

# The Balentine Way



BALENTINE

**Demonstrate a Passion for Excellence** – Take pride in the quality of everything you touch and everything you do. Have a healthy disdain for mediocrity. Good is *not* good enough. Pay attention to the details and take the extra time to get things right the first time. Always ask yourself, “Is this my best work?”

**Honor Commitments** – Do what you say you’re going to do, when you say you’re going to do it. This includes being on time for all phone calls, appointments, and meetings. If a commitment can’t be fulfilled, notify others early and agree on a new deliverable to be honored.

**Practice Blameless Problem-Solving** – Just fix it. Demonstrate a relentless solution focus, rather than pointing fingers or dwelling on problems. Identify lessons learned and use those lessons to improve ourselves and our processes so we don’t make the same mistake twice. Learn from every experience.

**Get Clear On Expectations** – Create clarity and avoid misunderstandings by discussing expectations upfront. Set expectations for others and ask when you’re not clear on what they expect of you. End all meetings with clarity about action items, responsibilities, and due dates.

**Have a Growth Mindset** – What got us here is not the same as what will get us to the next level. Get outside of your comfort zone rather than stubbornly hanging on to old ways of doing things. Find a new and better way. See a world with no limits.

**Find a Way** – Take personal responsibility for making things happen. Respond to every situation by looking for how we *can* do it, rather than explaining why it can’t be done. Be resourceful and show initiative. Don’t make excuses or wait for others to solve the problem. Own the outcome by seeing issues through to their completions.

**Be Kind** – You have the power to choose your attitude, so choose to be friendly, helpful, and considerate. Pay attention to the tone of your voicemails, emails, and conversations. Be respectful and approachable, and avoid negativity and sarcasm. Your attitude is contagious. Spread kindness, optimism, and positive energy.

**Listen Generously** – Listening is more than simply “not speaking.” Give others your undivided attention. Be present and engaged. Minimize the distractions and let go of the need to agree or disagree. Suspend your judgment and be curious to know more, rather than jumping to conclusions. Above all, listen to *understand*.



# BALENTINE

**Speak Straight** – Speak honestly in a way that helps to make progress. Say what you mean, and be willing to ask questions, share ideas, or raise issues that may cause conflict when it’s necessary for team success. Be courageous enough to say what needs to be said. Eliminate gossip by addressing issues directly with those who are involved or affected.

**Be Responsive** – Respond to questions and concerns quickly, whether it’s in person, on the phone, or by e-mail. This includes simply acknowledging that we got the question and we’re “on it,” as well as keeping those involved continuously updated on the status of outstanding issues.

**Share Information** – With appropriate respect for confidentiality, share information freely throughout our organization. The more people know, the better we can collaborate. Learn to ask yourself, “Who else needs to know this?”

**Relentlessly Improve** – “Because we’ve always done it that way” is not a reason. Regularly consider every aspect of your job to find ways to improve. Try a new approach. Look at it from a unique perspective. Think differently. Share what you learn so that others can benefit from best practices as well.

**Be a Mentor** – We all have something we can teach, and we all have something we can learn. Take responsibility, both formally and informally, to coach, guide, teach, and mentor others.

**Be Curious** – In the search for the best solutions, challenge and question what you don’t understand. Don’t accept anything at “face value” if it doesn’t make sense to you. Be curious, ask thoughtful, probing questions, and listen intently to the answers. Be more interested in asking and listening than in speaking.

**Look Ahead and Anticipate** – Solve problems *before* they happen by anticipating future issues, planning for contingencies, and addressing them in advance. Work with appropriate lead times. Preventing issues is always better than fixing them.

**Embrace Diverse Perspectives** – Be open to learning from others, no matter what roles they have, and regardless of their ages, backgrounds, experiences, or tenures with our firm. We make better decisions when we consider multiple perspectives.

**Walk In Others’ Shoes** – Understand your clients’ and colleagues’ worlds. Know their challenges and frustrations. Be empathetic and see things from their perspectives. The better you understand them, the more effectively you can anticipate and meet their needs.



# BALENTINE

**Make Every Interaction Count** – Every contact with a client is an opportunity to create a positive experience. This includes calls, visits, voicemails, letters, e-mails, and every other communication. Make sure every interaction leaves our client feeling wanted, appreciated, and respected.

**Communicate To Be Understood** – Know your audience. Write and speak in a way that they can understand. Avoid using internal lingo, acronyms, and industry jargon. Use the simplest possible explanations.

**Be a Lifelong Learner** – Seek out and take advantage of every opportunity to gain more knowledge, to increase your skills, and to become a greater expert. Be resourceful about learning and sharing best practices.

**Assume Positive Intent** – Work from the assumption that people are good, fair, honest, and that the intent behind their actions is positive. Set aside your own judgments and preconceived notions. Give people the benefit of the doubt.

**When In Doubt, Communicate Personally** – When delivering difficult or complex messages, or in emotionally charged situations, speak “live” versus hiding behind e-mail or voicemail. When appropriate, follow-up in writing to confirm your understanding.

**Show Meaningful Appreciation** – Recognizing people doing things right is more effective than pointing out when they do things wrong. Show gratitude by regularly extending *meaningful* acknowledgment and appreciation — in all directions throughout our firm.

**Make Informed Decisions** – Make good decisions by relying primarily on facts and data, rather than solely on opinions or emotions. Be objective. Analyze the data and use this information to make better decisions.

**Be a Brand Ambassador** – We’re all responsible for, and benefit from, the Balentine image and reputation. Consider how your actions affect our collective reputation, and be a proud ambassador for the firm.

**Invest In Relationships** – Everything we do is built on trust, and trust is built on relationships. Make smart decisions that enhance long-term relationships. Get to know your clients, centers of influence, and colleagues on a more personal level. Strong relationships enable us to more successfully work through difficult issues and challenging times.

**Be Process-Oriented** – Create systems and processes that are scalable and support our ability to perform with consistency. Strong processes are the foundation of organizational effectiveness.



# BAENTINE

**Think and Act Like an Owner** – Make decisions by asking yourself, “What would I do if this were *my* firm? What would I do if this were *my own* money? Will this help the firm to succeed?” Be a good steward of our resources.

**Give Back. Pay It Forward** – Regularly seek opportunities to assist those in need. Express genuine gratitude for the help received by paying it forward and helping others. Be a servant leader and put the needs of others ahead of your own.

**Keep Things Fun** – While our passion for excellence is real, remember that the world has bigger problems than the daily challenges that make up our work. Stuff happens. Keep perspective. Don’t take things personally or take yourself too seriously. Laugh every day.

