



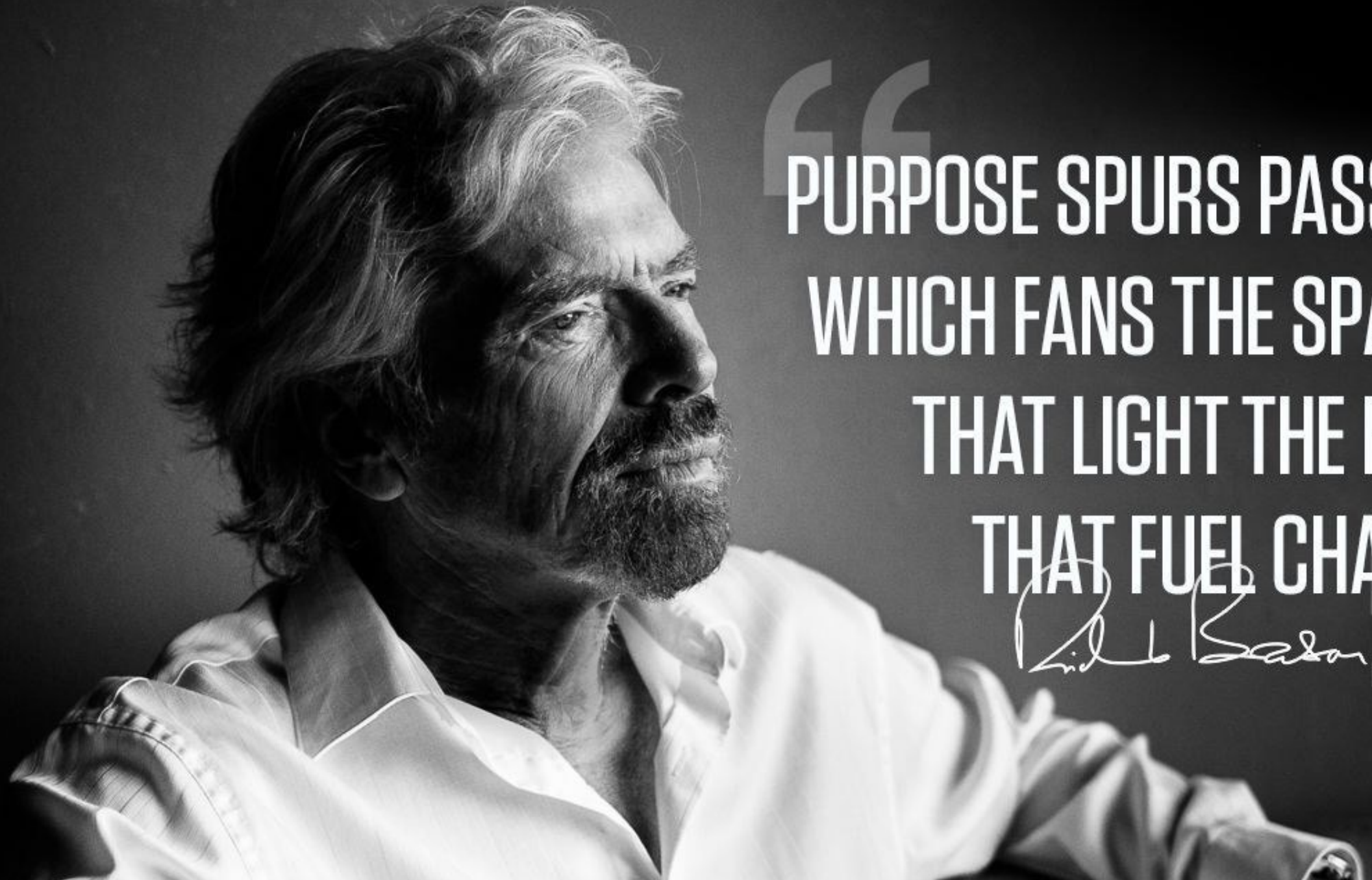
REALIZE STRATEGIES
People Driving Purpose.

Realize Talent, Culture & Performance Strategy



“PURPOSE SPURS PASSION,
WHICH FANS THE SPARKS
THAT LIGHT THE FIRES
THAT FUEL CHANGE.”

Richard Branson





We want everyone who works at Realize Strategies to be *inspired* by our purpose, *challenged* by the possibilities that exist around us, and *passionate* about realizing their full potential.





**We Seek Excellence,
Emotional Connectivity,
and Authenticity.**

Our culture enables us
to achieve these things.



We Believe in Using Business as a Force for Good in the World.

We're not ashamed to make a profit.
But we're driven by a purpose
that goes beyond profit.

The Foundations of Our Culture

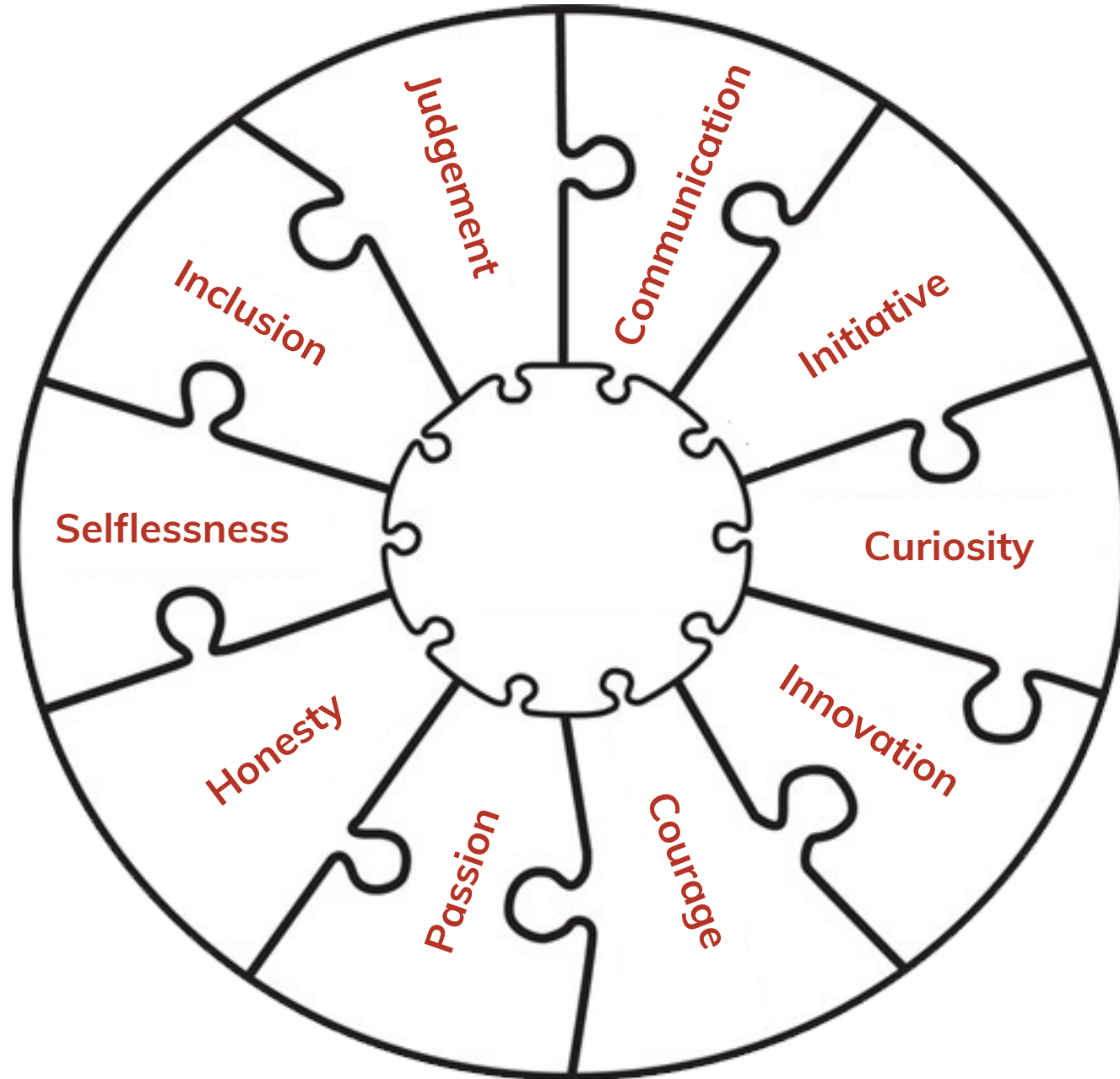




The Values That Define & Drive Us

We live by a set of values that propels our business forward and creates the impact we want to have in the places where we operate. Every member of our team exemplifies these values in everything they do.

Our Values





JUDGEMENT

You make smart decisions despite ambiguity.

You think strategically. You can explain what you are – and aren't – trying to achieve.

You focus on what must be done well now and know what can be improved later.

You know when to engage colleagues to help solve vexing problems.



COMMUNICATION

You listen well in order to understand different points of view and contribute positively.

You treat people equally with respect and accept and respect differences of opinion.

You speak up when you disagree, and always in a professional and respectful manner.

You understand that creative tension is healthy and positive and don't take conflict personally.

You are clear and concise both verbally and in writing.



INITIATIVE

You accomplish amazing amounts of important work.

You demonstrate consistently strong performance so that colleagues can rely on you.

You focus on outcomes rather than process.

You put positive community and client impact, and the interest of Realize Strategies above personal gains.

You step up and try despite not having all the answers.



CURIOSITY

You learn rapidly and eagerly.

You seek to understand our strategy, our market, our clients, and our community.

You contribute effectively outside of your role and job description.

You want to understand the “why” of everything we do.



INNOVATION

You conceptualize practical solutions to vexing problems.

You create new ideas that will benefit our clients and our organization.

You keep us nimble by minimizing complexity and focusing on results.

You aren't afraid to take risks and you embrace learning from failure.



COURAGE

You're not afraid to speak up and present a different point of view.

You would rather try and fail, than not try at all.

You question actions that are inconsistent with our values.

You're not afraid to question assumptions or propose new ideas.



PASSION

You are passionate about our mission.

You care about Realize Strategies' success.

You are inspired by using business as a force for good.

You celebrate accomplishments.

This is where you want to work.



HONESTY

You are candid in your interactions with others.

You value transparency and would rather have an uncomfortable conversation than let something go unresolved.

You don't take disagreements personally.

You are not afraid to admit mistakes.



SELFLESSNESS

You share information openly and proactively.

You make time to help colleagues.

You value ideas, not egos.

You seek what is best for Realize Strategies rather than what is best than for yourself.



INCLUSION

You celebrate diversity.

You create a safe space for dialogue.

You point out unconscious biases.

You create a welcome culture for others and are open to moments of humour and fun.

You listen, learn, and act.



High Performance

We're a learn-it-all culture, not a know-it-all culture. Every person at Realize is someone you respect and learn from.



GOOD
VIBES
ONLY

Amazing colleagues create an amazing workplace

We love our Thirsty Thursdays, our espresso maker, and our fantastic tea selection...

But what we really value are amazing colleagues who are driven by purpose and a passion for our business.



We set high standards for hiring

In creative work, the best are 10 times better than the average. So we place a premium on creating a high-performing team that delivers amazing results.

We value our culture and our business. We want to work with colleagues who share our passion.



High-performing jerks

There is no room for them at Realize Strategies.

They may generate impressive results,
but the impact on others and our culture isn't worth it.

Quirkiness and difference are good. We value distinct
personalities – as long they fit with our values.



Our culture is right for the right people

Our "right people" thrive in an agile, creative, intellectually challenging, and purpose-driven environment.

They choose to work and make a difference here. They are dedicated to our values and our culture, and aren't focused on fees as a measure of worth.

We want people who see Realize Strategies as their dream job.

In return, we'll give them a challenging and rewarding workplace filled with amazing colleagues.



We're a team

Everyone has role and we rely on every member of our team to help us take risks, innovate, and succeed.





Being a team means...

We hold ourselves to high standards, so we don't let others down.

We assist each other to reach our goals.

We don't tolerate "cut-throat" behaviour. It's a reliable path away from Realize.



Loyalty is important

Loyalty holds us together through rough patches.

We are loyal to colleagues who need a helping hand to get through a rough patch and we want colleagues to be loyal if

Realize Strategies hits a rough patch.

But loyalty isn't unlimited. We can't carry colleagues who consistently fall below our expectations.



Results matter most

We don't measure results by hours spent in the office.

We care about **outcomes** that propel us forward.

We'll reward colleagues who excel with additional responsibility, enhanced pay, bonuses, or other forms of recognition.



When we see colleagues struggling to deliver high performance...

We create an **action plan**, provide **coaching** and training, and set a **timeline** for achieving results.

If we aren't successful, we're generous in helping a colleague to transition to a new career outside of Realize Strategies.



Impact & Accountability

Everyone has the freedom to use their creative talents to enhance the positive impact we create for our clients and the communities we serve.

Our goal is to attract and retain passionate people who want to contribute to our success and be accountable to their colleagues for achieving amazing results.



Our ideal team member

- Independent and takes initiative
- Gets stuff done
- Creative and curious
- Accountable and doesn't let colleagues down
- Continuously strives to be their best
- Puts team ahead of self
- Picks up the trash lying on the floor
- Motivated by a purpose beyond profit





Multi-directional accountability

We are responsible for holding each other accountable to achieve amazing results.



Freedom and accountability go hand in hand

Freedom means a workplace where everyone can try out new ideas that fit our brand.

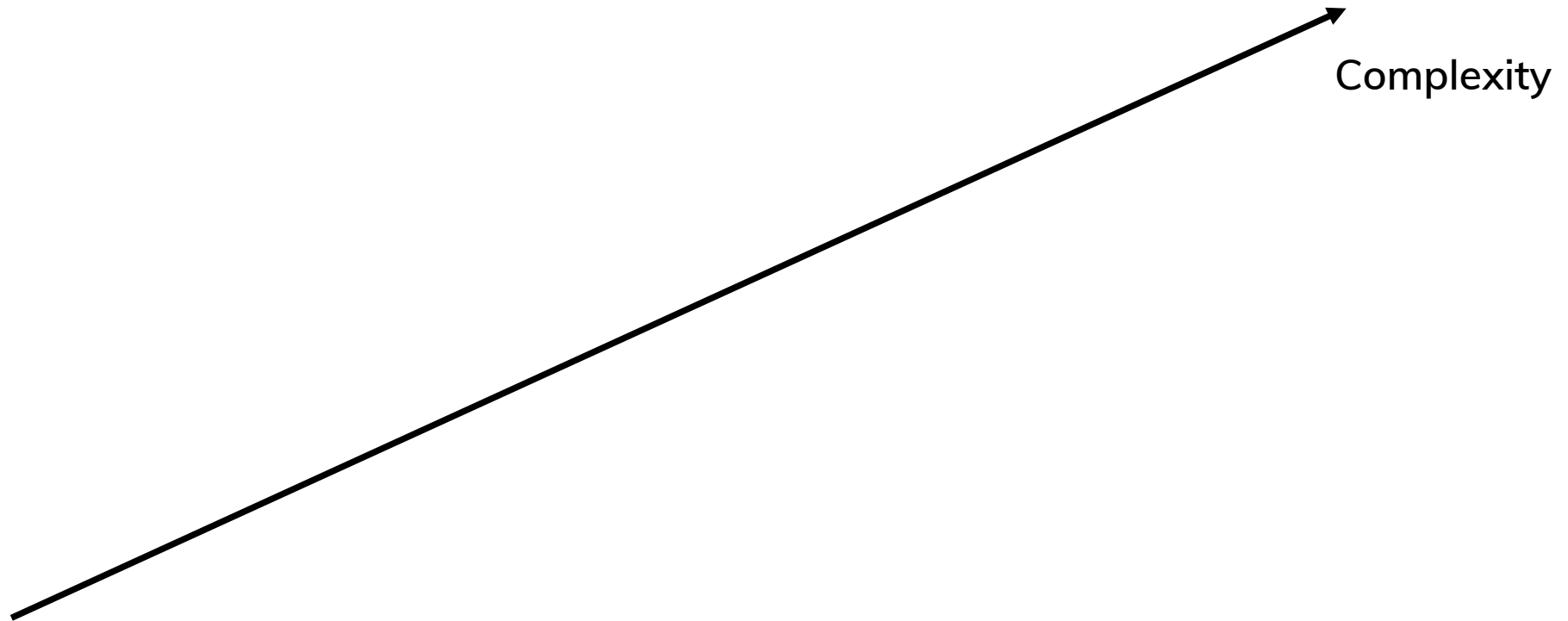
Accountability means we're accountable to each other for delivering results.



Why Do Most Companies
Curtail Freedom and Become
Bureaucratic as They Grow?

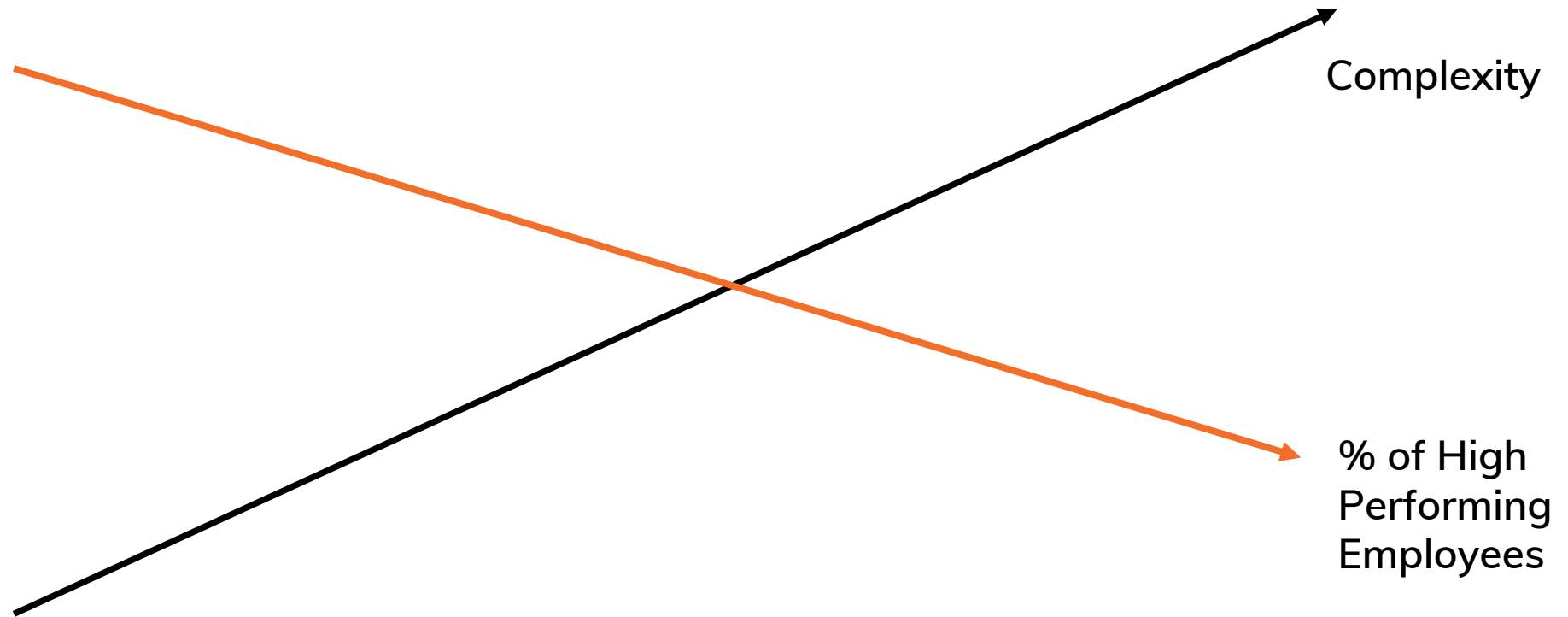


Growth Increases Complexity



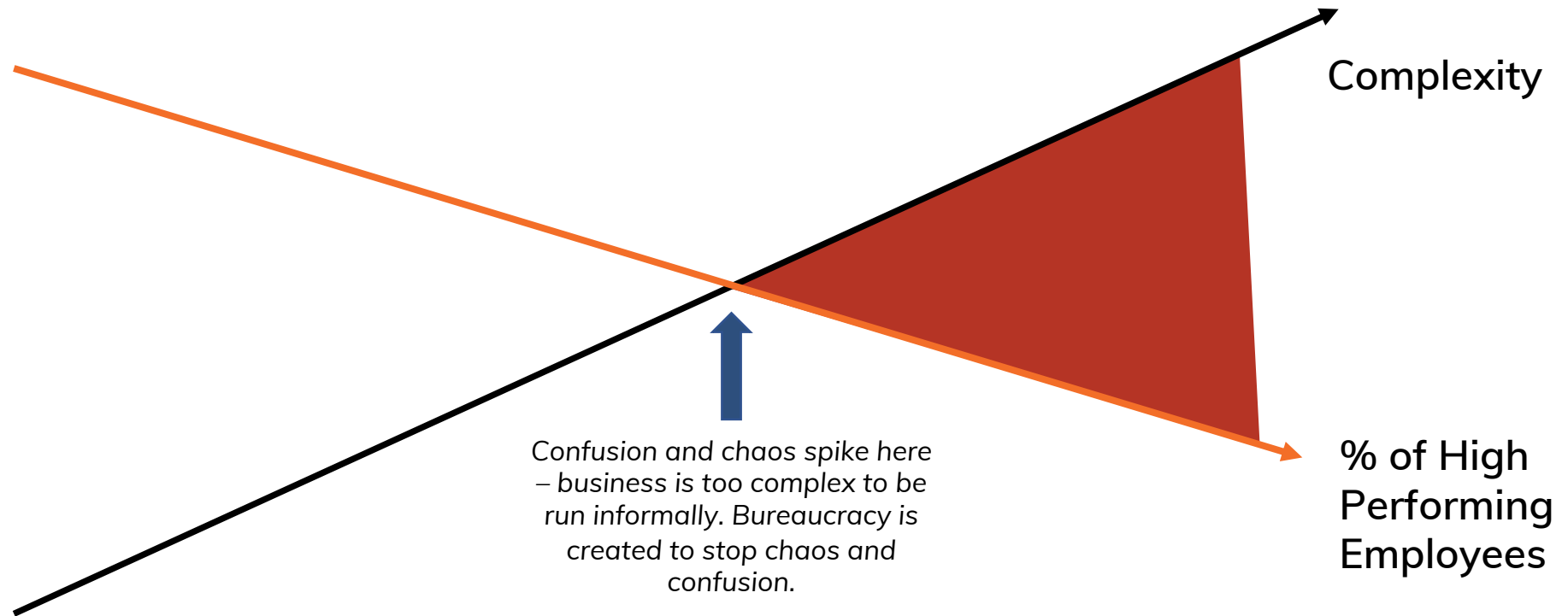


Growth Often Shrinks Talent Density



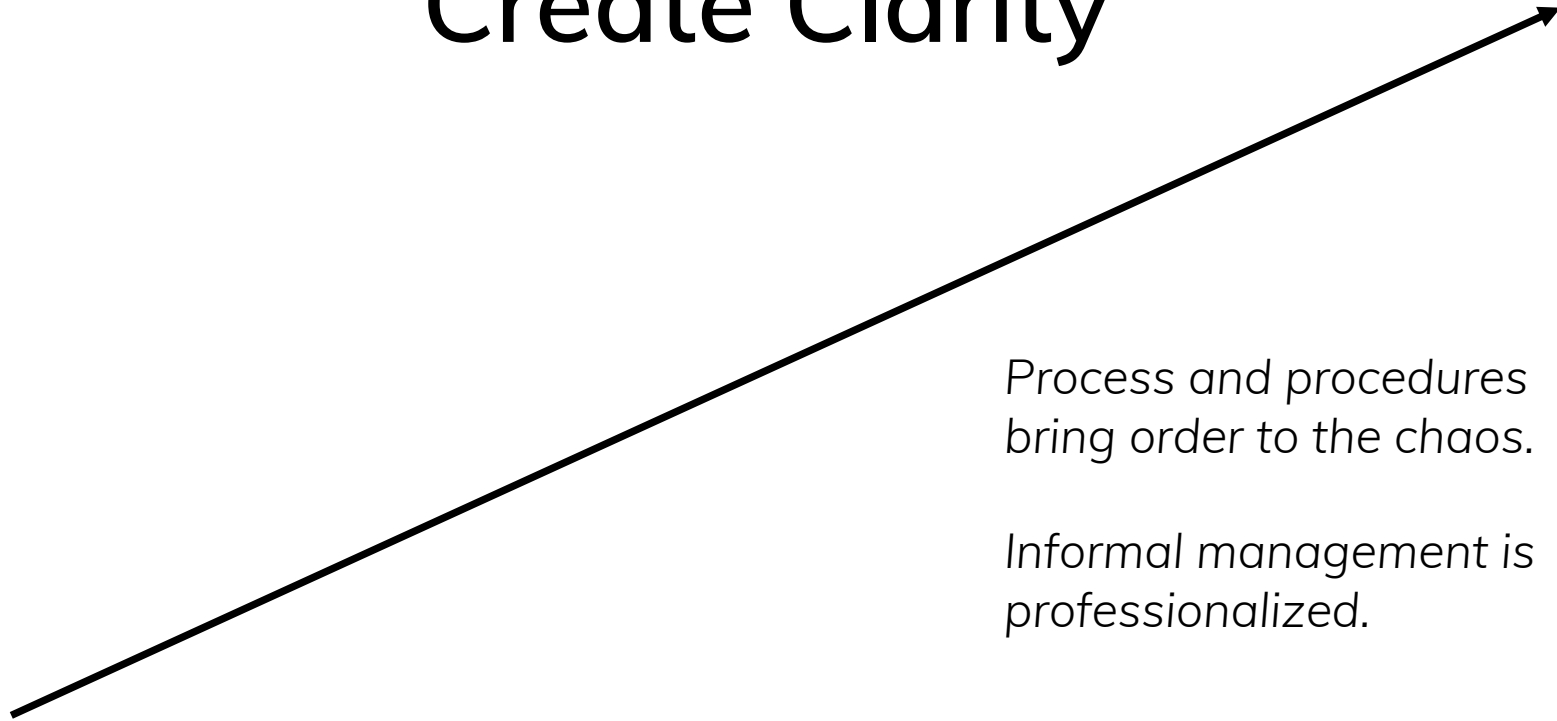


Chaos and Complexity Create Bureaucracy





Process and Procedure Emerges to Create Clarity

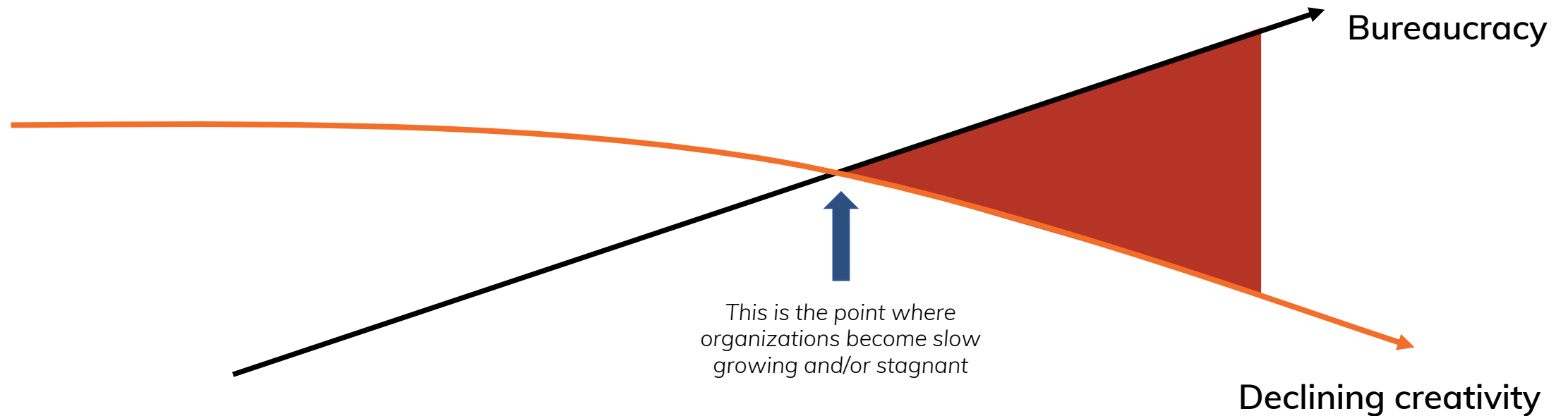


*Process and procedures
bring order to the chaos.*

*Informal management is
professionalized.*



Too Much Bureaucracy Can Drive Out Creativity

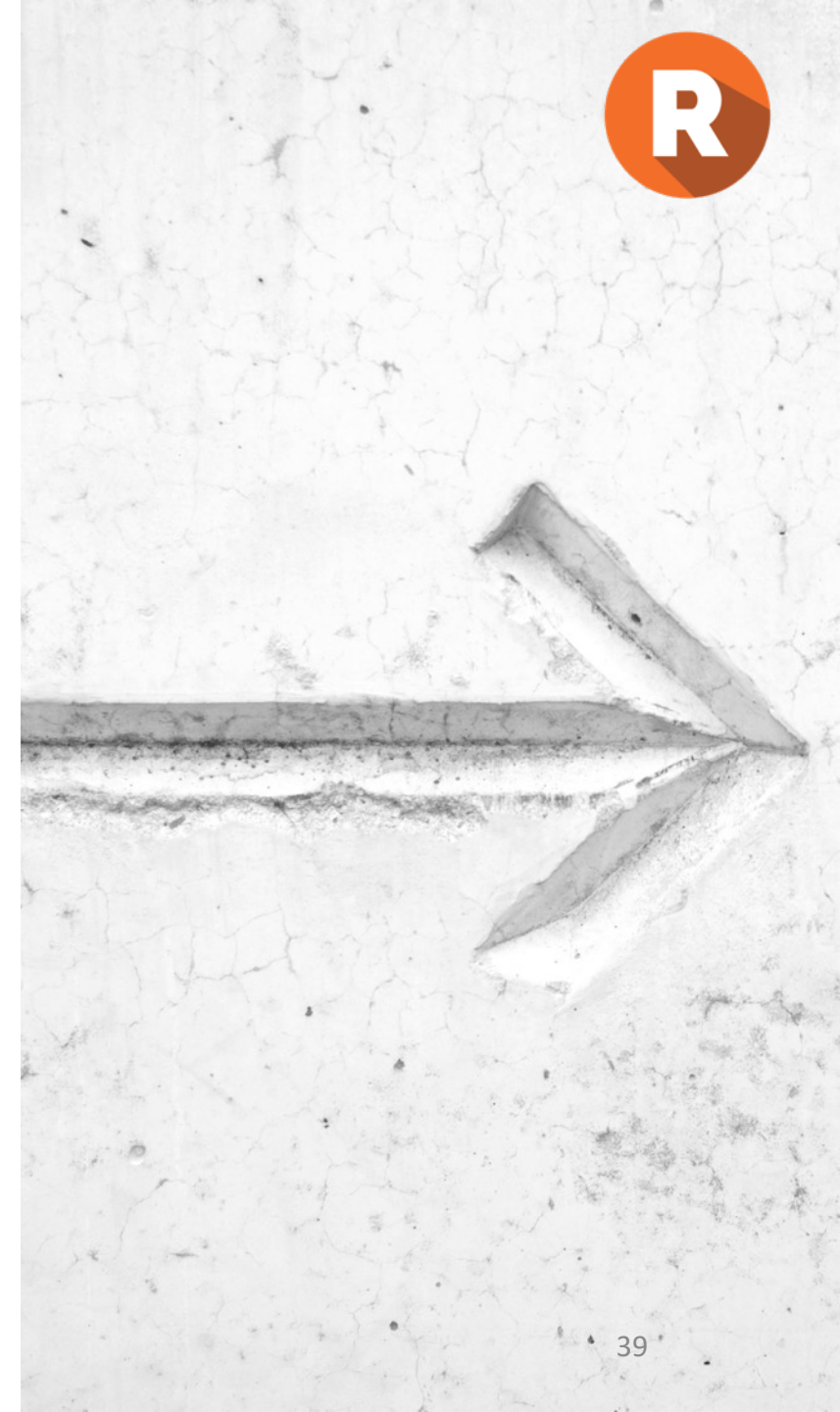




Process is a comfortable trap

A highly process-driven company:

- Requires minimal creativity
- Is very efficient
- Is optimized for current market realities
- Values efficiency over innovation
- Is highly susceptible to external market shocks when new competitors or innovations emerge





When markets shift...

Highly process-driven companies struggle to adapt quickly.

Processes are designed to maintain efficiency and predictability, rather than nurture agility and creativity. As a result, employees in a process-driven company struggle to respond nimbly.

And the company begins a slow, painful slide into irrelevance.



Two bad options for growth

- 1 Avoid rules as you grow and suffer chaos.
- 2 Use process as you grow to drive efficient execution of strategy, but cripple creativity, flexibility and the ability to thrive when the market inevitably changes.



The right option

Hire people who are passionate and creative high performers who are dedicated to our mission.

Introduce just enough process to prevent chaos from emerging.

Make accountability, self-discipline, and self-motivation the cornerstones of our operational processes and our success.

Then get out of the way and allow everyone to do great work.



Minimize complexity growth

Stay focused on a tightly interconnected set of offerings.

Guard against process changes that increase complexity and rigidity.

Always ask:

Does a new idea help us achieve our strategy?

Does it make us more resilient?

Does it address problems we're facing?



**Creativity in the context of
business betterment, resiliency,
and solutions is what drives us.**

Process is how we organize
and deliver meaningful outcomes.



Two types of necessary processes

- 1** Practices that help prevent chaos
 - Everyone updates their calendars for transparency and accountability
 - Everyone shows up to meetings on time
- 2** Rules that protect employees
 - Harassment and discrimination policies
 - Taking vacation to ensure employees have needed breaks



“Good” versus “Bad” process

Good process helps talented people get things done.

- ✓ Letting others know when you're working a new project (and need input)
- ✓ Regularly scheduled strategy and project meetings
- ✓ Clear approval processes

Bad process slows down productivity.

- ✗ Multi-level approvals for new projects
- ✗ CEO sign-off on every decision
- ✗ Permission to throw out a dead plant



Rule creep

“Bad” (unnecessary) process starts to creep in and can begin to substitute for good judgement.

We get rid of rules that aren't necessary. Principles and good judgement are often better than hard and fast rules.

We only have as much process as we need to drive results and sustain creativity.



For example: Our expense and travel policy is simple...

Act in Realize Strategies' best interest and use good judgement.

This means:

- **Use good judgement when booking travel or hotels.** A mid-priced hotel in the city centre is preferable to a cheap hotel in a sketchy area.
- **Eat well but avoid expensive places unless its to win or reward a high value client.** But don't eat chips for dinner because you're trying to minimize expenses.
- **Consider your own safety.** Take a taxi if you're out late and have a long walk back to your hotel.



Context, Not Control

The best managers get great outcomes by **setting the right context**, rather than by trying to control their people.



**Give a person a fish
and they eat for a day.**

**Teach a person to fish and
they eat for a lifetime.**





Context, not Control

Context (learning to fish)

- Strategy
- Goals
- Metrics
- Well-defined roles
- Knowledge of the stakes
- Transparent decision-making

Control (being fed)

- Top-down decision-making
- Management approval
- Planning and process more valued than results
- Lack of autonomy



Good context

- How your work connects to Realize Strategies' goals
- Priority-setting (what is important now, what can wait)
- Level of precision required
- Continuous quality improvement
- Key metrics/definitions of success
- Multi-directional accountability

High-performing people will do better if they understand the context. This is why we hold frequent team meetings and why we're open about strategies and results.



Mistakes often reveal weaknesses in the context.

When something goes wrong, ask what was missing from the context.

If you're a manager, ask yourself if you are articulate, inspiring, and clear about goals, strategies, and desired outcomes.



Exceptions to “Context, not Control”

Control can be important in emergencies - someone must make a decision on behalf of the organization.

Control can be important when someone is still learning their role.

Control can be important when the wrong person is in a role.

The background of the slide features several blue paper boats of varying sizes scattered across a dark blue, reflective surface. The boats are illuminated from above, creating soft shadows and highlights on their surfaces and the ground they rest on.

Highly Aligned & Mutually Accountable



The classic bureaucracy

- Senior management micro-manages everything.
 - CEO reviews and approves everything, no matter how routine.
 - Team members are told what to do and how to do it. There is no room for independent thought or creativity.
- Centralized, process-driven decision making creates stagnation and saps the organization of agility and energy.
- Creative change agents become burned out and disillusioned.



Independent silos (the free-for-all)

- Each group executes on their objectives with little coordination and no connection to organizational strategy and goals.
- The organization chases too many ideas and opportunities.
- Resources aren't directed where they can make the greatest impact.



Realize Strategies' model

Highly Aligned

- Strategy and goals are clear, specific, and understood
- Team interactions focus on strategy, goals, and effective execution
- Requires large investment of management time to be transparent, receptive, and empathetic

Mutually Accountable

- Everyone is accountable to the team and to each other
- Trust between individuals and groups sustains agility
- Creativity and independence are focused by mutual accountability to organizational goals and to achieving collective results.
- Team meetings help maintain alignment and accountability.



Accountability Partners

When you're performing well, your manager is more of an accountability partner than a traditional manager.

We strive to only have accountability partners.

Accountability partners guide, mentor, engage in problem-solving, help remove obstacles, and ensure you're meeting your goals.



When an Accountability Partner becomes a Manager

If a team member's performance isn't at the expected level, their Accountability Partner will become more of a traditional manager to help develop a plan to get back on track by setting and managing expectations and performance.



An effective highly aligned and mutually accountable team model depends on high performance and good context.

The goal is amazing results and demonstrable impact.



Living Wage & Benefits



Living Wage & Benefits

- We're a certified Living Wage Employer – and we're proud of it. This certification complements our personal and longstanding internal policy that the ratio of compensation between our most senior and junior team member will never exceed 3.5 : 1.
- Our benefit package exceeds what comparable sized firms provide.
- We want everyone to have economic security so they can focus on delivering amazing results. No one should need or want to hold a side gig to make ends meet.



Nothing stays the same

- We review individual compensation every two years and adjust based on the market for individual roles.
- Increases are based on exceptional performance. The amount will depend on our overall financial performance and outlook.
- Everyone is eligible to earn an annual bonus. The whole team will receive a bonus for meeting or exceeding our goals and targets.
- Individuals who deliver exceptional performance may also earn an additional bonus.



Let My People Go Hiking

- High performing organizations don't run on rigid 9-5 schedules
- They give people the freedom to create great results, make a difference, and live a good life
- We believe everyone should be able to take a day off to go hiking without using up vacation time – as long as you're on top of your work and being fair to your colleagues





Giving Back Matters

We believe in giving back to our community.

It's part of our culture and our identity.

We give everyone the freedom to contribute to volunteer causes during work hours.



Diversity, Equity & Inclusion



Incorporating diversity, equity, and inclusion in everything we do

We're the first to admit that we aren't perfect and that we still have room to improve on when it comes to diversity, equity, and inclusion.

But we're committed to practical action and not just theoretical exercises. This means taking a close critical look at our hiring, culture, and procurement practices.

Here are some ways we're moving forward.



Hiring

Realize is an equal opportunity employer and welcomes Black, Indigenous, and people of colour, as well as people across spectrums of gender, sexuality, age, and abilities to join our team.

We consistently review and evaluate how we can improve each step of the hiring process including job descriptions, how to proactively seek out and welcome BIPOC and LGBTQ+ candidates, as well as reflect on and address our unconscious biases.



Culture



All team members, regardless of job title or experience, are welcome and encouraged to share their opinions and ideas, even if it's contrary. While no one is ever promised “yes” for an answer, everyone is promised to have their voices listened to and considered equally.

We invest in people. Whether that means personalized professional development, flexible schedules, or advocating for mental health, we strive to help everyone realize their full potential.



Procurement

We are committed to purchasing core office products (at least 50% of expenses) from local independent suppliers. Whenever possible, we choose to purchase from, highlight, and recommend BIPOC-owned businesses.

We select suppliers who meet some or all of the following criteria:

- Locally-owned
- Are majority owned by women, BIPOC individuals, or other traditionally under-represented groups
- Certified by Buy Social Canada, B Lab, or comparable social screening system
- Are Certified Living Wage Employers
- Are social enterprises, co-operatives, or other forms of community-owned businesses



Promotion, Development & Recognition



Opportunity and growth are a state of mind...

In an organization that sets the
right context for disciplined creativity
and agile development.



Talented people will have opportunities to grow and develop at Realize Strategies, regardless of their position or role.

Opportunity and growth depends upon self-motivation, good context, and aligned managers who support and mentor but don't micro-manage.



Promotion

Promotion will be based on exceptional performance and a demonstrated readiness and capability to take on more responsibility.

Promotion doesn't always include a new title or supervisory responsibilities. In some cases, it might involve greater responsibility for leading and developing a critical aspect of our business.

Small organizations have a small number of managers. But the organizational structure should never hinder anyone from being given a bigger, more complex role.





Realize Strategies doesn't have to be your forever job

We want people who see Realize Strategies as their dream job.

But sometimes dreams change – and that's OK.

If someone leaves to pursue a new dream, we'll celebrate their contributions and wish them well on their journey.



Development

We develop people by giving them challenging work and a team of colleague who challenge them to deliver amazing results.


We provide annual professional development funding and internal learning opportunities.

We also support every individual to self-improve through experience, observation, reading, discussion and opportunities to propose new ideas aligned with our strategy and goals.



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