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INTRODUCTION

What Does Company Culture Have to Do with Your HR and Team Management Strategy?

When Stefan Larsson took over as CEO of Old Navy in October of 2012, he says that the company "had faltered for a number of years." Having proven his revenue-building ability with Swedish fashion giant H&M, the hope was that Larsson could point the American brand's ship back in the right direction.

As recounted in Brene Brown's 2019 book, *Dare to Lead*, Larsson's approach to reinventing the company was novel—some might say visionary. Rather than cleaning house or pushing his employees to simply work harder and produce more, he sought to revitalize the company's culture from the inside out.

Larsson writes,

What was once an entrepreneurial, fast-moving, and empowering culture had over the course of several years of struggling performance become hierarchal, siloed, political, and filled with fear.

Most team members understood our collective challenges; they saw clearly what we needed to do and what stood in the way. However, very few dared to share their insights or voice their concerns in larger settings or take action on them, because of the fear of looking bad or making someone else look bad. To turn the brand around, our main job was to build a culture of trust.

In service to that mission, Larsson asked his team to stop judging outcomes as "good and bad" and eliminated shame and blame from conversations about those outcomes. He moved his management team into a single room with glass walls to visually mirror his goal of fostering togetherness. He began holding regular companywide "town halls" and "learning sessions" for managers, and he encouraged all employees at every level to begin contributing to conversations about what was and wasn't working for the company.

"The goal was to outlearn our competitors," says Larsson, and the effort paid off.

The result was twelve straight months of growth and an additional \$1 billion in sales for Old Navy over the course of three years. Not a bad outcome for a company that had previously been in decline.

DEVELOPING A CULTURE OF TRUST

The data is in: happy employees are more productive employees.

A <u>study of call center sales representatives</u> conducted by Oxford found that employees who rated themselves as "happy" made more phone calls and closed thirteen percent more sales in the same amount of time as employees who rated themselves as "unhappy."

<u>Another study</u> by the University of Warwick found that, after test subjects were given "happiness shocks" (meaning the opportunity to watch short comedy videos or eat treats), they were between twelve and twenty percent more productive than their counterparts in the control group.

A look at the list of Fortune Top 100 Companies to Work For between 1998 and 2005 (which is compiled using actual employee engagement surveys) showed a <u>fourteen percent increase in stock price</u> for companies with top engagement marks compared to an average increase of six percent for companies, overall.

And this isn't a chicken-or-egg phenomenon either: a <u>University of Iowa study</u> looking at thousands of points of Gallup Poll data found that it's not success that drives employee happiness. Rather, the happiness of employees actually causes companies to experience increased success, and not the other way around.

And what is it that makes employees happy? Ultimately, it all comes down to <u>organizational and managerial</u> structure and implementation.

More than extra financial incentives or regular company parties, employees want to know their role in a company and understand how they contribute to the company's overall purpose. They want to know what is expected of them and what it means to be successful at their jobs. They want to know that they are valued and appreciated, and that their contribution is recognized as meaningful.

WHAT DOES THIS MEAN TO YOU AS A BUSINESS OWNER AND/OR MANAGER?

This means that putting off planning your team management and HR strategy until your company gets "big enough" or until it is "convenient" is not only going to lead your employees to become disengaged (resulting in poor attitudes, reduced performance, and high turnover), but it's also going to affect your bottom line. That means less money for your business. Period.

Whether your business is already operating in multiple locations and supporting dozens of employees or you're just starting out on your own, if you haven't done so already, now is the time to start thinking about how to frame a culture that you can use to build an engaged and enthusiastic team.

The rest of this Playbook is dedicated to helping you develop a culture for your company and then use elements of that culture to make managing your business easier. Once you've put some sweat equity into that effort, you'll be better able to build a team management strategy that works for you, your team, and your company's unique set of values.

With the right plan in place, you will be more prepared to support a team that not only shows up to work every day for your company, but that also shows up for you, your managers, and each other. Because happy employees want to stay employed, they want to see their employers succeed, and they <u>tend not</u> to sue.

Now, without any further ado, let's start planning!

Define Your Company Culture

"Company Culture" is a buzzword that's been floating around for decades. However, an exact definition of the phrase can be hard to come by, and finding a definition that people agree on is even more difficult.

Some say it has to do primarily with the <u>behavior of the people</u> who work at your company. Others suggest it's essentially a composite of <u>everything your company does and says</u>. And, if you ask the <u>Society of Human Resource Managers (SHRM)</u>, it's actually called "organizational culture," and it's something that is "composed of unwritten rules and values" that determine "how things get done in your workplace."

That sounds pretty good, but it's not a complete picture.

What people do seem to agree on is that every company has a unique company culture, whether that culture was instituted deliberately or came to be organically throughout the life of your business. That culture attracts people who are cultural fits to available positions at your business, helps you decide which candidates to hire or pass over, and helps you set expectations for your employees and gauge their level of success.

And, though SHRM suggests that your company (or "organizational") culture is guided by "unwritten rules and values," we'd argue that your company culture is determined more by a set of guidelines than "rules," per se, and that there is actually value to putting pen to paper and outlining elements of your company's culture, including its core values, explicitly.

The very first place to put those guidelines and values is in your <u>employee handbook</u>, which is why a professionally written handbook will actually serve your employees as a guide on how to adhere to your company culture, in addition to acting as a depository for your <u>office and employee policies</u>.



Getting elements of your company culture on paper may be difficult, but it's probably the easiest part of the process. The real difficulty, and your number-one priority as an owner or manager, is actually living that culture and implementing it consistently.

- Michelle Richard, CEDR Solution Center Advisor





KNOWLEDGE IN ACTION: THINK ABOUT YOUR COMPANY'S CULTURE

Take some time to think about your company culture. How did it come to be? Is it, in your view, good or bad? Who helped put that specific culture in place? Was it structured deliberately or did it develop over time as a product of day-to-day operations? Answer the questions below in brief just to "prime the pump" when it comes to discussing or developing your company's unique culture.

Without leaning on industry-specific phrases (dental, medical, private practice, retail, etc.), **what adjectives best describe the character of your business?**

Don't feel obligated to stick to positive adjectives, either—if your business is high-stress or chaotic, for example, say so. The point is to be honest with yourself in order to determine what your current company culture is, rather than focusing on what you think it should be.

Choose between five and ten adjectives and list them below.

Think about why you chose the adjectives you listed above. Were they a product of your personal values? Were they based on what others have said about your business, or on how it feels to work there? Take some time to list a few factors that may have led to the development of your company culture as it stands right now.

Want to share your work and/or discuss company culture with other business owners and managers? Join CEDR's private Facebook discussion group, <u>HR Base Camp!</u>

the coming pages.

Create a current "cultural fit" employee persona: What sort of employee might be attracted to a business

YOUR EMPLOYEE HANDBOOK AS A GUIDE TO COMPANY CULTURE

One of the most important components of company culture is accountability. And, in order for accountability to be effective, it must be a two-way street. As a business owner and/or manager, you must be able to hold yourself accountable to your company's policies and core values first and foremost if you ever expect your employees to do the same.

The first place where you as an owner and manager must hold yourself accountable is when it comes to the myriad employment laws that apply to your business. Not only does this demonstrate to your employees that you are sincere about your obligations as an employer but, by being aware of and following relevant employment laws, it provides you the added benefit of legal protection for you and your practice.

When you are knowledgeable about those laws, trained on how to use your handbook to its maximum potential, and that book is one hundred percent in compliance, only then can you confidently make the best (and sometimes difficult) decisions about how to run your business and who gets to be on your team.

THE WATERS ARE ADMITTEDLY MUDDY

There is a lot of confusion among business owners and managers about what an employee handbook is, exactly, as well as how it should serve your company. And, admittedly, that confusion is justified.

The amount of misinformation out there about employee handbooks is startling. Much of it is aimed at convincing employers that quality employee handbooks are documents that can be built from cheap DIY templates, borrowed from other businesses, or composed by anyone with a basic grasp on the English language and the time to sit down and put the words into a document. There is also a prevailing idea that owners and managers should come up with the policies in their employee handbooks on their own.

As a company that has been in HR for more than a decade, we can tell you from experience that this simply isn't the case. Writing an employee handbook is not a "one-and-done" process, as many payroll companies would have you believe. Rather, it requires lots of individualized, ongoing attention, the ultimate goal of which is to create a living document that will naturally evolve over time as your business and the laws that govern it change.

If done correctly, your handbook will include policies and information pertinent to your unique business and no one else's. A quality employee handbook will also build legal protections for your business in a way that is compliant with your federal, state, and local laws.

GRAPPLING WITH EMPLOYMENT LAWS

The way that employment laws govern things like Paid Time Off (PTO), the treatment of individuals in protected classes (as well as what qualifies as a "protected class"), leave for things like pregnancy, medical issues, and disability, how overtime is calculated and paid, separation procedures, required policy notifications, gossiping, certain types of required training, and more will depend on where your business is located at the city, county, and state level, what industry you are in, how many people you employ, and other factors.

Further, employment laws are changing all the time. **CEDR's compliance department noted more than 100 changes to employment laws over the course of 2019**, and your handbook policies need to be regularly updated to reflect those changes.

Finally, borrowing your handbook from another business or using a cookie cutter template means you have to be the employment law expert. It can also mean failing to outline your business' unique culture, including information such as your company's overall purpose, it's mission, and it's unique set of core values.

And, since every employee you bring on board should be <u>reading your handbook in its entirety</u> on their first day of work, your handbook presents a perfect opportunity to explain to each and every new employee what your company stands for and what is expected of them when they join your team. It is also very important that every employee acknowledges your policies by signing your handbook.



CEDR Members are updated whenever laws change that might affect their handbook's level of compliance.

Not a member yet and wondering if your employee handbook is current and compliant with all relevant laws? <u>Let a CEDR</u> employment law expert review it for free!



It's never too early to start learning, reading, and thinking about the shape you want your company culture to take. But I really think that it helps to have experienced some success and failures—and to have solved some other problems for your business—before engaging in the process of trying to put it on paper. It's hard to drop yourself into a new community and say "this is the difference I'm going to make" right off the bat, and that knowledge will certainly come with time and experience.

- Paul Edwards, CEDR CEO and Co-founder

USING YOUR EMPLOYEE HANDBOOK AS A CULTURE-BUILDING TOOL

Before getting into the elements of your handbook that specifically describe your company culture, it's important that we go over some basics.

For starters, answer these questions for yourself:

- Do you know where your employee handbook is?
- Can you be certain that it is in full legal compliance with all relevant laws and that it reflects how you run your business now?
- Has every employee at your business read your handbook?
- Have they signed it to acknowledge that they understand the content inside?
- Do they each have access to their own copy for ease of reference?

If you answered ,"No," or "I don't know," to any of the questions above, your employee handbook isn't doing your business any good. And, if it's just stuck somewhere up on a shelf gathering dust, then it's providing no cultural guidance to your team.

No matter how well-written it is, if nobody in your business is reading or referring to your employee handbook, it may as well not exist.

No matter how well-written it is, if nobody in your business is reading or referring to your employee handbook, it may as well not exist. And if you can't prove that your employees have read your handbook and are aware of how the policies inside apply to them, it's not doing anything to provide legal protections for your business.

Worse yet—if your handbook is out of date or out of compliance with any employment laws, it's probably leaving your practice exposed to potential litigation.



CEDR Solution Center Members, please take note:

Your CEDR handbook is updated for you when employment laws change that pertain to your business. It is important to keep CEDR informed if your total number of employee's changes so we can keep your handbook policies as current as possible.

Without going too deep on the subject (<u>you can read our complete Employee Handbook Guide here</u>), you can reference the four-step checklist below to ensure that you are getting the most out of your employee handbook:

1

Make it part of the onboarding process.

Have each and every new employee read your handbook from cover to cover on their first day of work. Not only will this be a great introduction to your company culture and employee expectations, but it will also make it difficult for employees to ever claim ignorance if they fail to live up to your expectations or follow your policies.

2

Have all employees sign your handbook.

When written properly, many policies will protect you as the employer as much as the laws automatically protect your employees. The difference is that your protection is not automatic—you actually have to distribute those policies and have them signed. A signature on your handbook can serve as legal evidence that an employee read and understood your policies from day one. We recommend streamlining this process with CEDR's HR Vault, which allows you to distribute and collect digital signatures easily.

(3)

Make sure all employees have access to a copy.

Make it easy for employees to refer to your handbook to answer their own policy questions (we call this "employee self-service"). This will save you time and frustration answering the same questions over and over again, and will make it easy for employees to teach themselves the protocol for addressing any number of situations that might arise at your business (it's also another convenience associated with using CEDR's HR Vault).



Update your handbook regularly.

To ensure that your handbook stays compliant with employment laws as they change, and that it reflects the way you run your business as it grows and changes, we recommend updating your handbook at least once a year. Have employees read and sign the updated version each time changes are made (our HR experts reach out to CEDR Members whenever changing laws might necessitate a handbook update).

Now that you have an idea about how to best use your handbook, let's talk about what goes inside from a company-culture perspective.

LAY IT OUT CLEARLY

If you don't take the time to develop your company culture strategically, your employees and customers are going to define it on their own. And experience tells us that you may not like what they come up with.

By laying out elements of your company culture as you intend them and communicating them to your employees up front, you can set your entire team up—along with your customers, patients, and/or clients—on the same page from the start and stop the counterculture builders before they begin.

Clearly defining parts of your company culture in a professionally written handbook first, and then incorporating your handbook as part of your onboarding process, allows you to demonstrate to new employees that you have your, ahem, "stuff" together from the outset.

This level of organization and structure instantly says to new hires, "We know who we are and have a set way of doing things and treating one another—here is your roadmap to success at this company." It also sends a message to new employees that they were hired because they appeared to be a cultural fit, and that they must seek to align themselves with your culture moving forward.

Communicating your culture should therefore be a part of your structured onboarding process.

Using a **Structured Onboarding Process** <u>significantly reduces</u> turnover and makes new hires 50 percent more productive.

<u>Download our free Hiring Guide</u> to get a helpful onboarding checklist you can use with every new hire.

GET THE GUIDE!



When you implement your onboarding process, company culture, and policies on the fly, you're telling your employees that structure and procedure aren't important enough for you to focus on as a business owner and/or manager. That, in turn, signals to your employees that they should pay little attention to respecting your culture. As you can imagine, this makes it very difficult to command respect later when trying to assert that your employees need to follow policies and procedures, themselves.

Elements of Company Culture

Your company's culture is built on three primary components that we like to call the *Three Pillars of Company Culture*. These are your company's **Core Values**, its **Purpose**, and its **Mission**.

Some business owners also like to include a fourth 'pillar' in the form of a "Vision Statement." At CEDR, however, we find that statements of Mission and Purpose are usually sufficient for most business owners to cover any additional benefit that might be provided by a specifically stated Vision. Some businesses even create hybrid statements that combine their Mission with their Vision and/or Purpose.

In short, when it comes to parsing the many voices that have chimed in on this subject over the years, there's a lot of gray area to navigate. But the vast majority of small-to-medium-sized business owners and managers can rest easy knowing that **your Purpose and Mission will likely do enough of the necessary heavy lifting on their own without additional support from a Statement of Vision**.

Creating your company's Core Values, Purpose, and Mission is most effective when thought of as an internal process—it's not marketing! Building your company culture is about defining real values and goals that provide direction for your team and help inform the decisions they make on behalf of your business on a daily basis.

That said, the creation of a company culture doesn't happen in a vacuum. When drafting or contemplating your Core Values, Purpose, and Mission, bring in the troops—involve your managers, your team members, and even your friends and family if that makes sense for you. More input is better when trying to create something that is meant to be as comprehensive and universal as this. Of course, final approval ultimately rests with the company's decision maker(s).

We'll go into a little bit of detail on each of the Three Pillars of Company Culture on the next page. Once you're ready to start drafting your own, check out the exercises at the end of this section.



Want to talk to other business owners and managers about creating a Company Culture? Join the discussion in our Facebook Group, HR Base Camp!



A codified company culture can be a unifying force when organizations are looking to break through obstacles to their growth and expansion. Culture can also help leadership maintain a connection to employees when a company grows too big for members of the leadership to build a personal relationship with each and every employee.

- Michele Bergan, CEDR HR Director

THE THREE PILLARS OF COMPANY CULTURE



Core Values:

These are the philosophical underpinnings of your business. Together, your Core Values create a statement of who you are, what you stand for, and how your business runs. They should be used to inform the creation of your Purpose and Mission.



Purpose:

This is the "why" behind the existence of your company—the fundamental reason for your organization's existence. It grows out of your Core Values and beliefs. Your task in articulating your Purpose is to put your finger on why the world wants your company to exist and what void you would leave if you folded up shop. Your Purpose is something you are always working toward, but can never fully attain.



Mission:

This is a statement of what your business does, for whom it exists, and where you intend for it to be in the near future. Unlike your Purpose, your Mission should be aspirational yet achievable. It has a clear finish line and a specific time frame. A 3-5 year time frame is ideal in larger organizations. If your team has less than 10 employees and your gross is around \$1 million or less, then you may want to set your Mission in one year increments.

CORE VALUES

When working to define your company culture, you will want to focus on drafting <u>your company's Core Values</u> first. Without your Core Values in place, it will be much more difficult to define your company's Purpose and Mission.

Your Core Values are the philosophical underpinnings of your business. They last forever and exist regardless of your business model or product offering. Together, your Core Values create a statement of who you are, what you stand for, and how your business runs.

Core Values say what is important to your company and what is unique about working there. They should be specific enough to be easily understood as guiding principles, but general enough to be held up against all communication, personal interactions, and work done by or on behalf of your business.

Words like "integrity," "honesty," "innovation," and "teamwork" are common in the Statement of Core Values that appears in many <u>professionally written employee handbooks</u>, including those composed by the HR experts at CEDR.

Generally speaking, business owners and managers have a lot of freedom when it comes to defining their core values, as well as how many they define. We recommend coming up with a handful—somewhere between 3 and 10, in total—in order to be thorough and still possible for employees to memorize them by repetition.

When codifying your Core Values, work with your leadership team to get the ball rolling and then get input from the rest of your organization in a team-wide, town-hall-style meeting. It can make implementation easier when your team feels like their voices were heard and they've had ownership in that process.

- Tiana Starke, CEDR Solution Center Advisor



EXAMPLES OF CORE VALUES



COCA COLA:

- Leadership: The courage to shape a better future
- Collaboration: Leverage collective genius
- Integrity: Be real
- Accountability: If it is to be, it's up to me
- Passion: Committed in heart and mind
- **Diversity:** As inclusive as our brands
- Quality: What we do, we do well



SOUTHWEST AIRLINES:

- Live the Southwest Way: Warrior Spirit, Servant's Heart, Fun-LUVing Attitude.
- Work the Southwest Way: Work Safety, Wow Our Customers, Keep Costs Low.



WHOLE FOODS:

- We Sell the Highest Quality Natural and Organic Foods
- We Satisfy and Delight Our Customers
- We Promote Team Member Growth and Happiness
- We Practice Win-Win Partnerships with Our Suppliers
- We Create Profits and Prosperity
- We Care About our Community and the Environment

PURPOSE

Your company's Purpose explains why your business exists. It outlines your company's unique selling proposition (i.e., what the world would be missing if you were to close up shop) and it does so in the space of a few short sentences

Your Purpose as a company should be written in a way that makes it timeless. You should always be working toward your overall Purpose, though it can never be fully attained. In order to make sure that it's always pointing your team in the right direction, your Purpose should be built on the scaffolding of your company's Core Values.

Since it is built on your company's Core Values, your Statement of Purpose should go beyond talking about the products and services your company offers by shining a light on your reason for getting into business in the first place.

Here's what we mean by that:

In a <u>2016 article for the Harvard Business Review</u>, Disney Institute Senior Cast Development Director Bruce Jones explains that, where a company's Mission "describes what business the company is in now and what business it plans to be in in the future," the company's common Purpose "goes beyond the Mission, acting as the unifying principle that drives everything the organization does."

Where a company's Mission explains the "what" behind a business' particular set of offerings, its Purpose goes a step further by serving up the "why."

To use the example of the Walt Disney Corporation, its Mission, in part, is "to be one of the world's leading producers and providers of entertainment and information." In contrast, University of Disneyland founder Van Arsdale France said in 1955 that the Purpose of Disneyland was simply "to create happiness for others."

So, where it might be the Mission of a dental office to "provide affordable, quality dental care to all (or a certain number of) patients and to attract 300 new patients next year," its Purpose might be something more like "Helping our patients to live better lives by improving their oral health and, therefore, their overall health," for example.

Your company's Purpose should serve as a rubric you can use to determine if the products, services, and communications offered and utilized by your business are aligned with your company's Core Values. To self-check whether a particular practice or procedure at your company meshes with those elements of your culture, ask yourself two questions:



Does this help us execute the "what" behind what it is we do as a business?



As it's handled today, does this support our greater reason for doing the type of work that we do?

Once you've got a solid grasp on what it is that you do as a business and why you do it (aside from being sustainably profitable, of course), it's time to start thinking about your goals.



Resist what will certainly be a strong urge to slip into "marketing speak" while forming your Statement of Purpose. While it's fine for your Purpose Statement to be seen by the public, it's purpose is not marketing! This is about establishing the reason why you exist.

You may find it helpful to think of the void it would leave if you ceased to do business tomorrow. If the hair doesn't stand up on your arm at some point, you don't have it right yet.

It's OK to establish a Purpose and realize it needs to be tweaked or improved at some point. It's even OK to change it altogether, if you are inspired to do so.

Once you establish your Purpose, you can use it to ask and answer all sorts of business-related questions. Should we expand our facilities? Should we grow our team to meet demand? Should we add more benefits and pay more? A well-defined Company Purpose can help inform almost any difficult business question that comes up for you.

- Paul Edwards, CEDR CEO and Co-founder

EXAMPLES OF COMPANY PURPOSE



KELLOGG COMPANY:

Nourishing families so they can flourish and thrive.



CVS HEALTH:

Helping people on their path to better health.



NIKE:

To unite the world through sport to create a healthy planet, active communities and an equal playing field for all.

MISSION

Your company's Mission is a statement of what your company does, who it's meant for, and where you intend for it to be several years down the road. Unlike your company's Statement of Purpose, your Mission is meant to be specific and achievable, if not to also make everyone a little uncomfortable in its ambition.

The general structure of your company's first Mission Statement might take the form of something like:

"(Company name) provides (product or service) to (customer demographic) in order to (insert short term goal)."

Having a clearly defined Mission tells your employees and managers what your business aims to achieve through its product and service offerings and its various methods of communication (e.g., with prospects, customers, partners, and general marketing efforts).

A succinct Mission Statement also helps to align the efforts of your team by ensuring that everyone employed by your business is working toward the same daily objectives in service of the same goals.

For larger organizations, a 3-5 year finishline for your overall goal is ideal when crafting a Mission Statement. If your team has less than ten employees and your gross is around \$1 million or less, then you may want to set your Mission in one-year increments.

Most importantly, your company's Mission also serves as a mechanism for enrolling and engaging with your employees as each year progresses. As your team travels along the path laid out by your Mission, every employee should be able to see the individual role that they play in that equation. If your Mission is working as intended, each person on your team will be able to explain how their day-to-day actions affect the business' ability to deliver on that Mission.

From the larger goal or goals outlined by your Mission, owners and managers can and should create specific tasks in service of those goals, and then assign accountability for those tasks to individual employees (more on this later).

When drafting a Mission statement for your company, think about where you would like your company to be and what you would like to see it achieve within the next few years. Do you want to help, provide for, or educate a certain number of people? Do you aim to gain a certain number of referrals from existing customers in that timeframe? Maybe you'd like to be seen as your community's foremost expert on your industry or specialty, or to improve your community in some specific way.

Consider this hypothetical Mission Statement for a new restorative dentist setting up shop in a small town with a population of about 4000 people:

By providing top-notch, people-focused restorative dental care to no less than 400 new patients over the next year, the community served by Creekside Dental will gain a new smile. Given the population of the community we serve, one in ten smiles you see at the post office or grocery store during the upcoming year will be a direct result of our services.

Essentially, your company's Mission Statement can be boiled down to these three simple questions:

- 1 Who are your customers?
- What benefits do you offer them directly and indirectly by providing them with the products and services you provide?
- If your business is nurtured properly and allowed to thrive, where should that put your company five years from now?

Write down whatever comes to mind and you'll be off to a good start.

Everybody has a specific role that they play in a company, but ultimately everything an employee does in that role should align with the company's values and should contribute to the company's mission.

Michelle Richard,
 CEDR Solution Center Advisor



EXAMPLES OF COMPANY MISSION

WARBY WARBY PARKER:

To offer designer eyewear at a revolutionary price, while leading the PARKER way for socially conscious businesses.



TESLA:

To accelerate the world's transition to sustainable energy.

AMAZON:



amazon To serve consumers through online and physical stores and focus on selection, price, and convenience.

VISION

As mentioned previously, at CEDR, we believe that the majority of the benefits provided by outlining your company culture will come from your company's Core Values, Purpose, and Mission Statements. Still, for those who are interested in taking things one step further, it might interest you to know what goes into crafting a Vision Statement for your business, as well.

In the words of CEDR CEO Paul Edwards, your company's Vision is its "Big, Hairy, Audacious Goal (BHAG)." Like your Company Purpose, your company's Vision is a statement of the impact you would like your business to have if it were nurtured and allowed to thrive indefinitely. Like your Purpose, this goal is meant to be so lofty that it can never be fully attained.

Your company's Vision is essentially an aspirational statement that demonstrates your company's potential to any interested parties (such as employees and shareholders). It's the summation of your company's ability to forecast the future of its business dealings in an ideal world, so feel free to dream big when crafting a Vision Statement.

Since most of the small-to-medium-sized business owners and managers that we serve at CEDR are content to limit the scope of their businesses to the communities in which they live and work, audacious Vision Statements don't really do much in the way of assisting with day-to-day operations. It's for this reason that we consider Vision Statements to be more relevant to larger businesses and conglomerates than to owners of the majority of private enterprises.

In a nutshell, your company's Vision statement can be boiled down to this one question: What level of influence or impact do you see your business achieving on the world at large when you daydream about its greatest potential several decades down the road?

EXAMPLES OF COMPANY VISION

alzheimer's \(\)\\ \ \ ALZHEIMER'S ASSOCIATION:

association A world without Alzheimer's disease.

LOREAL:

L'ORÉAL To provide the best in cosmetics innovation to women and men around the world with respect for their diversity.

AMAZON:



amazon To be Earth's most customer-centric company, where customers can find and discover anything they might want to buy online.



KNOWLEDGE IN ACTION: DEVELOP YOUR COMPANY CULTURE

Creating Your Company's Core Values

Establishing your company's Core Values will have an immediate effect on everyone on your team. Employees who are great get even better with clarity. Some will even be inspired when Core Values are implemented. Employees who fall below "the line," on the other hand, will quickly find themselves caught up in a process where unproductive behaviors are no longer acceptable and are much more difficult to justify.

Keep in mind that establishing your Core Values is about what you are—not about what you are not. Drafting Core Values should be a positive experience focusing on the values that motivate you and your team, and not a process of listing the negative values that you prefer to avoid as a company. Now, let's get down to drafting Core Values for your business...

Choose your Core Values:

Look over this list of Core Values and choose three that best represent what your company stands for (you might find more that speak to you and your team once you open up this process, but stick to three for this exercise):

Curiosity	Honesty	Order	Service
Dignity	Honor	Patience	Simplicity
Diligence	Норе	Peace	Stewardship
Diversity	Humility	Performance	Success
Education	Humor	Perseverance	Teamwork
Efficiency	Inclusion	Personal fulfillment	Technology
Environment	Independence	Pride	Thoroughness
Equality	Initiative	Profit	Thrift
Ethics	Innovation	Recognition	Timeliness
Excellence	Integrity	Reliability	Trust
Fairness	Intelligence	Resourcefulness	Truth
Family	Intuition	Respect	Understanding
Financial stability	Joy	Responsibility	Uniqueness
Forgiveness	Kindness	Risk-taking	Usefulness
Fun	Knowledge	Safety	Vision
Generosity	Leadership	Security	Vulnerability
Giving back	Learning	Self-actualization	Well-being
Gratitude	Leisure	Self-discipline	Wisdom
Growth	Longevity	Selflessness	
Harmony	Loyalty	Self-respect	
Health	Openness	Serenity	
	Dignity Diligence Diversity Education Efficiency Environment Equality Ethics Excellence Fairness Family Financial stability Forgiveness Fun Generosity Giving back Gratitude Growth Harmony	Dignity Diligence Diversity Humility Education Humor Efficiency Environment Equality Ethics Ence Equality Fairness Intelligence Family Forgiveness Fun Generosity Gratitude Growth Honor Hope Humor Inclusion Inclusion Integrity Intelligence Integrity Fairness Intelligence Kindness Fun Knowledge Leadership Giving back Learning Gratitude Leisure Growth Longevity Harmony Loyalty	Dignity Honor Patience Diligence Hope Peace Diversity Humility Performance Education Humor Perseverance Efficiency Inclusion Personal fulfillment Environment Independence Pride Equality Initiative Profit Ethics Innovation Recognition Excellence Integrity Reliability Fairness Intelligence Resourcefulness Family Intuition Respect Financial stability Joy Responsibility Forgiveness Kindness Risk-taking Fun Knowledge Safety Generosity Leadership Security Giving back Learning Self-actualization Gratitude Leisure Self-discipline Growth Longevity Self-respect

List your Core Values here (you can copy and paste them from the list on the previous page):	
Value 1:	
Value 2:	
Value 3:	
Brainstorm about how your values apply to your employees and customers: For each of the values you chose, list as many ways that it can be applied within your business as you can think of. Consider how certain positions and departments within your business might apply these values differently, as well as the way that applying each value to customers, clients, and patients might differ from the way it applies to communications between team members.	
Value 1:	
Value 2:	
Value 3:	

Draft a value statement:

Write a single sentence for each value explaining how it should guide the actions and interactions of your business and its employees. Be specific enough to offer guidance for employee expectations, but general enough to apply to each and every person and potential situation at your company. Check your work by seeing how your statements hold up to each of the potential applications you came up with during the brainstorming task above:

Core Value 1:

Core Value 2:

Core Value 3:

And there you have it! Completing a rough draft of three Core Values may not be enough for you to call this project "done," but now you're off and running!

Refine what you have so far and repeat this process for any additional values you deem applicable to your company. Then, run your work by a few people you trust and you'll be well on your way to defining your company's Core Values and culture.

Remember: Keep your final list as short as possible to make sure that you're sticking to the values that are most important, and to ensure that they are easy to understand and remember.



Want to share your work and/or discuss company culture with other business owners and managers? Join CEDR's private Facebook discussion group, <u>HR Base Camp!</u>



KNOWLEDGE IN ACTION: DEVELOP YOUR COMPANY CULTURE

Communicating Your Purpose

Though your Core Values are probably not fully fleshed out yet, you can use the three that you drafted in the exercise above to start thinking about your company's Purpose (beyond simply "keeping the doors open").

Think about how the Core Values you've selected differentiate your business from your competitors, as well as how they might speak to you and your team. **Write one way that each Core Value makes your business unique:**

Core Value 1:
Core Value 2:
Core Value 3:
List your company's product and service offerings below. As you do so, think about how your chosen values apply to each product and service you offer.
Products and Services:
How Values Apply:

Now, think about the primary benefits your customers will enjoy as a result of using your product or service. Does it make them healthier? Help them save time? Reduce their stress levels? Taste delicious? Provide a few examples below:

With those benefits in mind, think of secondary benefits your customers will gain from using your product or service. For example, if your product saves people time, what will they have more time to do as a result of using it? Or, if your service makes your patients healthier, what does being healthier allow them to accomplish?

Make an effort to draw all of those items together in a sentence that describes the reason your company is in business (the "why"). Fill in the blanks and you'll have a rough idea of the shape your final Statement of Purpose might take. We'll call this your "Skeleton Statement of Purpose".

"(Your Company Name) provides (list of primary products and services) to help customers (primary benefits) so that they can (secondary benefits)."

Your final, official Statement of Purpose will likely lean on the "secondary benefits" of using your products or services and need not contain your actual company name, lists of products and services, or even primary benefits of using your products (though this structure may come in handy when you sit down to work on your Mission Statement—hint, hint). Still, this exercise can help you develop a framework for what it is you're ultimately hoping to get across with your Statement of Purpose.

Workshop this sentence with the troops (managers, employees, family, friends) to create a cleaner, more concise, and more inspiring version.



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KNOWLEDGE IN ACTION: DEVELOP YOUR COMPANY CULTURE

Your Mission, Should You Choose to Accept It...

Now that you've spent some time crafting your company's Core Values and Purpose (essentially, the "how"
and "why" behind your company's existence), it's a good time to consider where you intend to take things
in the short term. We're talking about drafting your company's Mission in this section (the "what" behind
your company goals).

Start with the Skeleton Statement of Purpose you created in the previous exercise and write it out here:

"(Your Company Name) provides (list of primary products and services) to help customers (primary benefits) so that they can (secondary benefits)."

Now, choose a timeframe for your goal—somewhere between one and ten years from today. The smaller your company is, the shorter your timeline should be (if you have revenue of less than \$1 million and/or less than 10 employees, stick to one-year intervals). Enter your timeframe in years below:

Next, think about how big you'd like your company to get in company goals:

and write down your

Will you remain the sole decision maker for your business, or would you plan to add partners and/or shareholders down the line?

How many locations will you have?

What sort of revenue do you hope to be taking in per year?	
What portion of that revenue would be profit?	
About how many customers would you need to serve in order to meet your revenue goal?	
How big will your <i>community</i> be in ? In other words, how far would you like impact of your business to spread (regionally, statewide, nationwide, international, a specific number of customers, etc.)?	
Using the information provided above, write a single sentence outlining your most important one or two priorities in terms of business growth using the following prompt: "In , our business aims to"	VO

Combine your Skeleton Statement of Purpose with the short term goal or goals listed above and incorporate your core values into that statement. Follow the template provided.

Here are the Core Values you chose:

Use these values along with the Skeleton Statement of Purpose at the beginning of this exercise to create a rough mission statement.

"(Your Company Name) provides (list of primary products and services) with a focus on (Core Value 1, Core Value 2) and (Core Value 3) in order to help customers (primary benefits) so that they can (secondary benefits). In , our business aims to (short term goal)."

The Mission Statement drafted above is obviously extremely rough, but it contains all of the necessary elements of the finished product, if not a little bit extra. Now it's just a matter of revising until you get it right. Consider eliminating your primary benefits from the statement, refining or revising your list of offerings, or rephrasing/eliminating direct mentions of your Core Values.

For example, in your short-term goal, rather than a phrase like "Serve 600 new patients...," consider the phrase, "Help 600 people (achieve a primary or secondary benefit from your product or service)." Use the space below to make some notes on how you can improve your Mission Statement.

Now, write a revised Mission Statement here:

Finally—you guessed it—bring in the troops and work together until you get it right! It will likely take several lunch meetings (or more) to get to a place that you can all agree on but you'll be glad you did the groundwork once it's done.



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How Company Culture Helps You Manage

The point of working to establish your company culture in print is not to simply fill a few pages of your employee handbook with abstractions and flowery words. If done properly, that content will allow you to implement cultural systems that guide your employees on what is expected of them throughout the course of their employment and, as a result, will help make managing easier.

Your <u>Core Values</u>, for instance, can help you have tough conversations with employees when they fail to live up to those values. If you have a Core Value of "Respecting each others' time," for example, this allows you to address issues of tardiness or absenteeism through the lens of that Core Value.

Similarly, your company Purpose can help you to refine policies, procedures, and company offerings in ways that are more supportive of your Core Values.

Consider the fictional dental practice mentioned on page 15, whose "Purpose" was "Helping our patients to live better lives by improving their oral health and, therefore, their overall health." Based on that statement, such a practice could retool patient offerings to focus more on overall health by partnering with a local gym to offer patients a free week of membership, or by creating or recommending materials that explain the connection between oral health and general health and wellness.

With respect to your company's goals for the future, think of it as a job description for your business, where having a set of goals in mind can help you shape the workings of your company in service of achieving that goal. After all, the first steps in any great mission are to write down your objectives and break them into measurable, achievable parts known as "projects" and "tasks."

GOALS, PROJECTS, AND TASKS

Once you have a clear framework for your company's culture in place, you can begin moving deliberately in the direction of your goals.

With your short-term goal in mind, it becomes much easier to visualize and actualize the smaller steps of the overall Mission that you'll need to take in order to get your business where you want it to be.

Perhaps you have yet to open your doors—or you are open but feel you need to up your game—and you ultimately aim to serve one-thousand people in your community. Your first (and, notably, much smaller) goal may be to get twenty new patients through your doors during the first week of your efforts, and a secondary goal might be to get two of those twenty to refer one more patient each.

In order for your goals to one day serve your company's purpose and vision, you'll need to break each goal along the way into projects, then divide those projects into the tasks necessary to complete each one.

In order for your goals to one day serve your company's purpose and vision, you'll need to break each goal along the way into projects, then divide those projects into the tasks necessary to complete each one.

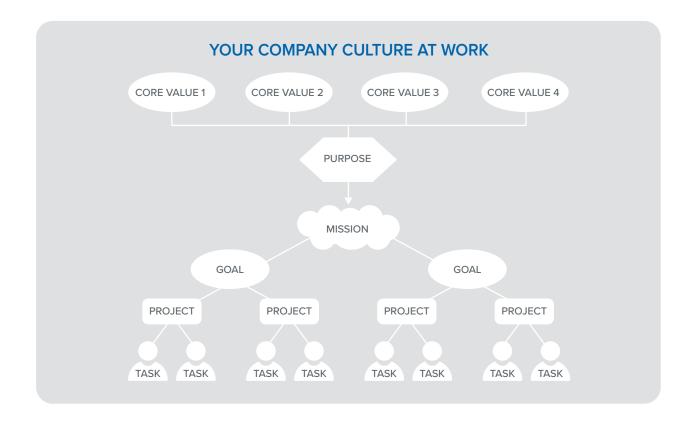
In order to achieve the goal of getting your first patient, you'll probably realize that you first need to "Spread the Word." You know that there are a number of ways to do that, so you pick a few of your favorites: let all your friends and family know you are opening, advertise online, and get active on social media, for instance. Now you've got your first three projects.

Let's focus on just one of those projects—say, getting active on social media. What tasks need to be accomplished for that project to be completed? First, you might want to come up with an offer to attract first-time patients. Then, you'll need to build a Facebook page (if you haven't already), design targeted ads for Facebook, and learn how to run and monitor ads on your Facebook page.

Assign the project and each task within it to the right people in your organization and you'll be well on your way to completing that first project and accomplishing your first goal.

An important point to remember: The key to making sure your tasks and projects are being completed and done well is to assign them to the right people and ensure that those individuals remain accountable for their portion of the project or projects.

Without those key elements it will be incredibly difficult to get anything done at the ground level, let alone achieving the goal outlined in your company's Mission.





KNOWLEDGE IN ACTION: GOALS, PROJECTS, AND TASKS

In order to turn your goals into reality, you'll need to break them into digestible chunks.

Look at the goals you provided in the questionnaire section of the 'Mission' exercise on page 25. Choose one and write down the first step you will need to take to achieve that goal (think of this as a mini-goal)?

What are the component steps necessary to achieve that mini-goal? Think "Step 1", "Step 2", "Step 3"

Looking at Step 1 from those listed above, what projects would need to be completed in order to accomplish that step and who among your current employees would you assign to manage those?

Project 1: Assignee:

Project 2: Assignee:

Project 3: Assignee:

Now, choose one project from those above that seems most accomplishable to you now and break it into achievable tasks. Who would you assign to each task?

Project:

Task 1: Assignee:

Task 2: Assignee:

Task 3: Assignee:

Feeling a little bit closer to your goal? Or perhaps you're starting to wonder if your employees are capable of handling the jobs you assign to them (we've got a <u>tool to help with that</u>, too!). Either way, just completing the exercise should help you to understand how to turn your Mission into a reality, one small step at a time.



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YOUR COMPANY POLICIES (HOW YOU OPERATE IS COMPANY CULTURE, TOO)

In addition to laying out elements of your company culture outright in your employee handbook, the policies you include in that book will communicate your company culture, as well. And if those policies seem contrary to the culture you've taken care to outline deliberately, you can bet that your employees will be skeptical of your commitment to the Core Values you selected, to put it mildly.

To ensure that your company culture is providing you with all of the benefits outlined in this resource, let your Core Values, Purpose, and Mission serve as a guiding light for everything else you do at your business.

The people that work with and for you are at the heart of everything you do as a company. In fact, some days you will spend more time with your work team than with your own family members!

The good news is that, as a business owner and manager, you get to choose who you work with. As a matter of fact, so do your employees, and we've found that creating and implementing Core Values can have a profound impact on the decisions you make about who you will work with going forward.

Thus far, we've talked about strategic HR planning in the context of creating a foundation of company culture on which a group of employees can transform itself into a high-performing team. A side benefit of the process we described is that it will help you as a manager to identify the types of people who will help you achieve your goals. Inevitably, some people will not fit your culture. Just as likely, some will leave, and you may even have to let a few go.

Resist the temptation to go to your employee handbook and start making changes on your own. One change in your book about "gossipping" could cost you tens-of-thousands of dollars. That same change using specific, legally compliant words and phrases, on the other hand, would completely protect and support you and your business.

As you know, one of the most difficult things you have to do as a manager of people is to hold them to a standard. What you may not always realize is that adhering to that standard is also one of the riskiest activities for you because it can lead to you having to fire the people who refuse to adhere to and promote your Core Values.

Firing people is risky because <u>you don't do it in a vacuum</u>. There are hundreds, if not thousands, of laws and protections in place for your employees. We would be remiss as experts in compliance and employment law if we did not point out that <u>your handbook policies</u> can and should be designed well enough that you are empowered to fire whomever you need to.

If you have cobbled your book together from various third-party sources or have been given one as a "perk" by a payroll company, you may want to make sure that there is nothing in that handbook that could do harm and that it has all of the protections afforded to you by a professionally written book.



If you aren't a CEDR Member and haven't done so already, <u>reach out to us</u> as part of this exercise and ask for a free evaluation of your policies.





As an employee, being good at your job is only half of the equation. The other half relates to your citizenship. Your company culture serves as societal rules that everyone at your company has agreed to live and work by, which helps both individual employees and organizations as a whole to self-check whenever they feel like they might be stepping outside of those agreed bounds.

- Michele Bergan, CEDR HR Director

NON-MONETARY BENEFITS

Your benefits package will certainly be something that your best employees (which we call difference makers) are interested in. Get these right and you can attract and keep top-notch people on board. This includes the traditional benefits like health insurance, paid vacation, bonuses, and other things that tend to come to mind when that particular b-word is mentioned. But your offerings can also include other less tangible items that might not be as easily measured in dollars and cents.

Non-monetary benefits are the cultural benefits of working for your company. We have a dog-friendly office policy at CEDR, for example, so well-behaved dogs are allowed to come to work with their owners. And though having your dog with you at work may not be something you can account for as financial remuneration, it's a benefit that the vast majority of our employees (dog owners and advocates, alike) see as a real benefit of working for the company. And if you guessed there is a policy in our handbook about well behaved dogs, leashes, and picking up poop, you would be correct!

We have one member practice that employs a number of working moms. That business owner provides tuition for a two-week summer day camp for all of the kids of their employees. Of course, that has a cost, but this is a case in which a business identified a specific benefit that their team would value above all else.

Though our friends in the healthcare and dental industries can't allow dogs at the office, there are other ways to provide non-monetary benefits to your employees. These can include things like paying for and cleaning uniforms, offering a four-day workweek, providing training and professional education stipends, Uber or Lyft accounts, weekly or monthly lunches, complimentary gym access, car washes, and more.

Whether or not you've thought of them as such, there's a good chance that your business is already providing some additional non-monetary benefits to its employees. Does your office manager bring donuts every Friday? Do you have regular holiday parties or go on frequent outings as a group? Consider listing these things as non-monetary benefits in your next job ad.

One final note on non-monetary benefits and policies: It's important to work with an experienced HR professional when writing policies for your employee handbook or looking for ways to provide additional benefits to your employees, whether they are traditional or cultural benefits.

A number of laws govern how certain financial incentives or gifts must be paid out and/or taxed, and many state and local laws (such as those concerned with protected hairstyles) can affect what you can and cannot allow in policies which might seem to be trivial or subjective at first glance.

HIRING A TEAM OF ENTHUSIASTS (AND CULTURAL ADDITIONS)

Here at CEDR, we call individuals that bring a new set of skills, knowledge, or energy to a team "difference makers." Difference makers are the employees that are passionate about what they do. And, as a result of caring about the work that they produce, difference makers do great work.

The fact that you are reading this book (and that you've made it this far in) indicates that you are a difference maker. Now, the trick is to build a team of people with that same drive, passion, and commitment to work alongside you.

The fact that you are reading this book (and that you've made it this far in) indicates that you are a difference maker. Now, the trick is to build a team of people with that same drive, passion, and commitment to work alongside you.

When your company culture is woven into the fabric of your business, everything you put out into the world —from your website and promotional giveaways to prospect emails and even your office decor—will be a reflection of your company culture. And that culture alone may prove to be enough to attract people who are cultural fits to apply, either by word of mouth or otherwise.

Having a solid grasp on your company culture also allows you to leverage that culture in your job ads and your hiring process. Some of your top candidates will be drawn to your company because of the culture it projects and, when you have a team of difference makers, they too will help you find other amazing people to bring on board.

If an applicant is attracted to your business as a result of your company culture, when asked why they applied to a position at your office, candidates will say things like "It just seemed like a fun place to work," or "I was really excited by (non-monetary benefit) in your job ad." (We get this one a lot: "I don't have a dog but I noticed you allow dogs at work and that seems pretty cool.")

Familiarity with your company culture—knowing who will 'fit' with that culture, as well as who is likely to 'add' to it—can also help you choose between multiple well-qualified candidates. When two or more candidates seem equally qualified from a technical perspective, the one who seems to personally jibe more with your Core Values, Purpose, and Mission is likely to be the better addition to your team.



After solidifying elements of your company culture, you'll want to revisit them throughout the life of your business. Not only will this information factor into day-to-day dealings with current employees, but it will also filter into the way you recruit new team members moving forward.

- Tiana Starke, CEDR Solution Center Advisor

HAPPY EMPLOYEES DON'T QUIT

When you hire employees based on cultural fit, you are also taking steps to reduce office turnover. Employees who are attracted to your company and stay because of the culture are less likely to walk away from a position at your company over a couple of dollars an hour.

Nurturing those employees by showing them where they fit and how what they do helps your company to achieve its goals is an experience they are not likely to have at other businesses. Giving and asking for regular feedback and listening to what they have to say can go a long way towards maintaining your culture and solving problems. And, when employees know that you are listening to what they have to say, they feel like their contribution to your company is seen as valuable, and that feeling actually carries more weight than actual financial gain in most cases.

Hiring for cultural fit (and/or addition) can help you ensure that you are able to keep your employees happy in their jobs, and keeping employees happy is a sure-fire way to reduce turnover and increase revenue for your business.



Conclusion

Company culture is more than a buzzword, and it is not just for big companies, either. It's the personality of your company (and every company), and it's defined by the feeling that your employees and customers get when your business comes up in conversation, for better or worse.

If you are waiting for the "right moment" to start thinking about your company culture, that moment is now. In fact, if you haven't done so already, someone else has probably started that process without you, and you can bet that whatever they've come up with on their own is going to be markedly different than what you would create yourself. If your team is unengaged, gossipy, focused on themselves, and seem to always be waiting for you to solve every problem, then that is the culture of your business, but it does not have to be that way!

By putting work into crafting your company culture deliberately, you're setting the stage for your employees, your managers, and your business to succeed from the start. Skip that work and the resulting lack of structure will be constantly nipping at your bottom line.

It's never too late—or too early—to start putting in the groundwork for your Strategic HR and Team Management Planning. And the sooner you start taking steps in that direction, the sooner you can start enjoying the benefits of a happier, more cohesive team and a more successful business.

CEDR HR Solutions' Company Culture



CEDR CORE VALUES

- Integrity. We do what we say we're going to do when we say we're going to do it. When we know we won't be able to do it, we take accountability and re-promise.
- Clarity. We are clear in our communications to our members and to each other.
- Value. We deliver our value in the way we would want value delivered to us.
- Innovation. We use innovation to find efficiency without compromising quality.
- Respect. We respect our members by suspending judgment and meeting them "where they are at."
- **Growth.** We grow from failure. We are a safe place to learn from our mistakes.
- Model Workplace. We are a model of the great workplace we help our members achieve.
- Current. We are current on the guidance we are giving.
- Strategic. We are strategic in who we work with.
- Profitable. We are financially sustainable and profitable.



CEDR PURPOSE

Simplifying Human Resources through innovative solutions which empower businesses to build great teams. Because great teams make great businesses, and better workplaces make better lives.



CEDR MISSION

CEDR provides the nation's best Employee Handbooks and HR Support to independent healthcare employers across the country. Through our dynamic workplace, unique business model, consistent systems, interactive member training, and powerful strategic partner and affiliate programs, we continue to increase the lifetime value of all members. As a result, we attract world class talent, increase profitability and are the dominate Remote HR Support company in healthcare.

Watch for these forthcoming titles in the CEDR Manager's Playbook Series:

Giving Feedback and Coaching Your Employees

Building Systems and Procedures that Work for Your Team

OTHER TITLES FROM CEDR HR SOLUTIONS:

CEDR Hiring Guide: Finding and Attracting Difference Makers to Your Practice

Making Working Interviews Work

The CEDR Guide to Employee Classification and Wage Compliance

The CEDR Guide to Employee Handbooks

The CEDR Guide to Employer Health Benefit Options



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