Index

A
ABCDE. See Assume Blame Complain Defend Excuse
Accenture, research, 42, 115
Accountability, building, 84
Account-based marketing, 121
Achieving the Execution Edge (Bart/Schreiber), 153
Adopters, impact, 139
Advantages
  divisions, impact, 96
  Inc. ranking, 67
  origin story, example, 26f
  shortlist, 70–71
  Three Keys, 114
  values, display 23f
  work, desire, 67
Agility, importance, 111
Aguirre, DeAnne, 45
AKQA, iCrossing (merger), 161–162
Aligned customers, attraction/retention, 34
Alignment
  time, usage, 150–151
  understanding, 162
  vendor/supplier alignment, 179
Altman, Ian, 84
Angelou, Maya, 25
Apple, product line differentiation, 185–186
“Aspire Higher,” 44
Assume Blame Complain Defend Excuse (ABCDE) rule, 59–60
Audience, attraction, 111
Authoritative leadership, impact, 54–55
B
B2B buyers, industry content, 120
B2B companies, blog/traffic, 120
Bad hire
  cost, 76–77
  occurrence, 77–78
Barr, Stacey, 167
Bart, Chris, 153, 155
Beer, Michael, 166
Behavior
  direction, actionable statements (impact), 21
  impact, 61
Beliefs, connection, 152
“Best available athlete” alignment, 81
  concept, popularization, 68–69
  “Black box,” 83
BlackRock, position, 115
Board of directors, language (speaking), 126
Bossidy, Lawrence, 175
Bottleneck, 103, 107
Bottom line, hiring (connection), 76–80
Boundaries, establishment, 34–35
Brand
  positive contribution, 34
  reinforcement, digital footprint (usage), 29
  reputation, importance, 25
Brand foundation, 1, 155
  creation, Three Keys (usage), 186
  keys, 189
  seriousness, 175
  strategic implementation, 18
  understanding, 16–17
Brand, keys
  application, 27–28
  creation, 15
  infusing, 29
  purpose, 18–21
  story, 25–26
  understanding, 18
  vision/mission, 20–21
  why, 19
Brand-KPIs, 172, 179, 183
Bring Passion (Investis Digital value logo), 10f
Bungee cord, umbilical cord
  (contrast), 134
Bureaucracy, impact, 107
Burnout, attention, 39
Business, 3–5
  brand keys, application, 27–28
  card, rethinking, 29
  leaders, recognition, 151
  marketing, relationship, 109–110
  objectives, focus, 157
  purpose, 190
  exhibition, contribution, 184
  requirements, 68–69
  risk, 146
  unit, traction (problems), 103
Business Case for Purpose, This (Harvard Business Review Analytics Services), 13, 19
Butterfly, 78–79

C
  Capital One, 72
  Carvajal, Dave, 72
  Chapman, Courtney, 31
Chief Executive Officer (CEO)
  bottleneck, 103
  commitment, requirement, 39
  gravitas, 50
  hiring involvement, 71–72
  language, speaking, 126
Chief Marketing Officer (CMO), role
  change, 124–126
  identification, 126–127
Clients
  attraction, 147
  client/customer feedback survey, 178f
  conversation, 147
  dependence, 58
  emotional connections, building, 147
  financial trouble/outcomes, 116–117
  gratification, 147
  importance, 129
  involvement, 127
  needs
    learning, 141–146
    understanding, 147
  personal relationship, building, 145
  problem
    solving, 141–147
    understanding, 135–136
  purchase process/reasons, 139–141
  retention/referrals, 177–179
  satisfaction, purpose (impact), 176
  time, spending, 132
  trust, 140
Client SuperPleasing, 131–132
Commonality, impact, 135
Communications, 109
  changes, 138f
  consistency, 143–144
  honesty, importance, 27
  impact, 107
  plan, creation, 156
building blocks, 33–41
building, communication (usage), 37–38
building, tactical strategies, 39
communication, 33, 37–39
consciousness, 157
consistency culture (reinforcement), directive leadership (impact), 54
defining, 30
evolving, 42
fit, ensuring, 71–72
importance, 32
innovation, 42
innovation culture (creation), participative leadership (usage), 54
inspiration culture, transformational leadership (impact), 53–54
interconnection, development, 46
keys, 45–46
norms, evolvement, 32–33
ownership, leadership (impact), 33–36
pervasiveness, 33, 36
purpose/performance, relationship, 171
transfer, 154
unification, 34
values, 67–68
values-based culture, 31
YES! culture, creation, 43–44
Customer satisfaction, 113, 176–177
dashboard, 180f

D
Data
analysis, 168
collection, 168
demographic data, usage, 124
Investis Digital usage, 123–124
leverage, 124
opportunity/overload, 123–124
organic data, 169–170
real-time data, exploration, 124
savviness, 127
Davepartners.com, 72

da Vinci, Leonardo, 24

Deals
execution, 152–157
making, 163

Deal team/workstreams, integration
management office (connection), 157

Decision-making filters/tools, 21

Demographic data, usage, 124

Department divides, breakdown, 46

Digital footprint, usage, 29

Directive leadership, impact, 54

Direct-mail piece, requirement, 12

Direct stakeholder alignment, equation,
165, 167, 186

Discounting, handling, 84, 85

Disruptive technology, change, 52

Divisional organizational structure, 93,
98–99, 98f

“Don’s Download,” 38

Drucker, Peter, 50, 165

Due diligence, 159

E

Earnouts, 160–161

Embrace Clarity (Investis Digital), 9, 24
value logo, 10f

“Embrace Diversity,” 116

Emotional connections, building, 147

Employees
burnout, attention, 39
butterfly, 78–79
culture
dashboard, 174f
feedback survey, 173f
curiosity, 78–79
development process, 175
former employees, hiring, 75
growth (support), investments
(usage), 79
performance, reward, 39
perks, investment, 39

personal/professional development,
focus, 61
relationships, cultivation, 39
satisfaction, 170
ties, maintenance, 88
time off, 86

Empowerment, 46

Energy, direction, 157

Equality, culture, 42

Experience, 2–3
creation, 127
expertise, contrast, 139

External measurements, 172

External stakeholders, 56

F

Fairbank, Richard, 72

Feedback, 164

360-degree feedback loop, 15–16
client/customer feedback
survey, 178f

Firing, speed, 77

Firms
customers, expertise, 126
employees, loss, 158
interest, 140
organizational structure, 101–102
personality, display, 113
purpose, Three Keys (alignment), 129–130
values
echo, 114
infusion/maintenance, 104–105

Fletcher, Doug, 140

Former employees, hiring, 75

Functional authority organizational
structure, 93–95, 95f

Funnel. See Marketing; Sales funnel

Future, embracing, 152–157
Future leaders, identification, 50

G

Garofano, Christina, 163

Geneen, Harold, 91
Gig economy, 31–32
Goals, determination/achievement, 34
“Going native,” avoidance, 146
Governance, control, 157
Greenleaf, Robert, 51
Growth
hacking, 122
stimulation, communications (impact), 107

H
Heckelman, Wendy L., 163
Herzog, Jeff, 159–160
Hiring
bad hire
cost, 76–77
occurrence, 77–78
bottom line, connection, 76–80
Chief Executive Officer (CEO)
involvement, 71–72
cost, understanding, 72
investment, 76
practices, change, 65
process
change, 65–67
investment, 69–70
purpose, relationship, 175
slowness, 77
succession planning, impact, 81–83
time, excess (problems), 72
Honesty, impact, 117
How Clients Buy (Fletcher/McMakin), 140
How to Market a Professional Services Firm (Maisel), 132
Hsieh, Tony, 76–77
HubSpot, research, 119–120

I
iCrossing
AKQA, merger, 161–162
employees, meeting, 159
Identity, positive contribution, 34
Images, positive contribution, 34
Inbound marketing, 111–112
outbound marketing, contrast, 119
Individual (defining), core values (impact), 56
Information flows, 106
Innovation (encouragement), collaboration (usage), 61
Innovation culture (creation), participative leadership (usage), 54
Insight selling, solution selling (contrast), 142–143
Inspiration culture, transformational leadership (impact), 53–54
Inspire Greatness (Investis Digital value logo), 11f
Integration, details (importance), 163
Integration management office, deal team/workstreams (connection), 157
Internal conversations, impact, 133
Internal measurements, 171–172
Internal stakeholders, 56
Interviewing
keys, 72–75
purpose/story, communication, 88
Investis Digital
challenge/opportunity, 130
data, usage, 123–124
global rebranding, 17
logo, 6f
design, 17
marketing, 112
millennials, relationship, 41
multigenerational culture, 42–43
origin story, 26–27
value, images, 10f, 11f
values, example, 24
ZOG Digital
acquisition, 5
merger, 26, 102, 150, 154–155
Investments
  prioritization, 131
  usage, 79
Investor Relations (IR), 3–4

J
Jab, Jab, Jab, Right Hook
  (Vaynerchuk), 109
Job candidate
  deterrence, 70–71
  qualities, 74
  work history, problems, 73
Job search, 66
JotForm, 72
“Just Because” factor, 145–146

K
Karkowsky, Judah, 43, 114
Katzenbach, Jon, 45
Key Purpose Indicators (KPIs)
  client/customer feedback survey, 178f
  customer satisfaction dashboard, 180f
  dashboards, 169, 183
  employee culture
    dashboard, 174f
    feedback survey, 173f
  external measurements, 172
  goals, writing/progression, 184
  importance, 177
  internal measurement, 170–171
  key partner dashboard, 182f
  ownership, identification, 167–168
  partner/vendor feedback survey, 181f
Keys. See Brand; Culture; Marketing;
  Three Keys
  usage, 88, 185
Krzyzewski, Mike, 78

L
Leaders
  behavior, 57
  consistency, 57–58
  defining, core values (impact), 56
  empowerment, 157
  facts/specs, 60
  hiring, 63
  purposefulness, 187
  self-awareness/reevaluation, 51
  type, identification, 53–55
  values, connections, 50
Leadership, 49
  authoritative leadership, usage, 54–55
  consistency, 57–58
  directive leadership, impact, 54
  evolution, 52
  identification, 50–51
  impacts, 106
  job candidate qualities, 74
  management, contrast, 51
  mindset, 52
  participative leadership, usage, 54
  performance, 87–88
  proactive succession planning, 80–81
  purpose, 55–56, 87–88
  qualities, interviewing, 74
  service leadership, impact, 54
  status, 51–53
  styles, impact/support, 53–55
  succession, planning, 80–83
  team operation, values (impact), 36
Lead generation (benefits), social media
  (usage), 120
Leduc, Bob, 34
Lies, impact, 116–117
Life
  accomplishment, 192
  impact, 192
Line organizational structure, 93–94,
  94f, 96–97, 97f
LinkedIn (company profile), values
  (incorporation), 88
Logos
  impact, 5–7
  process, difficulty, 7–11
  Long-range development, short-range
    pressure (impact), 103
  Long-term focus, sustaining, 82–83
Index

M
Maister, David, 1, 131
Management
  leadership, contrast, 51
  levels, barriers (removal), 97
Managers, procedures/time management, 51
Managing the Professional Service Firm (Maister), 1
Marketers, data leverage, 124
Marketing, 109–112
  account-based marketing, 121
  approach, 127–128
  business, relationship, 109–110
  differentiator, impact, 171
  Investis Digital, 112
  keys
    alignment, 127
    impact, 113–118
    occurrence, 127–128
    process, tactics, 118–122
    prospect funnel, 137–139
    ignoring, 138f
    purpose, impact, 115–116
    tactics, 120–121
Marketing, keys, 12–14
  creation, 15
Matrix organizational structure, 93, 100–101, 101f
May, Olivier, 150
McLeod, Earle, 132
McMakin, Tom, 140
Measurement
  external measurements, 172
  internal measurement, 170–171
  performance, relationship, 183
  process, determination, 168–182
Mergers and acquisitions (M&As), 149
  experiences, 161–162
  success, possibility, 162
  values/alignment, understanding, 162
  work, 158–160
Mergers, occurrence, 160–161
Messages
  humanizing, 157
  importance, 109
  projection, 138f
Millennials
  Investis Digital, relationship, 41
  job selectivity, 40–41
  workforce, responses, 40–41
Mission, 129–130
  brand key element, 20–21
  accomplishment, strategies, 22
  understanding, candidate demonstration, 74
Mistakes, fixing, 72
Mobile device, marketing interactions, 120–121
Money
  control, 140
  money-focused compensation plans, 84
Moore, Geoffrey, 137
Motivation, 61
Multigenerational culture (Investis Digital), 42–43
Munroe, Myles, 49
Murdoch, Rupert, 43–44
N
Narrative, creation, 127
Nelson, Tom, 149
Newsletter, release (example), 38
Noble Sales Purpose (NSP), 132–133
Non-partner incentive, 84–85
“No Surprises” rule, 143–144
O
Operational–KPI dashboards, 179, 183
Organic data, 169–170
Organization
  definition, shared values (impact), 56
  design, 92–101
  growth, absence, 65
  integration, 163
  purpose/values/story, sharing, 157
Three Keys, 80–81
values-based organizations, 22
Organizational arrangement, uniqueness, 100
Organizational chart examination, 108
usage, 105
Organizational culture strategic asset, 151
understanding/embodiment, 60
Organizational design/Three Keys, relationship (absence), 92, 106–107
Organizational structures, 93–101
change, timing, 103–104
consideration, 108
example, 102
flaws, 106
selection, 107–108
Organizational support, control, 140
Outbound marketing, 111–112
inbound marketing, contrast, 119–120

P
Page, Larry, 71
Participative leadership, usage, 54
Partner compensation, 86–87
partner/vendor feedback survey, 181f
People interest, 140
investment/growth, 78–80
investment, growth opportunity, 83
leadership, determination (investment), 83
products/services, adoption, 138f
strategic asset, 151
values, alignment, 67–69
Performance, 87–88
culture/purpose, relationship, 171
driving, 176
elevation, 175
measurement, relationship, 183

Personal relationship, building, 145
Post-close integration plans, 160
Power of Character in Leadership (Munroe), 49
Proactive succession planning, 80–81
Problem, understanding/validation, 135–136
Procedures, learning, 51
Products, adoption, 138f
Professional services, purchase (steps), 140
Profitability, 166, 183
increase, equation, 165, 167, 186
Profit, idea, 163
Project organizational structure, 93, 99–100, 99f
Prompted feedback, 170
Purpose (key), 8, 51
alignment, 127, 132–137
brand key, 18–21
elements, 19
communication, 88
consideration, 29–30
culture/performance, relationship, 171
defining, 15–16, 157
finding, 190–194
hiring, relationship, 175
impact, 115–116, 176
measurement, 165
content, 168–169
data, analysis, 168
data, collection, 168
equation, 166, 167, 186
process, determination, 168–182
perspective, 170
priority, services (relationship), 130–132
purpose-based scoreboard, creation, 184
purpose-driven culture, 59
purpose-driven goals, impact, 184
purpose-led brand, creation, 113
purpose-led firm, journey (understanding), 127
review, 190
sharing, 157
writing, 193–194
“Purpose 2020” (Kantar Consulting), 117
Purposefully structure business, 91

R
Real-time data, exploration, 124
Rebranding, 5
Rebrand, need, 7
RecruitLoop, job candidate qualities, 74
“Red flags,” 143–144
Remote workers
challenges/involvement, 39–40
communication, open line (establishment/maintenance), 40
Reorganization, impact, 103–104
Repeats, recognition, 191–193
Request for proposal (RFP) problems, 136–137
Responsibility, absorption, 78–79
Rewards/incentives, noncash forms, 86
Risk, 16
reduction, 101–102
“Road blocks,” 143–144
Rogers, Kenny, 163
Role, clarity (absence), 103

S
Sales
funnel, 137–139
ignoring, 138f
insight selling, solution selling (contrast), 142–143
processes, 168–169
Schreiber, Elliot, 153, 155
Schultz, Howard, 63
Search engine optimization (SEO), 120
Self-awareness, importance, 57
Self-preservation, focus, 82
Senior-level hires, problems, 103
Servant Leadership (Greenleaf), 51
Service companies, mergers and acquisitions, 152
Service leadership, impact, 54
Service-profit chain, 55–56
Services, adoption, 138f
Shackleton, Ernest, 63–65, 70, 75
Shared culture, 56
Shared values, 22, 190
examples, 22–23
importance, 56
Shark Tank, 152
Shortlist, 70–71
Short-range pressure, impact, 103
Short-term goals, creation, 82–83
Sinek, Simon, 15
SMART. See Specific, Measurable, Attainable, Relevant, and Time-bound
Smart, Brad, 76
Social media, usage, 120, 121
Social sharing, usage, 127
Solution selling, insight selling (contrast), 142–143
Specific, Measurable, Attainable, Relevant, and Time-bound (SMART) goals, 183
“Split the Pie,” 84–85
Staff
authority organizational structure, 93–95, 95f, 96–97, 97f
coaching, 46
structures, 96
Staff organizational structure, 93
Stakeholder alignment, 166
Statements, making (conditions), 60
Story (key), 8, 51
brand key, 25–26
communication, 88
consideration, 29–30
review, 190
sharing, 157
story-sharing, 26
telling, 196–198
Strategic assets, 151
Strategic goals, 87
Strategic leadership, 186
Strategy, change, 103
Succession planning. See Leadership accountability/advocacy, establishment, 82
future, orientation, 82
impact, 81–83
long-term focus, sustaining, 82–83
short-term goals, creation, 82–83
usage, 80
value, 82
Succession processes, orientation, 82
SuperPleasing, 131–132
Tagline, usage, 29
Talent
development, organizational goal achievement (balance), 60–61
Talent, attraction/retention, 34
Tank, Aytekin, 72
Teams
building, communication (usage), 37–38
dependence, 58
knowledge/growth, 59–60
members, valuation, 59
productivity, acknowledgment, 184
Technical competencies, 22
Technology tools, usage, 70
Testimonials, usage, 127
Three Keys (purpose/values/story), 2, 7
development, 153
embracing, 13–14
focus, 41
guidance, 74, 155
impact, 25, 29–30, 88, 166
organizational design, relationship (absence), 92, 106–107
product, 141
reinforcement, 103
tools, 30
usage, 111–112
“Three-legged race,” 96
Time management, 51, 132, 150–151
Topgrading, hiring methods, 76
Transactions, importance, 152
Transformational leadership, impact, 53–54
Transparency, usage, 143, 145, 147
Trends, identification/usage, 124
Trust, 140
earning, transparency (usage), 143, 145
Umbilical cord, bungee cord (contrast), 134
Unger, Sheryl, 163
Values (key), 8, 51
accessible/understandable values, development, 196
activation, 195–196
alignment, 127
basis, 21
belief, 152
communication, 157
consideration, 29–30, 107
core values, 22, 56, 190
culture in action, 45
display, 23f
identification, 194–196
incorporation, 88
infusion, 104–105
naming, 194–195
people, alignment, 67–69
positive contribution, 34
results, contrast, 139
review, 190
shared values, 22–23, 56, 190
sharing, 157
Index

W
Walton, Sam, 129
Water bottle, consistency
example, 58–59

Weekly meetings, usage, 38
Weirens, Jeff, 150
Why
brand key element, 19
mindset, entry, 191
Wireless Generation, 443
Work
descriptions, 22
newspaper ad, response, 64f
respect, 140
Workflows, 101–102
Workforce, millennials (proportion), 32
Workplace, changes, 51–52

Y
YES! culture, creation, 43–44

Z
Zappos, 76–77
ZOG Digital, Investis Digital
acquisition, 5
merger, 26, 102, 150, 154–155