

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 differentia-
tion, 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
- impact, 119
- 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

- quality, 157
 - style, 28–29
 - transparency, usage, 147
 - verbal/nonverbal communication, 37
 - Community, building, 46
 - Company
 - content, buyer viewing, 120
 - employees, focus, 79
 - growth/maturation, 92
 - merger, 151
 - profile, values (incorporation), 88
 - purchase, reason, 152
 - success, 75
 - Compensation, 83–87
 - methods, alternatives, 85–86
 - non-partner incentive, 84–85
 - partner compensation, 86–87
 - purpose, 87
 - Competencies, 22
 - Compliance culture, authoritative leadership (impact), 54–55
 - Compromise
 - knowledge, 163
 - preparation, 158
 - Consistency culture (reinforcement), directive leadership (impact), 54
 - Consistency, rewards, 84, 85
 - Consulting services, purchase (steps), 140
 - Core values, 22, 190
 - communication, quality, 157
 - identification, 57
 - importance, 56
 - Counterparty, discussions/questions, 152
 - Crespo, Francisco, 125
 - Crossing the Chasm* (Moore), 137
 - C-suite commitment, requirement, 39
 - Culture
 - Accenture research, 42
 - assessment/management (importance), business leader recognition, 151
 - belief, 152
 - 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, evolvment, 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
 daVinci, 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 develop-
 ment, 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 (align-
 ment), 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/specifics, 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
 - impact, 81–83
 - 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

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, con-
 trast, 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/valida-
 tion, 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, rela-
 tionship, 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 (rela-
 tion-
 ship), 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
 - usage, 142
- 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, estab-
lishment, 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

- T**
- 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

- U**
- Umbilical cord, bungee cord (con-
trast), 134
- Unger, Sheryl, 163

- V**
- Valencia, Jordana, 154
- 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

- types, 22
- understanding, 162
- values-based culture, 31, 37
- values-based firm, agility, 28
- values-based hiring, implementation, 46
- values-based organizations, 22
- values-based purpose-driven firm, 28–29
- Vaynerchuk, Gary, 109
- Vendor/supplier alignment, 179
- Ventresca, Marc, 166
- Vision, 129–130
 - brand key element, 20–21
 - celebration, 156
 - creation, 60
- Visual representation, design, 16–17
- Visuals, usage, 127
- 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

