Just like a team has a play for every down and distance, we have a plan for our process and purpose.

Why we created a playbook.

A traditional playbook contains descriptions of different offensive and defensive plays that are used by a team. Playbooks are designed to equip teams with a plan for almost every situation, putting them in the best position for success.

This is the DecisionGrid Playbook. Originally approached as an internal document for our team to reference, we wanted to share this with our clients, partners, and career-seekers to give a transparent view into who we are, what we do, and why we do it.

This is our purpose, our process, and our passion. And there’s a lot here. Just like a team needs a game plan to win, we need a plan to achieve our goals. Through transparency and authenticity, we’re able to define our daily routines and workflows and confidently communicate what we do and what drives us, both as individuals and as a collective unit.

Whether you’re interested in working with us or just want to know how often we get together, the Playbook is for you.
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Introduction

Organizations are wondrous creations. They are formed out of passion or necessity, or both. They change on an almost daily basis in response to the needs of the clients or customers they serve and, occasionally, because the people that make up the enterprise demand it. We believe that while we must supply a relevant, solid and cost-effective service, the dynamic key to long-term success is FIRST what we believe and how we treat the people who choose to work with and for us, and SECOND what we believe and how we treat the people of those organizations who chose to do business with us.

Business, like a game, has some basic principles that once recognized and understood can then be utilized to advantage. Really good organizations, as well as really fun games, have five things in common:

1. Defined goals.
2. Clear rules,
3. Qualified players who understand what they need to contribute to win,
4. A unified strategy (a game plan) for winning,
5. Competition, which implies a ScoreBoard, with a few important metrics that track whether or not your team is winning.

So, what follows is our Playbook in a game format.

I. The Goal (Why we exist)

   We are committed as a team to providing transformative services and information that enable others to grow their passion for good.

II. The Rules

   Our Manifesto

   We believe we are stewards, not owners, of the resources entrusted to us by a Creator who wants, works for, and desires that we work for the good of all people. Our commitment is to be at once responsible and generous, focusing our resources to help organizations make a positive contribution to the well-being of others.

   We model our beliefs in the way we do business, how we approach work, and how we share the fruit of what we do with the people who choose to work with us.
The way we do business:

Our intent is that in all the contacts that we have, people walk away from the encounter just a little bit better. We build mutually beneficial relationships through transparency, patience, and thoughtfulness.

The way we approach work:

Work is what we are made for; therefore, what we produce is important and reflective of our character. All our work is excellent.

Work offers dignity and opportunity. Our priority in adding team members is qualified women in need. To them we offer opportunity and support in terms of a work environment that takes into consideration the needs of the whole person – physically, spiritually, emotionally, and intellectually.

How we share the fruit of what we do with those who choose to work with us:

- All team members are compensated fairly.
- We model what we teach by being transparent and open with our own company financials and teaching our team how to read and use the information presented.
- We share profit with our team members.

a. Our Vision (Our Future Facts)

i. Customers – Our customers experience lively and ongoing growth based on the inspired decisions they are able to make based on the timely and accurate information we supply. We choose to offer our transformative services only to clients that are making a net contribution to improving the quality of life for their clients and their team members.

ii. Systems – Our systems for compiling and sharing timely and accurate information are constantly evolving in response to our team members’ needs and those of the people they serve. We are constantly evaluating our processes and systems to improve them and are suggesting the same to our customers. As a result, our systems and complimentary services set the industry benchmark.

iii. People/Culture – We constantly affirm that our team members are the primary reason for organizational success and growth. They are “engaged” in supplying the accurate and timely information our customers require for success. We choose and then cultivate team members who “own” the transformation that DecisionGrid
brings to its partner clients. Our culture is one of ownership, participation, growth, and cooperation.

iv. **Financial** – While our financial performance is always positive, it is not our goal to be wildly profitable, but to develop a financial model that equally benefits all our stakeholders – customers, team members, and owners.

III. **Players**

a. **New Hires**

i. **What We Look For**

1. Forget about resumes and cover letters. We’re hiring based on **future-perfect potential**. Cover letters only tell a small part of someone’s story and often resumes don’t reflect accurately the potential individuals have when empowered and offered the chance to excel. That’s why the most important part of initial contact is how individuals respond to the request to send “**anything that makes you stand out.**” This is the chance to show what you’re made of and to articulate a more accurate narrative of your story. Anything is fair game.

2. As a small team that aspires to be small, we’re people hirers more than we are role-fillers. A luxury of being small is that we’re able to be nimble and flexible in adapting to the skills and talents of our crew. Effort and an entrepreneurial mentality are the intangible requirements everyone must possess to be happy and successful at **DecisionGrid**. Being willing to go the extra mile and sustain a self-starter attitude are musts.

3. **What we don’t look for:** Jerks. Egos. Negativity. Pessimists. People who can’t appreciate a good cup of coffee.

4. **What we do look for:** People who give. Realistic Optimists. Humility.

b. **Hiring Process** - If someone is interested in joining our band of stewardship partners, job inquiries can be sent to us [here](#) along with a resume and “anything else that makes you stand out.” From there, applicants are contacted by one of our team leaders to set up an initial interview. There’s no need to prepare by perusing every “20 most common interview questions” article on the internet because we likely
won’t ask them. We prefer real, honest conversations – so just bring your best self, questions, and ideas.

c. How We Compensate Our Team Members (and why that is important to you)
   i. Normally, when inexperienced team members are added they are paid hourly for up to 90 days. The number of days is determined by the amount of training necessary to get them up to speed. After the DecisionGrid team is satisfied that the new Stewardship Partner can competently serve our customers, they move from an hourly rate to a salary which is reflective of their individual contribution to the team. Opportunities for salary advancement are directly related to the team member’s personal commitment to adding value to our customers and our team.
   
   ii. DecisionGrid team members also share in the profit they help generate. Annually, DecisionGrid hopes to pay profit-sharing bonuses to Team Members based on the number of dollars earned over a minimum percentage of net profit required to keep the company dynamic.
   
   iii. One of the things that is cool about how we pay our employees is that our Team Members don’t have to worry about showing up somewhere on a predetermined schedule to work. They can do the work necessary to provide customers with transformative services and information from any location they choose, as long as the work gets done and customers are happy. While we offer access to a large pool of DecisionGrid expertise, support, and even a physical place to work, employees can choose when and where they work best.
   
   iv. The way we compensate people is important to our customers because our team members are literally invested in their well-being and success as well as their own. They are motivated to transform our customers’ lives and businesses as well as to help each other take good care of the people and organizations that choose to do business with DecisionGrid.

d. A Day in the Life (How We Work)
   
   i. Three Keys to Organizational Success (BAM!)
      1. We know that culture trumps strategy every time. For us, that means that culture is the most important aspect of our business, and our continued success (and yours, too) depends on how we grow and nurture relationships with
our team members. To that end we first pay competitive wages and benefits while also providing a safe, comfortable, and playful work environment. Then, we constantly focus on three key ingredients of an effective culture:

2. Belonging

   a. We want all our team members to think their jobs at DecisionGrid are the best they can and will ever have. While we do not manage by consensus, we do believe that our team members are experts at what they do and how they serve customers and give our partners frequent opportunities to participate in planning and decision-making that affects their work life and customers.

   b. DecisionGrid is an “open-book” company. That is, we share financial performance and pay bonuses based on corporate performance. Thus our Stewardship Partner teams “own,” in a very real sense, the results of their individual and team performance.

3. Affirmation

   a. We work hard to manage by noticing and recognizing good performance. By focusing on what our team members do well and helping them to get better, the things they may not be good at become less and less important. That doesn’t mean that we don’t recognize and correct mistakes and deficiencies. What it does mean is that we don’t lead by constantly looking for things our team members don’t do well.

4. Meaning

   a. Work is important and meaningful. Our Stewardship Partners are encouraged, recognized, and rewarded for contributions that improve the working lives of our customers and team members.

   b. You have already read that we are transparent in our performance metrics and involve team members in strategy decisions and share the fruit of organizational success. We are confident that this approach to business ensures that our Stewardship Partners are actively engaged in the success of our customers and as a result, that of DecisionGrid.

ii. Our Environment - The DecisionGrid office is a collaborative, open space. Our workstations are community tables to promote
relationships and communication. You won’t find us in private offices with headphones on. We work together, communicate often, and almost always have a Pandora playlist playing throughout the office.

iii. **The Workday & Where We Work** - **DecisionGrid** operates on a “strictly performance” workweek. We thrive in a flexible work schedule, one that recognizes that working early in the morning, late at night, from a coffee shop, or from home is sometimes what works best. We require team members to get the work done well and on time. When they do that is up to them.

1. **Our office is open daily.** We offer a warm and cozy office space located near downtown, bottomless coffee and tea, the aroma of essential oils and plenty of cool playlists. The opportunity to be together as often as we can is what allows us to work collaboratively, conduct meetings efficiently, and strengthen company culture.

2. **Every month we have a DecisionGrid Team Meeting.** Normally, this is the only meeting we have where physical presence is encouraged. During this gathering, we review our performance, project what we plan to happen and have an opportunity to learn something new.

iv. **Holidays & Vacation** - We don’t negotiate vacation time here at **DecisionGrid**. That’s because we don’t need to. As long as the work is accomplished, team members are entrusted with developing their own breaks and taking vacation/sick days. With the ability to work remotely, traveling out of town does not have to mean requesting time off (although we still absolutely respect and honor “actual” vacation time).

v. **Professional Development & Personal Growth** - One of our core values is to learn something every day. Each team member is afforded opportunities to seek out personal and professional growth. We believe this to be essential to our commitment adding transformational value to our customers and our team.

IV. **Strategy**

a. **Acquiring Stewardship Partner Clients** – Our best clients are medium to small entrepreneurial 501C3, churches and for-profit startups who are focused on doing the right thing for their clients, customers and employees.
i. **Initial Inquiry** - The process of engaging a new customer begins when we receive a call, an email or we grab coffee and chat about how we can best work together. Upon reviewing the inquiry, our team follows up with questions and comments that help us further distill needs and desired outcomes.

ii. **Engagement** - With a solid understanding of goals, timeline, and scope, we put together a proposal for our relationship. This includes outcomes, investment amounts and timeline. Typically, our engagements are paired with a call or meeting to discuss specifics and details, as well as to answer any questions the potential client may have.

iii. **Getting to Know You** - An imperative early step in our process is ensuring we have a full grasp of our client’s organization and its needs - and most importantly, the client’s goals. Understanding vision and goals allows us to explore possibility and opportunity. An ideal client is currently faced with a challenge (and opportunity) and is looking to partner with us to provide solid solutions that give vitally useful decision-making information. While this conversation may reveal a lot of work on a client’s financial system, or just a little, we find that during our early conversations we set the foundation for effective relationship.

b. **What You Can Expect**

i. **Guidance** – Activity Review from an expert Stewardship Partner in the form of financial reports and a call or email highlighting the wins and/or losses for the organization over the time frame.

ii. **Peace of Mind** – We exist for the good of our customers. Our team members’ extensive knowledge and skillsets ensure that our customers never have to worry about penalties or important things falling through the cracks.

iii. **Transformations** – Our customers are able to leave a legacy because their organizations/businesses are transformed by the ability to focus on what is essential to living out their own passions in life and business.
c. **Our Unconditional 100% Satisfaction Guarantee:** DecisionGrid is committed to help you *grow your passion for good*. Foundational to fulfilling our mission is ensuring the information and tools we supply to you and your team are accurate, timely, and relevant. If, for any reason, you determine that we have not fulfilled our obligation, you simply do not pay. That’s it. You decide. If you’re not fully satisfied in any way with what we supply and how we deliver it, you don’t pay.

V. **The DecisionGrid ScoreBoard**

Our expertise ensures that you will have the information that is needed by your unique business situation. Following is a small sample of our ability to bring valuable information to guide your decision making processes.

a. **Monthly Metrics**
   i. Income
   ii. % Expenses
   iii. % Profit
   iv. Number of Clients or Donors
   v. Income/Client or Donor
   vi. Salary $ to get 1$ of Income
   vii. Return on Assets (net income/salary$)
   viii. Profit Sharing

b. **Annual Net Promoter Score (NPS)**

c. **Marketing**
   i. Number of New Clients
   ii. $ Expended/New Clients