a message would go out from the receptionist or a bookkeeper or a salesperson—literally, anyone in the organization.

Nearly every one of our clients now does this. We call it a "Weekly Insight." It's a very powerful ritual because it serves two key purposes. First, it gives the CEO a chance to teach; to share her perspective on the Fundamental and why it's so important. Second, the "cascading" nature of the ritual creates a wonderful opportunity

to transfer ownership to the rest of the staff. As an employee in an organization, I may find value in what the CEO has to say, but when I have to talk or write about it myself, I own it in a profoundly different and more impactful way. I watched this at

RSI and I've seen it in company after company. When employees take over the weekly messages, a profound shift in ownership of the Fundamentals always takes place. Incidentally, many of our clients share with me the e-mails that their employees write, and consistently, the employees put an incredible amount of thought and effort into their messages. This is their chance to shine in front of their peers, and they take on that challenge and opportunity with great gusto.

The importance of the CEO owning the first round

I mentioned in the preceding paragraph that we encourage the CEO to take the entire first round before responsibility gets passed to the leadership team. Beyond the significance of the leader having a consistent platform from which to teach, this ritual creates a powerful form of public accountability. Allow me to explain.

When you roll out a set of Fundamentals, it's perfectly natural for some team members to wonder whether this is really going to last, or if it's yet another "flavor of the month." And this isn't simply them being cynical. After all, if nearly every other major initiative eventually fell by the wayside, why would they think this will be any different? However, when the CEO gets past week 6 and then week 10 and then week 15 and beyond, team members begin to realize that this is different, that this isn't going away; and so they begin to engage more fully. If you're the CEO, knowing that you've made a commitment, and that employees are waiting to read what you write, it would almost be embarrassing if you quit after a handful of weeks. That's what I mean by public accountability. It forces you to keep going, and that shows your team that you truly are fully committed to this process.

By the way, almost every CEO we've worked with reports a similar experience at the end of their first round. On the one hand, they're sure ready to hand this off to the next in line; but they also describe how meaningful and gratifying it was. They loved the chance to express themselves, and they appreciated all the great feedback they received from their team members.

Here's a helpful video you can share that explains why it's so important for the CEO to own the first round: (www.culturewise.com/weekly-insight/)

Hedging the bet

I'm sometimes asked about whether we should screen or approve messages written by team members before they go out. While I don't think there's anything wrong with doing so, I've always chosen not to. There's, of course, a delicate balance between wanting employees to say what the Fundamental means to them and the risk that what they say totally misses the mark. I lean toward giving people a great deal of freedom to express themselves however they'd like. Having said that, there were a few things I always did to "hedge the bet" and increase the likelihood that the message would be on point.

First, I copied and pasted all my original e-mails onto one Word document and shared this document with people so that, as they sat down to write, they could at least have my own message in their mind as a reference point. Second, when it was time for a new round of 30, I would gather all those who had signed up and provide a brief 20-minute training session with tips and suggestions. Third, every few years I would take a new round and write them myself. I thought of it as my way to "true" us up back to center in case we started to see too much drift away from my original intent.

In Appendix D, I've included some tips and suggestions for making this ritual more effective.

Other ways to distribute the Weekly Insight

When we started sending the Weekly Insight in early 2004, we didn't have nearly the number of tools for distributing the message that we have today. E-mail and voicemail were our primary methods. Today, of course, there are so many more options.

Many of our clients choose to record a video for their weekly message. This can easily be done with an iPhone or any number of video recording applications on your laptop. Some clients post the weekly message on their intranet or they create Fundamentals "channels" using applications such as Slack or Microsoft Teams. Many companies post their weekly message on Facebook and LinkedIn. I can think of one CEO who created a wonderful coffee table book that sits in the company lobby and includes all of his original messages from the first round.

Perhaps the most impactful way we've found to distribute our Weekly Insight is through our mobile app, which is also called CultureWise. In Chapter 14, I'll describe the role of the app more fully and describe its many functions, but for our purposes here, note that almost all team members have a smart phone. Sending our message through the app allows it to reach everyone, regardless of whether they're computer-based or a field worker. Just as importantly, the app allows people to "like" or comment on the message to create greater engagement. Our message goes out at 6:00 each Monday morning, and all throughout the week various team members are continuing to contribute their own insights and reflections. What a tremendous, yet easy, way to increase engagement in our Fundamentals. Note, as well, that this ritual is just as

effective with remote workforces as it is with those who come to an office. They all have the same access to the message.

The first agenda item in meetings

The second ritual I created, patterned after the Ritz-Carlton Daily Line-up, is that we began every meeting with a brief discussion of the Fundamental of the Week. Unlike the Ritz, though, we didn't create a separate meeting for this purpose. Rather, we just used those times when we were meeting anyway and leveraged the opportunity to discuss the FOW. This would happen whether it was a management team meeting, a project team meeting, a department meeting, or even a customer meeting. If we had a meeting, we started with the FOW.

Nearly every one of our clients employs this ritual as well. The most effective way to do this is to have the leader engage the participants in a brief discussion by asking a question or two to get the dialogue started. I usually suggest that the leader of the meeting facilitate that discussion, but over time, it's even more impactful to rotate who's leading the discussion to get even greater engagement.

These discussions almost always help people to see new perspectives on the Fundamental and to notice additional ways that the Fundamental applies in their daily lives. This is where the nuance or the subtleties in the Fundamentals come to life. In fact,

The Fundamentals In Action

"While it may sound strange at first, we talk about our 'Fieldamentals' in every customer meeting. It's amazing how often our Fieldamental of the Week just happens to fit perfectly with something that's important to that customer or prospect. And it helps them to see us in an entirely light that other suppliers or service providers."

no matter how beautifully we wrote their descriptions, they can never stand alone. They only have meaning in the context of real life.

Written law vs. case law

In the legal profession, there's an important distinction made between what's known as the "written law" and what's called "case law." The written law refers to the actual statute. However, an entire body of additional interpretation is provided by judicial opinions written in response to real cases where the law must be

The Fundamentals In Action

Mike Mendiburu is the CEO of HighPoint, a global IT provider headquartered in NJ. When talking about building great business partner relationships, Mike says, "What we do is important, but *who we are is critical*. In any partnership, unforeseen circumstances will arise. Our partners need to know specifically how we'll respond in those situations. Our Fundamentals provide the answer. It's why we talk about our Fundamentals with every customer and with every business partners. The HighPoint Way defines who we are."

applied. You can think of the regular discussion of the Fundamentals in a very similar way.

The original description of the Fundamental is the "written law." But all the dialogue and discussion around the Fundamental and how it applies is what forms the body of "case law." For example, one of my Fundamentals is to "Do the

right thing, always." As simple as that may sound, in real life it's not so black and white. What's right for one may not always be what's right for another. Sometimes Fundamentals may even seem to conflict with each other. For example, you might have a Fundamental about demonstrating a passion for excellence and

another about working with a sense of urgency. How do we balance the two? How do we apply good judgment in these situations? The daily discussions around the FOW provide a regular forum to explore these issues and evolve a deeper understanding of how to apply the Fundamental in day-to-day situations.

Episodic vs. systematic

One of the reasons this ritual is so powerful is because it shifts our teaching from being “episodic” to being “systematic.” If our teaching is episodic, it means that the only time I get to teach about this principle is when a situation arises. If this week’s Fundamental is “Honor commitments,” I may or may not see an incident where we failed to honor a commitment or perhaps went to great lengths to honor one. In the absence of these instances, when would I have the chance to teach anything about the Fundamental?

By employing this second ritual, we’re creating multiple opportunities to talk about the Fundamental throughout the week. You may be in many different meetings this week, and in every one of them we’re going to talk about what it means to “honor commitments.” We’re not limited by having to wait for an incident to arise. Instead, we’re systematically talking about it throughout the entire week.

By the way, for those who wonder if it’s hard to get in the habit of doing this, it really isn’t. It’s like saying a prayer before a meal or playing the national anthem before a ballgame. But there are some suggestions that can make establishing the ritual easier. Here are two easy ones.

Ideally, every meeting should have a written agenda. If you create a template for meeting agendas that everyone uses, you can

simply make the first item on the template the FOW. That's pretty easy.

Here's a bit of a silly idea, but it's very effective. You make a new rule that if a meeting starts and the leader of the meeting forgets to begin with the FOW, he owes everyone in the meeting a dollar. Do this once or twice, and everyone will remember! It's a little silly, but it definitely works.

This is another ritual that can be done just as effectively in a remote work environment. My team at High Performing Culture has always been remote. We typically meet using Zoom, and we begin our meetings with the Fundamental of the Week, in the exact same way we'd do it if we were all physically together.

In Appendix E, I've included some tips and suggestions for how to get the most out of this ritual. And here's a video with some practical tips as well: (www.culturwise.com/meeting-tips/)

eMinder™

The third ritual that many of our clients practice makes use of a proprietary software tool known as eMinder™. When I built eMinder, I was trying to solve three challenges:

1. How can we keep employees engaged in a way that doesn't take a lot of time?
2. How can we help employers keep focused on the FOW in a way that doesn't take a lot of time?
3. How can we provide some measurement and accountability around the Fundamentals?

eMinder became the answer. Here's how it works: Each week on Monday morning, all employees receive an e-mail that simply reminds them of the FOW. On Wednesday morning, they receive

The Fundamentals In Action

eMinder has become an invaluable tool for setting clear expectations, according to Kathy Trahan, the CEO of Alliance Safety Council. Alliance, headquartered in Baton Rouge, LA, is a non-profit training and education company that provides safety and workforce development services to employers across the country.

At the end of each week, Kathy runs reports to identify those employees who answered the eMinder question incorrectly and meets with each person individually—not to scold them, but to speak with them, to understand them better, and to make sure they're clear on her expectations about the best way to handle different situations. "I have to take personal responsibility and ownership for making sure everyone understands exactly what I mean by each of our Fundamentals," notes Kathy. With roughly 100 associates, Alliance typically runs between 90 and 95% participation each week.

another e-mail with a scenario-based lesson related to this week's Fundamental. In other words, it gives them a situation to consider where they have to apply the Fundamental and choose the best response among four possible alternatives. Once the employee chooses their response, they immediately get an e-mail that provides feedback. The feedback is different for each of the four responses, and includes an explanation of what would be the best answer and why.

If an employee doesn't respond Wednesday, she gets a reminder on Thursday. And if she doesn't respond on Thursday, she

gets a final reminder on Friday. At the end of the week, the leaders can run reports by person, by location, or by department, in any date range, to assess how employees are doing in terms of participation as well as in answering the questions correctly.

Because it's multiple choice and it's only one question, it doesn't take much longer than a minute or two to participate. But it does force all employees to engage with the Fundamental every week, to apply their understanding to a real situation, and to get some useful feedback. It also spurs healthy discussion when they have questions about a scenario or disagree with a particular answer.

The mobile app

Earlier in this chapter I referred to the mobile app known as CultureWise. As I'll describe more fully in Chapter 14, the app has become a centerpiece for engaging team members in the Fundamental of the Week in a variety of ways. When we designed the app in 2019, we included eMinder as just one element inside the app. In other words, the weekly lessons and responses are delivered right to people's phones (as well as by e-mail). This makes it easier than ever for team members to participate.

There are other rituals that companies practice, and you have to choose ones that make sense for your organization and the way in which you work. I share these three here because they're the ones that we and most of our clients practice, and they've been proven to be effective. Most importantly, I share them to give you a clearer understanding of what I mean by rituals, and to help you begin to think about how you might apply this pivotal concept in your organization.

Three key lessons

I'd like to share with you three key lessons that I've learned over time about rituals.

The power of cyclical rituals

The first lesson I’ve learned is the power and importance of what I call “cyclical” rituals. Cyclical rituals are ones in which we have a finite list of items and we go through them one at a time, in order, until we get to the end, at which point we go back to the beginning and repeat the process over and over again. Playing the

The Fundamentals In Action

KNF Neuberger, a NJ-based manufacturing company with 150 employees, is the US division of a family of companies headquartered in Germany. At 9:15 every Monday morning, teams of 8-10 employees, representing both the shop and the office, meet throughout the building to discuss their Fundamental of the Week. On Fridays, team members in the shop meet again to discuss examples of how the Fundamental was demonstrated throughout the week. Notes their President, Rob Wassmer, “We’ve been practicing our Fundamentals since 2016 and they’ve just become a way of life for us.”

national anthem or brushing our teeth are rituals, but they’re not cyclical rituals. Think of the way Ritz-Carlton practices their Basics 1-20 and then they go back to the beginning, or the way we practice our Fundamentals 1-30 and then go back to the beginning. These are cyclical rituals.

The reason that cyclical rituals are so important really goes to how we learn and absorb information. If we

were like most companies, and we unveiled our 5 or 6 core values and asked our people to practice 5 or 6 things at once, I think it would be too much to process and to think about. But imagine that if instead, we said this week, we’re going to focus on just one thing. All week, we’re going to talk about it, explore it, practice it, and tune up our awareness about it. Do you think we’d learn it better if we did this? Of course we would!

Because we're only focusing on one idea at a time, we're going to get much deeper learning and penetration. But because we're also going to cycle through these ideas over and over, we get the best of both worlds. We get the increased learning that comes from the intensity of focus, but we also get exposed to all of them because we're going to keep cycling through them.

And this is why I said in Chapter 4 that the number of Fundamentals doesn't really matter! Regardless of the number, we're only going to focus on one at a time. And we're going to keep doing them every week for the rest of our lives. So, whether you have 9 or 14 or 27 doesn't make much difference. Of course, there is some outer limit. If you had 400 of them, we'd never get back to the beginning. But outside of the extreme, it turns out that the number just isn't that big of a deal.

Remember, too, that we're not asking our people to memorize or recite these. We're not stopping them in the hallway or on a Zoom call and quizzing them. We just know that if we take one at a time, and we keep practicing them week after week after week, sooner or later they're going to become internalized. And that's the real goal.

Leveraging existing rituals

The second lesson I've learned about rituals is the importance of leveraging existing rituals wherever possible. The more effort you have to put into creating new routines, the more difficult it becomes to sustain them because you're fighting against years of old habits. However, almost all organizations already have rituals they've built into how they operate, even though they don't necessarily call them "rituals." Every Tuesday morning is a leadership meeting. Every Friday afternoon is a sales call. Many companies do daily "huddles," and many do safety rituals. Look for ways to

work the Fundamentals into these existing rituals whenever you can.

Notice that in my company I didn't create a new meeting where we could discuss the FOW. Rather, we just took a few minutes of the meeting we were *already in* and used that as a chance to discuss the Fundamental. That doesn't take any extra time. We're already there anyway!

One of my favorite examples of rituals and the ease of leveraging existing ones is related to safety practices. Most companies I've worked with who are in construction or manufacturing industries practice some kinds of safety rituals. They may get together at the beginning of every day and review a safety topic or they may meet weekly to discuss safety. These are often called "toolbox talks." If you do a toolbox talk every week, I'd recommend just adding four or five minutes to your talk to discuss the FOW. If you do daily safety briefings, you might consider adding a few minutes to the Monday briefing and including the FOW. You already have the ritual in place. Just fold the Fundamental right into it.

Incidentally, when I ask these companies if it's hard to remember to do their safety discussion, they look at me incredulously. "No, that's just what we do," they'll say. That's what rituals are all about.

To take this example one step further, imagine we're comparing the safety record of two companies, A & B. Company A discusses safety every single morning in their toolbox talk while Company B simply posts a sign on the wall that says, "Be safe." Which company do you think is more likely to have a better safety record? No doubt, the first one.

Of course, the same is true for our culture. We can either post a sign on the wall with our vision, mission, and values, or we can

practice it and work at it every day. Obviously, the latter is going to have far more impact.

Going back to our safety example for just a moment, imagine you work in a company where you practice safety rituals every day. You're painting your child's bedroom one weekend and you're trying to reach a difficult part of the ceiling. You're tempted to reach too far from your ladder to maintain good balance, but it takes too much time to get down and move the ladder. What are you likely to do? I suspect that you'll move the ladder so that you can reach the area safely. Safety has been so drilled into your brain that you likely can't help but to see potential hazards, and their remedies, everywhere you look. Well, the exact same thing happens with Fundamentals. When we talk about them every day, they eventually become embedded in our consciousness. We begin to see the world through the lens of our Fundamentals. That's how and when they become "institutionalized."

Here's a video you'll want to share with others on your team about how to leverage your existing rituals:

www.culturewise.com/existing-rituals/

Creating interactivity

The third key lesson I've learned about rituals is the importance of creating engagement or interactivity to keep them fresh. For many organizations starting down this path, one of their biggest concerns is the fear that their rituals may become stale and meaningless over time, and that they'll simply be going through the motions and lose the intended impact. The key to avoiding this trap is to look for ways to create engagement.

Consider the ritual of starting all meetings with the FOW. If I simply stand in the front of the room and lecture about this week’s Fundamental, and you’re in a completely passive role, we

The Fundamentals In Action

Festival Foods, a 35-location grocery store chain in Wisconsin, uses an interactive “gaming” platform to engage its 8,000 associates. Every day, at some point in their shift, each associate logs into an online tool known as “The Hub.” Using iPads stationed in break areas, associates answer several questions that test their understanding of the Boomerang Basics (that’s what they call their Fundamentals) as well as role-specific knowledge. The tool keeps score, is fun and interactive, and even allows associates to compete with or challenge others. By making it engaging, Festival Foods has been able to maintain the consistency of the ritual without losing its effectiveness.

increase the risk that the message will begin to go in one ear and out the other. But if I ask you questions and get you to participate in a discussion, then the message is far more likely to stay alive. Your brain is active. You’re thinking.

You’re engaged. The more you can engage your people, the more meaningful the rituals will be, and the more imbedded they’ll become.

I noted earlier that it’s great to rotate who writes the message of the week and similarly, that it’s very powerful to rotate who leads a discussion. These are ways of increasing engagement and keeping the ritual relevant. Another good way to keep it meaningful is to use personal stories and/or to weave in examples from customer situations. Stories have a way of capturing people’s attention and helping them to see their relevance. These are far more engaging than a theoretical or conceptual discussion of the Fundamental.

The value of repetition

In the workshops that I do, I like to distill the essence of this entire concept of rituals into one very simple illustration. Let me share it with you here.

If you want to learn anything so well that you've totally mastered it or internalized it, whether you're trying to learn to be a great piano player, or you want to learn to speak a new language fluently, or you want to become a world-class tennis player, what's the most important thing you need to do? Practice, or repetition, of course!

I could spend all day explaining to you how to play the piano, but that's obviously not going to make you a great piano player. Instead, you're going to have to spend thousands of hours practicing so that it becomes almost second nature to you. And the same is true for virtually anything we want to master. In Malcolm Gladwell's bestseller, *Outliers*, he notes that it takes roughly 10,000 hours of focused repetition to achieve a level of mastery. According to Gladwell's research, this seems to be a common denominator across a wide variety of disciplines, whether that 10,000 hours is done in a few years or is spread across a lifetime. And while we could argue about whether the number is really 8,000 or 10,000 or 12,000, there's no question that repetition is the key to mastering something.

So, if we can agree upon that premise, that repetition is the key to internalizing something, then here's the big question for you: How many people do you know who *love* to do repetition? In my experience, the answer is "very few." For sure, there are some; but most people hate repetition. We get bored and distracted. We want to move on to something else. How many times have we tried to stick to the diet or exercise program or the initiative at

work? Sooner or later it gets tedious and we quit. That's just human nature.

Well, if repetition is the key to internalizing something, but most people hate repetition, that would seem to be a pretty big problem! So, what's the key to doing repetition? Hint: it's not trying to make it fun or creating more variety or just trying to be more disciplined. Not that there's anything wrong with making it fun or creating variety. These are certainly helpful, but there are only so many ways to make practicing scales on the piano fun. No, *the key to successful, ongoing repetition is ritual.*

Once something becomes a ritual, or a habit, it's no longer difficult to maintain. It's just what we do. Think about the national anthem or brushing your teeth or the daily toolbox talk or the Basic of the Day or the Fundamental of the Week.

It's virtually automatic. Again, it's just what we do. So, rituals are the key to keeping the repetition going and the repetition is the key to internalizing anything.

Now let's apply this basic thinking very directly to our culture. If institutionalizing our culture is nothing more than getting all our people to internalize the behaviors that drive success, they're not going to internalize them simply because we held a big company meeting and announced them. Nor are they going to internalize the behaviors because we put them in performance reviews or because we put posters on the walls. No, the only way our people will ever internalize those behaviors is when we teach them over and over and over again. And the only way we'll ever teach them with that much consistency, without getting bored, distracted, and quitting, is when we create rituals around them. That's why rituals are so foundational to success!

By the way, there are at least 2 bestsellers that provide an even deeper dive on this same basic concept. One is called *The Power of*

Habit, by Charles Duhigg, and the other is *Atomic Habits*, by James Clear. I think of “rituals” and “habits” as essentially the same. Both of these books demonstrate how creating habits is the key to success at almost anything.

The chicken or the egg?

Of course, there is a little bit of a “Which comes first, the chicken or the egg?” aspect to this concept. In other words, it’s easy to keep our practice going once we’ve formed a ritual or habit, but don’t we have to do something long enough for it to become a habit in the first place? There’s definitely some truth to this argument. It does take time for a habit to form, but there are things we can do to increase the odds of the habit taking hold.

For example, if we want to get in the habit of exercising every day, we’re more likely to be successful if we work out at the same time each day or if we have friends that we meet at the gym every morning, than if we simply try to squeeze it in when we get a chance. I noted earlier that creating a meeting agenda template with the FOW as the first item is an easy way to help establish the habit of starting all meetings this way. This is also one of the reasons I suggest you look first to leverage rituals that already exist. The more we can make it easy to do, the more likely the habit will become established, and once established, it becomes quite easy to sustain.

Rituals vs. discipline

Contrary to what some might think, practicing rituals does *not* take discipline. In fact, to a certain extent, rituals replace the need for discipline. Let me explain.

Put simply, discipline is the ability to get yourself to do what you know you should do when you don't feel like doing it. When you don't feel like practicing, what's your inner dialogue that gets you to do it anyway? It takes a lot of psychic energy to wage that inner battle and overcome the tendency to take the easy way out. And given how much energy it takes, it's not likely to be sustainable. Very few people have the internal fortitude and discipline to stay with it over a long period of time. Eventually, we give in and sink back to our old habits.

Remember that when something becomes a ritual though, it's no longer hard to do. We don't have an inner battle, and it doesn't take discipline to brush our teeth. We just do it. This is why rituals or habits are much more reliable than discipline.

We never stop

As you'll learn more about in Chapter 11, we recommend doing annual surveys to hold yourself accountable and to measure progress on your performance in living to your Fundamentals. In the comments section of these surveys, I'll occasionally read a comment that looks something like this:

“We've been practicing these Fundamentals for a year now. I think we all understand them. How long do we have to keep doing this?”

Here's my simple answer to that question: Do you think Michael Jordan stopped practicing free throws after he made it to the NBA or after he won his first championship? No, if we want to be successful, we *never* stop practicing. And the more we practice,

the better we get, the more we begin to see levels of depth and nuance we hadn't noticed before, and the more ingrained the Fundamentals become. After all, isn't that the ultimate goal?

In its simplest form, the Fundamentals System is a methodology to institutionalize our culture by clearly articulating the behaviors (Fundamentals) that drive success and then teaching and practicing them over and over again (through rituals) so that they become internalized. That's why these two steps are at the center of the 8-Step Framework.

Now that we understand the core of the framework, it's time to move to Step 3. In the next chapter, we'll take a closer look at how we can get better at selecting people who will be a good fit in the culture we're trying to create.

If you liked this 2-chapter preview,
you're gonna love the rest of the book!

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