Founder Fodder

(old offline blog by Brie Wolfson)

What is this place?

Hi! I'm Brie.

I spend just about all my time researching, writing, and thinking about about the ways organizations coordinate. I came to this work because being a part of great organizations like Stripe, Figma, and Google changed my life and I decided to make it my life's work to help company leaders bring those same benefits to their people.

I've never been a founder and I don't aspire to be one. I'm not a venture capitalist or a recruitable employee either. I can't speak from any position of any real authority or status, but I do speak from the perspective of someone who cares a lot about this stuff. And I can tell you about the questions real founders are asking when no one they are trying to impress is watching and match them up with the tactics I've seen great organizations rely on.

Perhaps most importantly, though, I can tell you what works for those of us who work from the corners of an organization, trying to do great stuff that matters.

I hope you like it and I hope it's useful but, above all else, I hope it helps more people find even more pride, joy, and satisfaction in their work.

Thanks for being here.

If you want more Brie, you can learn about my past lives and work here.

Wanna Talk Shop?

Send me an email at brie.wolfson@gmail.com and we'll set up some time!

I also partner with a small handful of companies to bring the tactics I advocate for to life. If you're interested in being one of them, say hey!

How shold we think about our alumni network?

x mafia

(don't include these in this post) Thinking about your alumni network

There's an entire group of people that worked at your company can be useful to a company post-departure (ex- referrals, spreading news, advocating for stuff the company does, etc.). You can think of them as company activists!

Don't banish people once they leave but leverage that community and network to grow your own

Have an exit network they can join (run outside the company) like a Slack channel or an email list

Our All Hands is a time suck and not doing much good for the company. What should we do?

If your All Hands isn't going to be great, it's probably not worth doing. This is your company's stage!

Most companies treat All Hands like a broadcast mechanism for company news, but I find that the best version of an All Hands is more like a pep rally. You can get there by 1/spotlighting great work for everyone to see (and in doing so, train everyone on what great work looks like at your company) and 2/build a strong center of gravity for the company where everyone is let in on the same "for our eyes only" info at the same time.

And with that, some ideas for what you can do:

Move company news to another forum/format: For any company updates that you want to be sure the whole team sees and remembers, I think something async (like an email) is a better format because it's reference-able and less subject to telephone/memory fading. A ~weekly company digest could be a good fit for that (and here's a template for that). One tip is to create a google group (maybe called company-digest?) that anyone at the company can forward stuff to if they think it should be included in the digest. This makes the job of the person who sends it out easier by making them more of a reporter/summarizer than reporter.

Take down the cadence of All Hands: I often find that companies All Hands too often (especially smaller companies where everyone is interacting regularly). Go to monthly or biweekly so that you're not on some treadmill of getting not-so-great content out the door and can spend time curating and polishing the right stuff. Demos and under the hood stuff is always great. Remember, you can convene your team in other ways (Q&A, team meal, etc.)

Content leans more "under the hood" than news: for updates, async is better anyway (that way, people can reference).

Make it fun: especially while we're in and out of work from home, All Hands is competing with lots of other stuff; a workout, more sleep, Netflix, etc. Make it actually enjoyable to attend. This requires having mix of great content (go for lots of ooh and aahs) and moments of camaraderie from the team (ex- shoutouts, awards, fun group chat). The more personality, the better.

Review everything that is going on the company stage: The company needs your input as to what kind of stuff is worthy for company stage (quality-wise and context-wise). Before the digest goes out or the All Hands runs, make sure you have eyes on all the content and help ensure that everything goes out meets your quality bar.

Presenters practice: I'd recommend doing a full 'run of show" in advance of the real thing. This will give everyone an earlier deadline and ensure they have time to get feedback, practice, and even see how others do it. This is not micromanagement. This is helping your team members do their best work. I promise, they will appreciate it! Once you have confidence that the stuff going out will meet the quality bar without much intervention from you, appoint someone you trust to do the heavy review lifting. But I'd still have a way to poke your head in on everything.

Universally High-Signal Interview Questions

Every role/company combination will rely on a unique set of questions to predict candidate fit, but when you really get down to the essence of it, there are a few qualities that are virtues for every employee, no matter what corner of the organization they'll be working from:

Are they good?

Do they care?

Do they work well with others?

Here are some good (and tested) interview questions to get the conversation started.

As you ask them, I'd encourage you to dig in on non-work experience and interests, too. It will give you an even better sense of how transferable these qualities are. And plus, it'll probably make the conversation more fun and interesting for everyone.

Are they good?

In other words: Do they know what good looks like? Do they have taste? Will they go deep? Have they embraced a spirit of craft and taste in their work? How do they evaluate it in other's work?

Tell me about something you did or created that you were proud of. What made you proud?

Tell me about a time you shipped something you weren't totally proud of. What weren't you proud of? Why did it ship? Are you glad it did?

Who is doing work you admire in a field you care about? What do you admire about it?

You've been granted the ability to make one change in a product or service of your choosing. What is it? Why?

What term or concept in a field you care about is a misnomer? (For example, George Saunders doesn't like the word plot; he prefers "meaningful action." Patio11 doesn't like TL;DR because it assumes the reader is lazy; he prefers "summary". I don't like the word eyeballs (as in, impressions); there's a brain behind those we care about a whole lot more!

Do they care?

In other words: Are they willing to really invest in their work and community? Will they take ownership over it? Do they give a shit?

You are now the CEO of your current company. What would you change and how would you change it?

Who is your favorite user of something you worked on? Why?

What was a recent thing you felt justified in being a total pain in the butt about? Why?

What was the last thing that caused you to drop everything and get to work? (No example too small!)

Tell me about a time you fought for something you believed in at work. Where did things land? Were you happy with the outcome?

What was the last thing that got you really “in the zone”?

Do they work well with others?

In other words: Do better than the "no assholes" rule. Are they self-aware and/or aware of how others perceive them? Do others enjoy working with them? How do they communicate? Are they happy in groups, generally speaking?

Who have you worked with who you choose as your co-founder? Why?

Who would ask you to join a company they were starting? Why?

What's the best thing about working at a startup?

How have you changed in the last 2-3 years?

Describe a group you were a part of that was successful. What do you think made it so?

What was the last thing you learned from somebody else? What made their teaching effective?

What would your colleagues say they’ve learned from you?

Thinking about a recent cross-functional project you worked on, what wouldn’t have gotten done if you weren’t part of it?

When was the last time you changed your mind about something? What made you change your mind?

[WIP] Who should comprise our Leadership Team?

What is it?

who goes in it and why

how to eovlve and kick people out

how to run the meetings

using +1 team

how big is too big

all the great companies have these - J-team, S-team, etc.

[WIP] What should we include in our fundraising announcement email

balance of acknowledgement of great work to date and how much work is ahead

Finding is based on expectations of future value and performance,execute well to get there but we should take a moment to celebrate all our hard good work getting here

validation from greater market that this is something worth worknig on

Some startups make the mistake of valuing fundraises as ends in themselves, rather than as a means to an end. Complacency from a prestigious funding can kill a company. We can't afford that mistake: for all our progress, we are so far away from the scale of our ambition—to reduce or remove 500 megatonnes of CO_2 per year, fast. This fundraise will help us go faster, but the truly decisive factors will be the intensity of our everyday work and the climate success of our customers.

It's a sign of tremendous progress that existing investors, with inside knowledge of the strengths and weaknesses of Watershed, have doubled-down. They're excited about the epic potential of this market, the steep trajectory of our growth in 2021, the product we've built & the customers we help, and, most importantly, the people on this team. We have a lot to be proud of.

We have a lot of work ahead. This fundraise is a bet on the future: our investors believe we can build Watershed into a $10B+ company, and we're re-committing ourselves to that trajectory. To pull it off, we need to rapidly scale the team, win the climate land-grab, and delight the ballooning group of companies that trust Watershed with their climate programs—all at the same time. This will be hard.

This is a [tool] to help us go faster. Some stellar climate and business leaders are now helping to grow Watershed, we have the financial resources to go big, and we'll use the announcement to solidify our leadership in this market.

confidentiality (keep doing this before you can't, hearing about it in the news is awful)

naming investors

spectrum of yay to we've got work to do, if you don't do enough yay, your team won't know to celebrate

confidential in the SL

"sign that we are excecuting well and also that we have a lot of work to do

thank your team

fundraisign is not the point

-one thing I might acknowledge is that the unicorn status (i do hate that term tho) also comes with more eyes on you. this is a good thing for stuff like recruiting and probably sales, but also a scary thing because you are more under the microscope and competitors take you more seriously, have to be even more scrupulous meticulous etc etc

What should our leadership meeting look like?

These are the qualities I see in effective leadership meetings

They happen regularly: I have yet to see a high-performing, cohesive company (of any size) that doesn't have some version of a leadership meeting in place in place.

Trust: anyone in the room must trust each other enough to discuss freely in this space.

Enough time: enough time for everyone to process what's typically the most strategic, highest-level challenges the company is facing at any given moment. The group will often have to think and discuss/debate topics in order to make a decision so leaving enough time for all of that to happen is important.

Fun! Company leaders may not always get to have fun in their meetings–most of the time when they're in meetings, it's all eyes on them. Since this meeting is among peers, it can and should be more relaxed than others.

Agenda ownership and tracking: have a clear system for owning and defining the agenda in advance of the meeting and capturing actions during. This way, you'll be more likely to actually get to the topics that matter. Plus, you'll be able look back at the meeting history. An administrative business partner can be responsible for this. If not, design a rotation of ownership (ie- each exec takes a turn).

These are the qualities I see in less effective ones

Inviting too many people/the wrong people: especially if it impacts the ability to have open discussion. One way to think about who should be invited is who reports directly into the CEO. Some organizations will also create another tier of Leadership Meetings for the next concentric circle out–those who report directly to this who report to the CEO (also called +1's). People can always be invited for specific parts ad hoc (ex- head of recruiting for a recruiting update)

No agenda: having an agenda helps keep the highest priority items at the forefront of the discussion and ensure the group doesn't waste time

Too rigid an agenda: allowing the group some flexibility helps get the best ideas and decisions out in a meeting. If the group needs a few extra minutes on a topic, the meeting should be able to accommodate that.

Note: You do not need to keep the existence of a leadership meeting a secret from your team. There is no obligation to share an agenda or notes, but your team should be aware and comfortable with the fact that the company's leaders do convene.

How to make them great

I would recommend setting up your leadership meeting in a way that allows it to cover two critical aspects of leading the company. You can accommodate both in a single meeting, or split them out. But, be clear about which of these you are doing when.

Status Updates: company metrics performance

Decision-Making: guide ongoing strategy for the company

For Status Updates

Suggested cadence/timing: weekly, at the start of the week (ideally before the decision-making time) and can be relatively quick. 30-45 minutes is usually enough.

This is mostly an observability meeting. It's designed to catch issues as early as possible. Solutions come as follow-ups (which should be recorded and have an owner assigned).

Dashboards are a great starting point because this aspect of the meeting is most useful if you have clear company metrics/goals to review. Many 'status updates' are created bottoms-up (ie-people report on what they feel like reporting on). This creates blindspots and often muddles the critical distinction between inputs vs outcomes. By asking your teams to repot on metrics and/or progress on already-defined goals, you're more likely to have the conversation that needs to be had about getting there. It also helps keep the bullshitting at bay because it's harder to hide or bury stuff.

Have people prepare these in advance. Ideally they all live in some document that's easy to read/refer to later. Use a template to grease the wheels of putting those updates together (ex- what's working/what's not, wins/loses, etc.). Tracking over time helps.

Have a consistent owner for bringing the metrics each week. This may not be an exec team member, but they can deliver the information to an exec. Depending on the metric/measurement approach, it could be helpful to invite that person to the meeting.

Try to be as transparent as possible with the company when it comes to these meeting. Share notes and status updates as a common page any employee can see. This has the benefit of making it easier to keep the meeting small because people feel they don't have to be in the room to understand what is happening (can always redact items as needed, but the habit of sharing is good).

For Decision-Making

This sounds obvious but C-level executives should be decision makers. You can have other meetings with a broader group of leaders but for a decision-making meeting, the group should be kept small and exclude anyone who is not definitely in the position to make these top-level decisions.

Suggested cadence/timing: weekly, near the start of the week. Should be long enough to have substantive discussions. 30-60 minutes should be enough time but you might need more.

Ultimately, this meeting should be run by the CEO (ie-she should set the agenda). All attendees should be able to bring topics to the meeting, too.

Agenda considerations:

Things that might affect everyone at the company (ex- org structure, company strategy and execution, HR flags, company-wide issues/crises)

Decisions that can't be made async because they need substantiative discussions from different perspectives. Those decisions may not affect all teams at the company, but those executives can give perspective.

How do I know when it's time to make company culture a priority?

I bet you already know the answer to this because your gut is screaming something. In the early days of the company, when the team is very small and everyone is focused on a singular goal of building and shipping something users love, the culture stuff "just happens." As the company grows, and needs to start coordinating across more people to bring more of your stuff to more users in more places, it's time to start getting more prescriptive.

As the saying goes, eventually founders will have to transition from building a product to building a company. A good start to 'focusing on culture' is defining your operating principles. As Stripe co-founder and CEO says, "I think most companies start to explicitly encode and articulate their principles or values too late."

Beyond that, though, by putting some good systems and processes in place, you can help your team produce better work and make it much more satisfying to get it there. It's going to require your time and attention to get those things in place, but it's arguably the highest leverage thing you can do for your company.

Here's a list of signs you might be ready at your company:

Two people are meeting and you don't know what it's about…and it makes you more nervous than excited

You don't know personal details about everyone

Someone shares "the perspective of the company on x" and you disagree with it completely

Something shipped without your eyes that didn't meet your bar

A decision was made without you that went in a direction you wouldn't advocate for

You're arbitrating spats you find silly and/or think those involved should be able to arbitrate amongst themselves

You're asked to make decisions you think others should be able to make on their own

Your meetings feel useless and/or redundant

Two groups are working on exactly the same thing without knowing it

You receive two vastly different reports on the same workstream

Moved into an entirely reactive workflow (only have time for meetings and emails)

Somebody starts with a job title you’re confused about

Make marginal progress a lot of places but don’t get anything to completion / lots of little steps but no big strides

Old timer that was a great fit but is no longer contributing like they used to, maybe you think they should move on

If you're starting to see these things crop up at your company, here's a podcast I recorded with Erik Torenberg about the tricky transition from building a product to building a company and what you can do about it (summary on Founder Fodder here).

How can I raise the quality bar at our company?

One reality of your company is that most of the work will be done by other people. And if you want that to be great, by your standards, you need to show and tell your team what those standards are. And, ask them questions that

Leaders are responsible for clarifying and upholding the company's standards for the work. This applies not only to the work-product, but also the way the work gets done and how you talk about it (internally and externally).Here are ways you can advocate for great work while it's happening. The more clear and consistent you are about what the company's standards are, the better your team will get at doing this without you in the room.

Then, here's some quesions you can ask

No matter what corner of the organization you're working from, you are responsible for upholding your organization's values and standards.

The Shipping Great Work Issue contains a collection of tactics for helping everyone at the organization produce high-quality work. This field guide is designed to help you bring that spirit to not only your work, but also those around you, while the work is happening.

For Leaders: Questions to ask in reviews

Most of the work at your company will be done by other people. Leaders are responsible for clarifying and upholding the company's standards for the work. This applies not only to the work-product, but also the way the work gets done and how you talk about it (internally and externally).Here are ways you can advocate for great work while it's happening. The more clear and consistent you are about what the company's standards are, the better your team will get at doing this without you in the room.

If you were to crack open an original Macintosh, you would find a piece of plastic engraved with the signatures of the team that worked on it. Why? Because artists sign their work.As you read these questions, consider what questions you would have to ask to make you and your colleagues want to sign the work you put out into the world.Think of this section as a script you're feeding to a little birdie that will live on your shoulder. Better yet, make that birdie a parrot so it's chirp, chirp, chirping these questions all the time. Translate them into your own style when you take them to the team. When you ask these questions, don't accept excuses. Even good ones.

Doing the work

Ambition

How could this work?

What does the wildly successful version of this look like?

How could this 100x?

Front page test

Would we be comfortable with this showing up on the front page of a major newspaper tomorrow?

Differentiation

What have others done? How can we improve upon it?

What's the way to do this that only we could pull off?

Edge

Who would this offend?

What do they believe that we don't?

Quality

What would make this 10x better?

Who is doing work that we admire here? How would they solve this?

Speed

How can we ship sooner?

How can we improve faster?

Vision

What does this look like in the end state?

Does this serve the purpose of our company?

Is this helping us achieve our mission?

Users getting what they deserve

What's blocking?

How can they get it sooner?

Minimum awesome product

How can this be launched with less?

How can this be validated with less?

What small thing can we ship to help us validate the bigger ship?

Building from first principles

If you were to start from scratch, how would you build it?

Why are we doing it this way? Why? Why? Why?

Simplicity

How would you expect someone to explain this in a tweet?

How can we pare it back to its most essential components?

Talking up

How would you say it if you assumed the user knew a lot about this already?

Precision about language

What do you mean by that?

Can you be more specific?

Compelling

What would make someone want to tell someone else about this?

Why would someone subscribe to hear more from us about this?

How we get there

The right people in the room

Who should be included in this decision/discussion?

Who is closest to this work?

What does $person-with-critical-context think?

Small groups cranking

How can we streamline the working group?

Is everyone contributing meaningfully?

Levity

Have we had any fun with this lately?

How can we introduce more joy?

Turpentine

Have any users seen this yet? What did they say?

Whose problems are we solving?

How would our users talk about this?

Sound decisions

How did we make this decision?

How confident are we?

What would increase our conviction?

Peer reviewers

Who outside the core working group looked at this? What did they say?

User feedback

Who from your target audience has tried this or seen this? What did they say?

Data-informed

What would the data dictate we do?

How would the data answer this?

Surfacing fears, uncertainties, and doubts

What do you have FUD about here?

What isn't working?

A few choices

What are my discrete options?

Why would I choose one over the other?

What would you choose?

Intuition

What does your gut say?

Planfulness

How does this fit into our broader company plan?

Are we doing what we said we'd do?

Bringing others along

How were those impacted by this decision, but not included in making it, informed?

Self-sufficiency

How can you get this done?

How can you unblock yourself on this?

Ownership

What can you do, alone, to improve it?

How can you specifically contribute?

Papertrails

Where is this documented?

If the working group disappeared tomorrow, how would someone else know how to pick the work up?

Building organizational context

How can I follow along with how things are going?

Where can the rest of the company go to learn about this?

or Operators: Owning your work and making it greatThink of this section as a prescribed set of health checks you apply to your work and how you show up before it goes out into the world. Plus, if you're sick, you might be contagious; it's best to get well before you get shipping. Tune the criteria to match your own style when you use them to evaluate or express yourself.

This work

Four "ayes"

At least four (ideally discerning) people (ideally with some expertise or take in the outcome) have looked at this and agreed it's ship-ready.

Home page test

If my work ended up on our company homepage, it would fit right in. I'd be proud of it and I'm confident others across the company would be too.

The person I admire

If this work got in front of someone I admire (make that person a specific, not generic, person), I'd be proud they saw it. I'd be enthusiastic if they assumed the quality of this work representative of the quality of all my work.

Point-of-view

My work has a clear perspective or differentiator.

User perspective

I can speak confidently to what the consumer of my work will think of it once it ships.

Getting it there

Escalated appropriately

I've consulted the appropriate decision-maker for any aspects of my work I wasn't sure about

Dirt under fingernails

I've gotten into the weeds on this work to make it great. Others can tell because the small details are polished.

Refusal to be blocked

When things that have impeded my progress or speed, I have been relentless about finding ways around them

Speaking up with good feedback

For the work I contribute to, but don't own, I've spoken up with feedback that contributes to making the work better

Bake cupcakes first

When faced with a big idea or project, I validate my assumptions and build conviction through smaller initiatives

All work

Awareness

I am clear on my company's values and standards. And if I'm not, I've asked for clarification.

Self-awareness

I know what role I play in this work. I know how I can and should participate and contribute (or not!) to the current work and its evolution.

Stewardship

I know how I am expected to uphold our company's values and standards in my work, and I do that.

Modeling

I believe my attitude and work product is an example for others at the company. I am proud of how I show up to my interactions with others.

Values <> Behavior alignment

The behavior I observe aligns with the company values that have been articulated to me. When they don't, I ask for clarification.

Questions to ask in reviews

Reminder: Great leaders are distinguished by their ability to influence the work and attitude of those around them. They come in many forms and can operate from all levels, with any title.

Most of the work at your company will be done by other people. Leaders are responsible for clarifying and upholding the company's standards for the work. This applies not only to the work-product, but also the way the work gets done and how you talk about it (internally and externally). Here are ways you can advocate for great work while it's happening. The more clear and consistent you are about what the company's standards are, the better your team will get at doing this without you in the room.

Putting this into action: Think of this section as a script you're feeding to a little birdie that will live on your shoulder. Better yet, make that birdie a parrot so it's chirp, chirp, chirping these questions all the time. Then, pass it through the filter of your style when you take them to your team. When you ask these questions, don't accept excuses. Even good ones.

📖 Company Story

If you were to crack open an original Macintosh, you would find a piece of plastic engraved with the signatures of the team that worked on it. Why? Because artists sign their work, and the Macintosh was a work of art. As you read this chapter consider what questions you would have to ask to make you and your colleagues want to sign the work you put out into the world.

Relentlessly advocate for

How to ask for it in the run of work

THE WORK

Ambition

How could this work? What does the wildly successful version of this look like? How could this 100x?

Front page test

Would we be comfortable with this showing up on the front page of a major newspaper tomorrow?

Differentiation

What's the way to do this that only we could pull off?

Edge

Who would this offend? What do they believe that we don't?

Quality

What would make this 10x better?

Speed

How can we ship sooner? How can we improve faster?

Vision

What does this look like in the end state? Does this serve the purpose of our company? Is this helping us get there?

Users getting what they reasonably deserve

Why can't they get this? Why isn't this done yet?

The smallest shippable unit

How can this be launched with less? How can this be validated with less? (Do that!)

Building from first principles

If you were starting from scratch, how would you build it? Why are we doing it this way? Why? Why? Why?

Simplicity

How do you expect someone to explain this in a tweet? How can we pare this down to its most essential components?

Talking up

What would this say if you assumed the reader knew a lot about this already?

Precision about language

What do you mean by that? Can you be more specific?

Compelling

What would make someone want to tell someone else about this? Why would someone subscribe to hear more from us?

Customer Magic Moment

Does this get users to their magic moment sooner?

Customer Bad Day

Does this increase the likelihood of a user having a bad day?

GETTING IT THERE

The right people in the room

Who should be included in this decision/discussion? Who is closest to this work? What does $person-with-critical-information-or-context think?

Small groups cranking

How can we streamline the working group?

Levity

Have we had any fun with this lately?

Turpentine

How would your users do this? How would your users talk about this?

Sound decisions

How did we make this decision? How can we build even more confidence in this direction?

Peer reviewers

Who outside the core working looked at this? What did they say?

User feedback

Who from your target audience used/looked at this? What did they say?

Data-informed

What would the data dictate we do? How would the data answer this?

Egoless debate

What would someone who disagrees with you say? How would you address their concerns?

Surfacing FUD

What do you have fear, uncertainty, or doubt about? What isn't working?

Three options

What are my three options? Why would I choose one over the other? Which would you choose?

Intuition

What does your gut say? Why?

Planfulness

What are we doing? Is it what we said we'd do?

How does it fit into our broader plans? Does this drive progress towards the things on our "must get done" list?

Bringing others along

How were those impacted by this decision, but not included in making it, informed?

Self-sufficiency

Do you need anyone else?

Ownership

What did you/can you, alone, do to improve it?

Directness

Did you address this with the people working on it?

Clearly-defined roles

What is each member expected to contribute? How will they deliver?

Succession plans (preemptively written)

If the working group disappeared tomorrow, how would someone else know how to pick the work up?

Papertrails

What happened when you got together? What decisions were made? What are the next steps?

Building organizational context (distribution)

How can I follow along with how it's going? Where can the rest of the company go to learn about this? Where do the people who should know about this go to learn things?

Metrics

Does this impact a top-level metric? To what extent?

Must not churn

How will this impact those on our must not churn list?

Transitioning from Building a Product to Building a Company

Many founders come knocking on the Kool-Aid Factory door when they start feeling like the culture is slipping away. Our calls often start with some version of "I can't believe this thing happened at our company." It's a scary moment but it's also part of realizing that company-building is going to be as important as product-building going forward.

Here are some of the ways I've seen leaders gracefully navigate that transition from building a great product, to building a great company.

I also talked to Erik Torenberg about these transitions, and culture more broadly–you can listen to that conversation here, on Village Global's Venture Stories podcast.

From: company values and norms are upheld naturally

To: company values and norms need to be articulated

Derek Sivers said,"when you make a business, you get to make a little universe where you control all the laws. This is your utopia."When your company is just getting started and the team is still small (and probably full of people you know personally and/or have worked with before), everyone probably has the same definition of utopia. Everyone on the team probably thrives naturally in your little universe without much intervention.

As the needs of the business and organization change, you're going to need to bring on people with new kinds of skills and experiences and backgrounds and interests. And when that happens, it's going to be harder to tell whether everyone still shares that definition of utopia. That's when it's time to start writing those down.

A shared agreement about what matters and how to get the work done and how to make decisions between reasonably good options is going to make the work better and bring your team closer. It's also going to help ensure that you hire and retain the right people and perhaps more importantly, don't hire/retain the wrong people.

From: individuals are the building blocks of the company

To: teams are the building blocks of the company

In the early days of building, the relationship of individuals to functions is typically 1:1. In other words, a single person is responsible for all of the company's security, and another person is responsible for all of the company's marketing.

So, it follows that you can get the best state of the workstream by talking to the single person. But, as the workstreams get more complex and organization sprawls, it's unlikely that a single person can provide the full and reliable state on progress. So, founders are left to piece together the story based on a series of individual conversations. They go chasing information to reconcile conflicting reports or fill in gaps. It's telephone meets Tetris. It often feels like a fools errand, but it's better than ignorance. And on top of that, it leaves many founders with a calendar of back-to-back one-on-one all day every day.

There is a better way! As the building blocks of the company moves from individual to teams, leaders can also transition the way they preside over the work from 1:1's to a series of forums. Some of these forums will sound familiar–quarterly business reviews, launch reviews, product reviews, security reviews. Many founders are surprised by how much less time they need to get higher quality insight and oversight over how work is going.

Another (more subtle but equally impactful) benefit is that forums create less political organizations. By bringing groups together, leaders have to do a lot less playing 'telephone meets tetris' and focus on the work itself. By orienting the company around the work instead of around the people who are producing it, things feel less personal/emotional for those involved which, in turn, helps everyone embody a more clear-eyed perspective on how the work is evaluated and pushed forward.

From: team members grab their own work ad hoc

To: getting crisp and prescriptive about who does what when

Early in a company's life, knowing what to work on comes naturally. The team is probably operating in that blissful state of sharing a single vision, mission, or goal while having the precise combination of complementary skills required to get there. Everyone picks up the work in ways that just make sense. Ownership is clear. Coordination doesn't take much thought. Stuff just gets done.

But, as a single centralized team becomes more loosely coupled and the company moves towards a multi-lane highway of product development, it's time to create some more formal systems for deciding what to work on and coordinating how to get there. When it comes to the work, this might entail a more structured process for planning and reviewing work. When it comes to the people, this might entail rolling out performance expectations via ladders and levels or introducing a management layer.

But no matter what it is, there is a lot more prescription required to ensure the whole organization is rowing in the same direction. It's a magical place to be!

From: trusting your intuition about how things are going

To: leaning on systems and processes to keep tabs on how things are going

I hear from a lot of founders who have recently been surprised–and not the fun kind. They had no idea this top performer was going to quit or this top user was about to churn. They couldn't believe this thing took so, so, long to launch. They saw someone hired for a role they don't think the company needs. Information still reliably flows to them, but it no longer paints the full picture required to run the company well.

This is when it's time to start building out systems to keep the pulse on the org. This might come in the form of getting more serious about metrics and reporting, rolling out an employee voice survey, proactively soliciting user feedback, initiating some skip-level 1:1's, or doing some 'core sampling' to get sporadic thoughts from trusted team members.

It takes time and discipline to set this up, but it unlocks more rigor in evaluating how things are going and through that, a shared understanding and confidence in articulating how things are really going that everyone can work from.

From: Information moves through osmosis to the right places

To: Prescribing systems for information flows

One of my favorite essays of all time is Bill Gate's 1999 New Rules for Work. In it he describes a 'digital nervous system' that organizations can take advantage of to run maximally smoothly and efficiently. In his words, "the old saying knowledge is power sometimes makes people hoard knowledge. They believe that knowledge hoarding makes them indispensable. Power comes not from knowledge kept but from knowledge shared."

Early on at a company, knowledge is shared by default. It moves in an almost osmosis-like way without any intervention. All the stuff worth sharing gets passed along or is easily pieced together over lunch, at the proverbial water cooler, or by simply poking around Slack, dipping into meetings, asking a friend, or reading a few docs.

But, there always comes a time when that becomes too much for any individual, especially the founder, to keep up with. That's when prescribing a set of communication norms and channels comes in handy. That way, everyone knows where to go to find what they need to advance their work and operate with appropriate cross-functional context and knowledge.

Another way to think about this is the attitude of the work everyone sees. Instead of asking everyone to look at the ground-level stuff, everyone is encouraged to share a more curated and summarizing account of the work they're doing. This is the best way to get the knowledge and experience of all the great work going on out of the corners of the organization and into the library of shared knowledge in a way that's more easily consumed by a more global audience of their colleagues. And, it's a much better way for leaders to not only keep tabs, but also reinforce and spotlight the stuff they want to do more of.

This comes through mechanisms like All Hands, designing the right set of Slack/email channels, getting more thoughtful about internal comms, defining transparency norms, and more.

If you're looking for more help navigating these transitions, say hey! I'd love to help!

The Five Types of Good Process

All companies rely on a set of processes to get the work done. But I'm here to stick up for process, done right! Because when you have the right processes in place at your organization, it doesn't feel like you're "bogged down with process," or "moving at a glacial pace," "walking in a dinosaur's tracks," "running with a weighted vest on," (all terms I've actually heard). It feels like the organization is humming. Because it is!

Here's an overview of the different kinds of processes I've seen great organizations rely on, why they exist, and how they might be able to help get your organization humming.

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1. Observability Mechanisms

Observability mechanisms help teams keep a pulse on their own work and share that with stakeholders and onlookers… without having to ask. To gut-check on whether your observability mechanisms are good ones, ask yourself, "if someone visited this dashboard with no context on our work, would they leave with an accurate understanding of how things are going?"

Teams benefit by building better (and shared) literacy for how things are going, generate the perspective that helps them notice trends, and even catch small aberrations before they become big mistakes. Over time, they also create an artifact of the team's progress over time.

Stakeholders benefit because they have visibility on how the work is progressing… without having to ask. We've all had that "CEO is pinging about x, get all hands on deck," and "Y from team A is checking on x, can you share an update?" moments. These mechanisms get ahead of those interruptions and promote visibility on work by making information reliably available to the rest of the organization proactively.

It'll also show curious onlookers what their colleagues are up to, and what kind of impact they're driving, which facilitates meaningful cross-company connections and pride in the collective work.

Examples: dashboards, snippets/5:15's

Typical forum qualities

Host: workstream owner

Cadence: depends

Format: asynchronous

Content owner: workstream owner

Escalation/final decision maker/approver: closest leader

2. Rudder Mechanisms

Even the best-laid plans will require many, many adjustments as the work progresses and the team learns new things. Like adjusting a rudder to steer a boat, the small movements made in the-run-of-work (especially those early in the work's life) will have a meaningful impact on where the project ends up.

Rudder forums help workstream owners make ongoing decisions that drive towards the outcomes of the plan, often with the support of others around the organization. They're also a great opportunity to share and discuss learnings from the ground-floor with reviewers and onlookers.

Remember, asking to see work is not an implicit criticism or a breach of trust. It is a signal that you care about your users, your products, and your team. If you run these forums well, they can build trust and maintain a shared view of the state and direction of work across the team. They can also train participants to make better decisions in the future that will help everyone move faster, ship better, and help others do the same.

Examples: leadership meeting, check-in's on plans (like QBRs), product reviews

Typical forum qualities

Host: company/team leader

Cadence: regular

Format: asynchronous

Content owner: workstream owner

Escalation/final decision maker/approver: closest leader

3. Standards Mechanisms

All the company's work must uphold the values and standards of the company. Not some of the work; all of the work. Standards forums ensure work upholds these standards before it's shown to users (reminder: users can be internal or external, and quality for both is equally important even if the standards manifest differently).

It's critical to be discerning about when in a project's life it comes to a standards forum; focusing on polish too early can be a huge time-waster for teams. For any standards forum, build clear principles and guidelines for what work must come to the forum, when it should come, who the approver is, and how to present the work to the approver. Team, organization, and company leaders should own the creation of the forums and how to interact with them.

Standards reviews can be as lightweight as a ping to a Slack channel (good for copy reviews, for example) or as heavyweight as a meeting with a rotating agenda of projects about to launch (good for product reviews, for example). They can be opt-in (employees know to raise their hand for a review when a project reaches a certain state) or requested (employees are asked to come to review).

This is a place where it's very easy to add bottle-necks and over-process your organization. Start with the things that you care the most about getting right; or conversely, you think could be the most harmful if you get wrong.

Examples: launch review, code review

Typical qualities

Host: company/team leader

Cadence: as needed

Format: depends

Content owner: workstream owner

Escalation/final decision maker/approver: closest leader, appointed standard-bearer

4. Peer Perspectives

Your organization is full of incredible people with a rich diversity of skills, experiences, and perspectives. Peer perspectives mechanisms establish norms to help your people take advantage of that in their work.

These mechanisms also help teams stay focused because inquiries and feedback are consolidated to blocks of time specifically allocated to it.

Examples: office hours, Q&A, dogfooding

Typical forum qualities

Host: project leader

Cadence: as needed

Format: depends

Content owner: workstream owner

Escalation/final decision maker/approver: closest leader

5. Turpentine Checks

Picasso said, "when art critics get together they talk about Form and Structure and Meaning. When artists get together they talk about where you can buy cheap turpentine." Great organizations are obsessed with turpentine.

Turpentine is what is really going on at the one-inch altitude. It's not the generic, cliched, shape of it observed from 10,000 feet. Even the smartest, most thoughtful, best-intentioned people won't get it right without the ground-level perspective and visceral sense of what is.

Still not crystal clear on why turpentine matters? Pixar's research trips are a great example. When making Ratatouille, the entire crew visited restaurant kitchens in Paris to get a feel for them. Ed Catmull credited these trips with the "obsessive specificity" of the kitchen scenes; the sound of clogs on the tiles, how chefs held their arms while chopping, and more. It's why those scenes feel so real when you see them on the silver screen.

Turpentine makes the product and culture better. Getting neck-deep versus ankle-deep into the minds of users and watering holes of the problem space makes the work more rewarding because employees can feel their impact and hone their instincts for what to put into the world.

The entire organization should be posting to and reading from these channels all the time.

Examples: user feedback tune-in, watering hole tune-in, everybody does tickets

Typical forum qualities

Host: project leader

Cadence: ongoing

Format: depends

Content owner: workstream owner

Escalation/final decision maker/approver: closest leader

If you're looking for more examples or are ready to put some of these processes into action, there's a whole lot more on the topic here.

How can we make our company metrics actually useful?

Simply having metrics that look nice on a dashboard may not be enough to generate the impact you want. If your metrics aren't meaningfully changing behavior, they're probably not doing as much for you as they could.

Here are some tips for making them useful:

Choose the right metrics on the company level: There is always, always, always a way to measure your success with a number. Don't cop out on this one. Squishy measurement is better than no measurement. As a gut check, imagine that you can't talk to anyone about how things are going at the company, and you can only look at the metrics. Will you know most of what you need to know?

Make sure all metrics are measured and reported in earnest: I bet there is some customer service leader at Comcast reporting metrics going in all the right directions. Don't do that.

Assign owners for metrics: Ultimately you are responsible for how the company is going, but it could help to assign a leadership owner to a relevant metric. They can also be responsible for understanding why and how these metrics move over time and then reporting on those to a broader group.

Differentiate between observability metrics and action-triggering metrics: Observability metrics give you a sense of how things are going. This might be total revenue or a count of active users. It's the starting place for inquiry into what you can do to inflect them. Action-triggering metrics tell you to do something now. This might be support ticket volume is high or our servers are getting overloaded.

Metrics should waterfall down through the org: Every single employee at every single company was hired to make the company better in a specific way. Help your managers and employees ladder their work up to the company-level metrics.

Make sure all metrics are targeted: If you don't know if or how you want to move the needle on a metric, it's probably not ultimately actionable.

0 targets can be really memorable and motivating, too. 0 outages. 0 breeches. 0 churn. 0 tickets answered in >24 hours.

Create a dashboard for them that populates automatically: If it's a heavy lift to look at these numbers, it's going to be really hard to say on top of them.

Review observability metrics at a set cadence: If you have a leadership meeting, spend the first 10-15 minutes looking at the metrics. This is the start of a conversation about whether something needs to be done to intervene with inertia on a given metric. This is also where your owners can be helpful in reporting what is going on with the metric.

Set up a visible alert system for your action-triggering metrics: maybe this is triggering on call rotations, a ping into a slack channel, or turning a dashboard red and mean looking. These alerts should show up where the team is already looking. No one should have to go fishing. They’re probably more useful on the team-level, but you might want to subscribe to some of these alerts yourself.

Make sure everyone at the company knows what your top-level metrics are: Bonus points if everyone at the company actively stays on top of how these metrics are trending. How? Build a habit of referring to the metrics often. Create a dashboard that anyone can look at (make it nice to look at if you can). Create a Slackbot that auto-updates the company every morning. Do an update on them at every All Hands. Celebrate metrics-based milestones when they're hit. Repetition doesn't spoil the prayer.

What are the minimum requirements for great new employee onboarding?

I don't think it's ever too early to do a truly stellar job on new employee onboarding–it's an enormously precious and impressionable time for your new team members. It's also your best chance at getting a clear-eyed perspective on how your company's operating quirks compare to other organizations.

So, here's what I propose you do to create the the minimum awesome onboarding experience at your company (with suggested owners). You should be able to ~copy/paste this document and turn it into a checklist.

The first step is to have a single owner for onboarding stuff. This doesn't have to be someone's full-time job and they don't have to do all the work, but there should be a single person that is responsible for the overall process and communication about it.

Remember, prescribing a thorough process doesn't have to mean you're "going corporate." It means that you're ushering your new people in to their new home with care and warmth. Who doesn't want that?! Plus, the more you decentralize, the more uneven your new employee experience will be (at a time when you want people to feel particularly connected to the collective).

Prior to arrival (onboarding owner owns)

Have incoming team members send a short bio that explains who they are, how they got to your company, and what they'll be getting up to (have them include a picture, too). Then, send this out to the company a few days before they arrive. That way, they're not surprising anyone when they show up for work.

IT Prep: anything you want to/can set up on their behalf like provisioning laptops, email addresses, etc.

Add them to company events/subscribe them to listservs so they don't miss out

[manager] have the manager send a note that pumps them up and tells them what to expect from onboarding (this should be template-ized by the onboarding owner)

(recommended) welcome gift like employee-specific swag or a giftcard that enables local coffee walks

Company-level onboarding (onboarding owner owns the process, people around the org own the content)

Reading list (any existing artifacts that explain stuff)

IT to-do's checklist: anything you need new team members to set up themselves like tool access, avatars, accounts etc.

Spinup "classes": have at least one dedicated to introductions to 1/the industry 2/the product 3/your users 4/your business and 5/your org structure. Have these "taught" by people from around the organization so they can start to get exposure to their new team members across the organization.

A session on mission, vision, values session with the founder, make it discussion based

"Be a user moment": get them into the product and using it (ex- everyone implements Stripe checkout on their first day)

Engage in some ritual that integrates them into the company (ex- at Figma, everyone contributes a book to the company library)

Something fun (ex- a shared meal)

Team-level (manager owns)

Goal shifts slightly to getting productive as soon as possible

Share Welcome Document that explains what they'll do at your company and why (here's a template, you'll see that it's got lots of soul)

List of people to meet and why (can be internal and external, offer to help with outreach when/if it makes sense)

(if the team is large enough) Connect them with their spinup buddy, a person that can be another go-to for questions (probably a peer, probably someone they'll work closely with)

Spinup project: goal is to get them so ship something as soon as possible, however small. Then, help them tell the rest of the company about is so they can be celebrated!

after 30 days (new teammate owns)

write a "first impressions" doc and allow the whole company to read it (managers and founders will be particularly curious)

(nice to have) new employee writes 30-60-90 day plan/role charter for themselves and share it with their manager (here's a template)

(nice-to-have) manager also writes "first impressions doc" about new employee as an early review to make sure they are on the right track

Et voila!

Make new employee onboarding great

It's hard to over-invest in onboarding–at high growth companies, your newbies start outnumbering your oldies pret-ty quickly. Here are some principles and tactics to consider if you want to make onboarding really, really great.

The right owner for the whole thing: It should be a single person's job whose mission is to make this Disneyland-level amazing and tell them so. Like many things, if the responsibility for greatness is split too many ways, the results will be diluted.

A steady drumbeat of leader reminders that it's business-critical to do a great job: Your existing team has a ton of stuff going on. It's going to feel like a low priority to go on a coffee walk with some rando that just showed up on Slack. It's going to feel like a time suck to take the extra 30 minutes to walk the new team member through using this bespoke tool that feels super obvious after using it for the the last year. But, everyone's gotta do it! And leaders can remind them about why, proactively. How? Show how excited you are for the new start class by reacting on Slack/email. Spotlight the great work the onboarding team is doing. Do a QBR on it and publish notes to the team. Give feedback to a team member that the most awesome thing they did that week wasn't ship that thing, but rather getting super hands on with their new team member to show them the ropes.

A deeper conversation about values: One critical part of onboarding is showing new hires the culture of their new home, and helping them integrate into it. One thing companies often forget is that everyone is coming with their own scar tissue from past experiences–you may have had a great experience with direct feedback, but a new team member might have had a screamer of a boss once upon a time. Facilitate a deeper conversation about the values and what hits their ear funny on first impression. It will get vulnerable, but that's the point.

Go high on personality and soul in your spinups: So, all the content is being delivered to get your new teammates spun up on the industry, product, users, business, and org structure. But, is it compelling? Do people like consuming it? Does it feel like you? Does it reflect what your company values? I'd recommend regular audits of the content to make sure it's up to snuff. One way to do this in a scalable way is to record sessions (you can even delete them after some time period) or have leaders from the company drop in from time-to-time (give facilitators a heads up!).

Rotating spin-up facilitators at a regular cadence: This will create a baked-in experiment in content and delivery. When you ask your new teammates about their favorite sessions/how they'd rank, you'll start to see trends in what actually works.

Get your newbies to ship something ASAP: big or small, a ship's a ship. And this boost of confidence and productivity is so important early on.

Manager feedback loop: Are your people getting integrated into the company culture and up to speed fast enough? What's missing from company-wide onboarding? What's missing from team onboarding? Where does that information go? Many teams have a "how'd this go?" survey for new employees post onboarding, but I'd recommend having one for managers too.

Cohorts at a set cadence: Have lots of people start on the same day to the extent possible. (Even if it means someone starts two weeks later). It's a much better new hire experience and you'll probably get those two weeks of efficiency back down the road. Beyond that, this program takes a ton of work. Batching them makes it more likely that your owners, facilitators, and spinup buddies can keep the energy up.

Raising red flags: The hiring process doesn't get it right every time and your flavor on onboarding might not suit everyone. How do you keep tabs on who might be flailing early on? And, what do you do to support them? Many teams have some way for employees to document their first impressions of their new organization, but I'd encourage managers to do this, too. Then, it can serve as a low-stakes performance review of sorts where the only goal is to get them the support they need (or, help them move on as quickly as possible before really investing). And remember, this isn't a punishment, it's just a way to get some extra help. In my days playing competitive soccer, if you failed the pre-season fitness test, you had an extra fitness session added to the practice regiment before breakfast (we called it "breakfast club," and it honestly had it's own camaraderie since we were all working extra hard to better the team).

The 10x spinup buddy: Some people are real naturals at being a spinup buddy. These are probably your empaths/the one's that love organizing team fun. It's going to be tempting to rotate buddies around the team for fairnesses sake, but do yourself a favor. If you've got a 10x spinup buddy on your team, make it some explicit part of their job and sic them on all your new hires!

Be in constant conversation with new team members: it's hard to pipe up and ask for things, especially in a new environment where you want to look extremely competent. Have people constantly asking, proactively, how things are going. And, have escalation paths for any white flags (likely directly to the manager). This can be some combination of spinup buddies, manager, and anyone else they casually meet around the company.

First Impression Doc Changelog: It's easy to forget people are new when there are even newer people starting. 3-4 months in, have still-new employees publish a changelog on their first impressions doc and share it with their managers to get a sense of how things are progressing. If you want this one to be a bit more prescriptive, provide a template for some questions to muse on.

Then, run a group retrospective: Have cohorts get back together ~6 month mark for a retrospective on the onboarding program. They may have some great ideas for you while they're still relatively green but have the benefit of onboarding being in the rearview a bit. Also, it's always just fun to get the (likely very crossfunctional) crew back together.

More ritual: facilitate a spiritual connection to each other and the organization. Make this unique to you!

(idea) Interview feedback reminder: I've had a hunch that interview feedback might have some clues in it about what support employees might need when getting started at their new company. Starting at a new company should be a clean slate, but it might be helpful for the manager to revisit interview feedback to look out for any places she may need to lend some extra help. Either way, it might clue you in to what's working and not about your interview questions/process!

Psst. Full onboarding 101 checklist in the paid version here.

I want to facilitate a culture of writing at my company. Where should I start?

This is one of my favorite questions! I've found that companies that write a lot are not only higher performing, but also more satisfying for people to work in. It's also particularly helpful now for remote or hybrid teams.

Here's how you can get started instilling that culture:

Tell your employees so! This seems obvious, but I'll say it any way. Announce this in All Hands. Remind them in meetings. Ask for things in writing.

Show them: If you want your employees to write, you should write. One nice place to start is addressing the company with some personal memo. Some founders do "sunday notes." Others have an email list anyone can subscribe to where they send their musings. These notes can be on anything! The important thing is that you are spotlighting the written format.

Generate templates for documents you want to see: This could be anything from a retrospective to a product brief to a "state of the work" document. By providing templates, you'll show the org what writing you want to see and help grease the wheels for more writing to happen.

Specifically, planning/Business Review documents: you can get all team leaders to produce a written artifact of forward-looking plans and/or backward-looking business reviews on progress and then publishing them to the company. I'd recommend creating a template for every team to use so that any reader (including company leaders) can compare apples to apples and encouraging them to be in prose. (I like Amazon's approach of having teams write mock press releases of what they want to happen or what will happen). This will get people not only in the mindset of writing, but also to start seeing the value of publishing shared knowledge into the company.

Creating a voice and tone guide: If writing is a real area of focus, something the company might benefit from is a voice and tone guide. Here's an example from Monzo. There's value in not only the artifact, but also in working with the team to put it together. The discussions around style and brand inevitably tug on the "who we are and what we value" strings which always brings a deeper thinking and meaning to the work.

Identifying some "red pens": "Red pens" are members of your team that anyone can go to for feedback on writing. This group can either be appointed or trained up, but I'd bias towards the former to start, and consider having that team design the training for future red pens. This group shouldn't be limited to people that have writing in their official job title, but they should all be great wordsmiths and upholders of the company tone. The more functionally diverse this group is, the better positioned the group will be to serve the many, many things your company will write about.

Working with this group can be opt-in or required. Taking the feedback can be optional or highly encouraged. The scope of this group can expand to approvals, too.

Make sure the program is formalized and explained to their org and that you and their manager is okay with them taking some of their time. (And, if you are not okay with them taking time, ask yourself whether you care about writing as much as you think you do.”

Writing Office Hours: Schedule standing time on the calendar that anyone around the company can bring writing to–product copy, website copy, customer emails, internal comms, you name it, to “red pens.” Team members sign up for a slot when they have something to review and we do some live editing together. As we chatted about, I like this model because it not only gets the writing into a better place, but also helps the feedback recipient become a better writer!

It might be interesting to do this with 2-3 different editors at the same time so 1/ there is more overall time allocated to this work and 2/team members are more likely to find a fit style-wise.

Don’t just hire a writer and expect them to own the culture of writing: It won’t work and it'll make that person miserable.

A non-exhaustive list of my favorite things about working at companies with a culture of writing

Have you ever had the feeling you know a thing inside out, but then as soon as it comes time to talk about that thing in a meeting, the words come out all wrong? I have. In those moments it can be hard to tell whether the gap in clarity is in the idea itself or the communication of it. But the truth is, in the work context, it doesn't matter. When you codify ideas in a piece of writing, you also codify your thinking.

Paul Graham on the topic: "Writing about something, even something you know well, usually shows you that you didn't know it as well as you thought. Putting ideas into words is a severe test." Still not convinced? Here's some more: "You can know a great deal about something without writing about it. Can you ever know so much that you wouldn't learn more from trying to explain what you know? I don't think so."

Raises the quality bar: When you open up your work to a broader audience, you naturally do more polishing before you share. When everyone is doing that work for each other, the average for the company goes way up!

Writing is democratic. anyone with an insight or idea can write it down regardless of status or access. And, anyone can read it, regardless of status or access.

Scales everyone's knowledge: think about how many people you interact with on a given work day. I'm talking about the real human to human kind where you relay your ideas to others. It's probably in the 5-20 range. If you put those same ideas into a doc or an email, your distribution goes to infinity. Anyone can read it.

Good ideas bubble up: If the ideas are compelling, they will spread. And it doesn't necessarily matter who wrote it. I've seen documents written in a corner of an organization make their way all the way to the CEO and meaningfully influence top-level decisions.

Less political orgs: I've found that the companies without a culture of writing are the most political. Take it from the king of healthy organizational dynamics, Succession's Kendall Roy. "Words are just, what? Nothing. Complicated air flow." Without meeting notes and documentation, companies become reliant on unreliable verbal accounts, 1:1 updates, and needing to be in the room to get things done.

Practitioners set the record: with writing and documentation, everyone has more control over the way their work is represented to others. No one has to rely on other people (particularly managers), saying it for them. Not even a simple message can survive a game of telephone. Plus, it's usually more fun and interesting to read than "rolled up summaries."

Writing supplants meetings: When there is good documentation around a meeting (briefs, meeting notes, etc.), meetings can be leaner and more productive because people don't have to be in the room to know what's happening. So, only those who are actively contributing to the discussion need to attend.

Team players succeed: writing takes time and care. Doing it shows that a willingness to take time to invest in sharing context and knowledge with others around the company. Those who do are regarded, and often rewarded, accordingly.

More backlinks to you and your work: Being the teammate that contributes to the system of knowledge shared shows how much you care about the success of the organization. And, it does it in a way that helps you have more documented and attributable credibility for the value you create within your organization.

Reading as a job perk: Startup whisperer Patio11 calls access to the library of documents "his favorite job perk"! In the time you normally spend scanning Twitter, you learn a whole heap from your brilliant colleagues about the work they are doing right next door. You can feed your curiosity and level up, for "free," by diving in deep on anything anyone at your company, around any corner, is working on.

It helps connect you to people you might not encounter otherwise: Whether it's about the work itself, or just your interests/personality, writing a lot put you on the radar of a new set of people.

Ditch the "roadshows": Publish a document to get your ideas out there and it not only democratizes it, it saves time! Docs create a single destination/artifact for anyone around the org to reference and opine on when appropriate or required. I like to call this the 'YO, FYI" approach. Draft your doc and blast it out with the simple message of 'YO, FYI" to those that may want to know.

Psst. If you're looking for tactical steps on how to instill this at your company, check out the paid version here.

How can we facilitate more remote-friendly cross-team pollination outside of the work?

I'm hearing this question a lot! I've written about a whole heap of ideas here and some tactics that I'd draw your attention below.

As with anything, it's going to take some concerted effort to get these going and keep them going. I'd recommend partnering with and/or tapping some high-performing ICs and/or culture carriers to take this baton (and some budget to do it).

Space to teach each other (ex- Lunch and Learns, Reading Groups, an Internal Blog, Lightning Talks, etc.). The Replit does these every week–they call them FISH talks, and the meaning of the acronym is always shifting in silly ways.

Team lunch: give everyone $25 to order a meal/snack and in return they have to come hang out on a group Zoom. I’ve seen some companies have someone host games/trivia during these. Another alt of this is to have everyone buy the ingredients and then follow a recipe together on Zoom.

Celebrate a company milestone in a special way together: At Stripe, for the company's birthday, we would all share a cake that was inscribed with one of our most popular operating principles–"we haven't won yet." Had to stay humble, even while eating cake!

Inviting inspiration in: Bring in someone you admire to talk to the company. Maybe have a small handful of people join for a breakout discussion or meal in a smaller group.

Make a bet: we'll do x when we hit y metric kinda thing, make x really wacky and silly. Behance founder (and vegan), Scott Belsky made a bet with his team that if they got 100k members, he would eat meat a bite of meat off their forks (he did!). Canva CTO said he wouldn’t cut his hair until they launched real-time collaboration. He went 8-years without a haircut, but eventually got there.

Sharing Life Stories: help your colleagues (at Stripe we called it 'Storytime' and at Figma we called it '3 Things')

Shareholder letter: write an earnest note to the company about how you think things are going. Jeff Bezos's Letters to Amazon shareholders are always iconic (and, always include a link to their first one from 1997 to remind the team of the company's starting blocks).

I’ve completely lost track of what’s going on at my company. How can I get on top of things without jamming my calendar with 1:1’s?

This is a super common challenge that comes with transitioning from building a product to building a company. A few ideas for things that can help!

Snippets!

One thing I'm a huge fan of is getting the whole company on some cadence of publishing snippets to the rest of the company. I love it because it allows employees to self-report on what they're doing (less telephone!) and you (and anyone else) to poke around artifacts of that instead of asking around (even less telephone!). It also cuts down on this mind numbing "'round the horn updates" in team meetings across the org.

Here are some templates for different formats for those. If you don't think *everyone* needs to do it, maybe just some levels of managers?

How this looks at a couple companies:

Alan (which has an awesome and very opinionated company culture btw!) does weekly snippets on Tuesdays. Everyone at the company posts progress on last week's plans and what they're up to this week. They'll often tag in other people, too, so you start to see a network of who is interacting.

Stripe did 5:15s for everyone on the leadership team for a while. I was a really good way for employees to see what leaders were prioritizing on a given week which, in turn, helps everyone internalize the company priorities a lot better. (And, maybe remove some of the burden on all hands for that kind of stuff.)

Another company I'm working does PPP's (progress, problems, plans). Everyone writes them, but managers collect and summarize across teams and feeds them into their manager. Then, every week in leadership meeting, org leaders report in on theirs. Conversation typically steers towards problems because those are often the things the leaders need each other's help unblocking.

Business Reviews at a set cadence

You can get all org leaders to produce a written artifact of business reviews on progress in their organization at some cadence that works for you (monthly? quarterly?). Them, publishing them to the company where everyone can read them. I'd recommend creating a template for every team to use so that any reader (including company leaders) can compare apples to apples.

Template for that here.

Other company review mechanisms

I think one of the the most impactful things founders can do for their companies is defining a clear operating rhythm that paves the way for work to get done efficiently, and for the right stuff to get in front of you at the right time. (No one wants to do it the wrong way! So, show everyone the right way!). Some forums will probably happen at a set cadence (like your leadership meeting or business reviews) and some will be event-triggered (like reviewing launch materials or a pitch to a big user). We'd come up with the rules for engagement and any "templates" that forum attendees can rely on. You can come up with the rules for engagement and any "templates" that forum attendees can rely on.

See some examples of the kinds of forums I'm talking about and what details we'd want to build out with them here.

And, even more forums to consider here: This should be considered the superset of options, the magic is implementing the right ones at the right times, your way.

There’s a bunch of random stuff going on that’s important for the company but doesn't neatly fit into a single team’s charter. What should we do?

I think assembling a team of hard-working, whip-smart generalists that are ready to be sprung onto any job is one the secrets to a nimble org. This way, you don’t have to be *sure* something will work before you staff it, or wait to hire someone which takes way too long. Stripe solved this with their Business Operations team (this was my team at Stripe and I absolutely loved it).

BizOps can take on a lot of different flavors and sit in a lot of different places, but the charter of Stripe’s BizOps team was to pick up work that was high-priority but didn’t fit neatly into another team’s charter. I can see this working very well at most companies. All of our work was framed as a project that lasted between 1 and 6 months (including clear exit criteria). When the project ended, it could go one of the following ways: 1/workstream entirely closed out 2/deprecated 3/folded into an existing team’s work (this is how I ended up running Stripe Press) 4/staffed as a new team (sometimes existing team members, sometimes new hires).

I also think a team like this can be a great recruiting and retention tool. Know of a super smart person that wants to work at your company, but don’t know what they want to do or doesn’t neatly map to an open role right now? Send them to BizOps. Have a talented person at the company who is getting itchy in their current role and doesn't know what to do next, but you want to keep them at the company? Have them do a rotation onto BizOps to explore? Fun fact: no one who was on Stripe’s BizOps team left the company for the first four years of its existence. Many people who started on BizOps ended up jumping on to other teams instead of departing.

Any ideas for a lightweight talent review process?

Many founders I work with are terrified of the performance review process. I understand. While everyone's on the same page about the importance of feedback, spending the entire company's time getting this right (from the content of the reviews themselves to the meta-process around collecting and delivering them) feels like a heavy lift. And, the cost of getting it wrong is incredibly high–conversations around performance are emotional and therefore scary for everyone involved. There are trip wires everywhere–inexperienced managers, exposure to comp reviews, and the inevitable exposure of the fact that priorities and expectations for your dear, hard-working, employees may not have been as clear at the outset as they should have been. Beyond that, it's a really easy thing for employees to point to and say (probably through gritted teeth) "wow, we're really starting to act like a Big Company, huh?!"

You are not alone. But that doesn't mean you should avoid this critical process for your company. So, instead of thinking it as some corporate must-do, think of it as a vehicle for helping individual team members flourish. And, a way for your company to build its operational muscle and comfort with the right kind of process.

So with that, here are some ideas for your early lightweight review process:

Brag docs: Ask every team member to write a "brag doc" for the performance cycle. (Julia Evans wrote about them here). That way, every team member has a chance to share with the org the stuff they're proud of, and everyone who is reviewing their work has a primer on all the great stuff they did.

For 360 feedback, run a survey: Here are some questions I like.

What could this person **continue** doing to keep your throughput/working relationship humming?

What could this person **stop** doing to make your throughput/working relationship 10x better?

"what wouldn't have been possible without this person's contributions over the last 6 months?"

"what changes could this person make that would help them make more impact?"

what would the champions with a front row seat to this person's work say?

what would thoughtful and reasonable critics say about this person?

Or, try T3/B3's: This is borrowed from Uber stands for Top 3 /Bottom 3. It's just a simple doc where reviewers share top and bottom qualities of experience working with this person.

And, a few other tips/thoughts:

Centralize the timing: have the whole company be on the same page about these (otherwise they'll be running in the background all year long), and make sure it doesn't coincide with other all-company motions like planning or holidays

Managers own this for their teams: but there should be an overall process DRI checking in

Everyone should be reviewed by managers and peers: limit peers to ~3. (That way, you get enough color, but there's less collective time spend writing these). Make sure they are people that are actually familiar with their work, not just coffee walk buddies.

Managers should be reviewed by all of their team members: upward feedback is arguably even more important than downward feedback, but it is often overlooked

Employee vs org: As an addendum to the brag doc, I like to ask my team members where they felt limited by their own abilities and where they feel the organization blocked them from succeeding. This is incredibly rich information for not only how to help them grow and deliver more impact, but also about what's hard about operating in your particular organization. As their manager, you may disagree with their assessment, and that will become a very important part of the review and career conversation.

(wacky idea) Let people raise hand to review someone, even if they weren't selected: It doesn't have to count towards their 3, but it does allow others to chime in if they want. You can make that double opt-in.

Managers collate peer review feedback into themes: That way, the team member has help making sense of patterns across all the feedback.

Sharing raw notes from colleagues vs just key themes: I'm partial to sharing raw notes, but it really does work both ways.

Don't make these anonymous: it sends the completely wrong signal. But, savvy managers may read between the lines that there is something unsaid. If that's the case, follow up.

Deliver the artifact of the feedback, then have a conversation about it: That way, the person on the other end has time to prepare.

Follow performance conversation with a career conversation: To help turn their review into actionable goals. Where do they want to go? How can you help them get there?

Tying this to compensation: there are mixed opinions about this, and I'd recommend finding an HR expert to help.

9-box grid, disaggregating slope and intercept: I think these often get jumbled up, and the review process can be less friendly to high-potential people who need some extra coaching/hand-holding, but you are optimistic about their trajectory in your org. In order to help crisp that up, the 9 box grid pictured below can be a helpful framework (we used it at Figma).

Talent agency vs marines: It might be interesting to try to label your org talent agency (only picks stars) vs marines (will take anyone and train them up to our standards). Of course, every organization is in between, but treating this like a binary state will help you review (and hire!) more effectively for your company and your stage.

Staying Close To Your Users with Turpentine Checks

Picasso said, “when art critics get together they talk about Form and Structure and Meaning. When artists get together they talk about where you can buy cheap turpentine.” Great organizations are obsessed with turpentine[0].

Turpentine is what is really going on at the one-inch altitude. It’s not the generic, clichéed, shape of it observed from 10,000 feet. Even the smartest, most thoughtful, best-intentioned people won’t get it right without the ground-level perspective and visceral sense of what is.

Still not crystal clear on why turpentine matters? Pixar’s research trips are a great example. When making Ratatouille, the entire crew visited restaurant kitchens in Paris to get a feel for them. Ed Catmull credited these trips with the “obsessive specificity” of the kitchen scenes; the sound of clogs on the tiles, how chefs held their arms while chopping, and more. It’s why those scenes feel so real when you see them on the silver screen.

Turpentine makes the product and culture better. Getting neck-deep versus ankle-deep into the minds of users and watering holes of the problem space makes the work more rewarding because employees can feel their impact and hone their instincts for what to put into the world.

Here are some ways to get your organization turpentine-obsessed.

Feedback Tune-In

Create a space, like a Slack channel or shared doc, where you and your colleagues, can post raw feedback from users. Strive to provide raw feedback over summaries/translations of feedback as much as possible—screenshots of reviews, emails, comments in forums. This will help everyone build better instincts for how your user base communicates their feedback, and reduces the chance of anything getting lost in translation. You can also include feedback from aspiring users.

This channel should not be a “responses required” channel. It’s just an FYI!

Some examples:

Figma has Slack channels called #tweets-about-figma and #blogs-about-figma where anyone at the company can post what people are saying on the internet about the product or company. Nearly everyone at the company actively checks this channel.

At Stripe, one of the organization’s most prolific User Operations team members would consolidate “user notes,” organized by themes of feedback/requests, and send them out to the company at the end of every week.

At Matter, the team produces a “User Voice” summary every week that includes: relevant tweets (about the company or competitors), bugs reported (organized by theme), feature requests, and any comments/questions from power users/high priority users

Watering Hole Tune-In

Meet your users where they are, beyond when they are coming to you. Peruse places where you users spend their time when they're not using your product or services. Watering holes can be digital or physical spaces. Consider anything from HackerNews to Game Developers Conference (GDC) a watering hole. When the time is right, maybe even make your presence known.

An alternative framing for this is "research trips," where team members go explore the in's and out's of a user's experience. When you go, play the role of a journalist more than the role of a company representative. These can require time and money so make sure the tradeoffs for what you learn will be worth it.

The benefit is that you will participate in public discourse in a generative, authentic, way. It's always good for business when a user posts a feature idea on Twitter and the PM for that product area responds.

Some examples:

Tom Preston, GitHub cofounder, used to go to a lot of Ruby meetups. His words "while the talks were generally high quality, my favorite part was always going to the bar afterwards and talking with fellow coders about what got them excited." As GitHub built their community, they created GitHub Drinkups.

CEO of Front, Mathilde Collin, learned that many prospective users that were leaking out of their marketing funnel were trucking companies. So, she started going to trucking conferences to learn more about the space, build literacy on the problems trucking organizations were facing, and learn the vocabulary to use in sales conversations.

Do support tickets

There's no better way to get a sense of how your users are doing than doing tickets. It's also a great way to see a fuller spectrum of users and their inquiries. You can also create a system where everyone does these from time to time.

If there are high-ticket-volume times (like holidays for e-commerce companies, or a breakage causing higher-than-normal inbound), your extra hands may be particularly welcome. Getting in the trenches together and helping each other out is always a great way to build more meaningful connections.

Some examples:

At Bloomberg, new hires do support tickets for a whole year before going into their roles.

The Warby Customer Connection program ensures team members from every department (including leaders) take shifts in Warby Parker's retail locations.

A Dashboard Visible to Everyone

Visualizing metrics on dashboards can make the trends not only understood, but also felt.

These are especially helpful when there is something someone at the company can do immediately to alter the trajectory (user ops tickets, risk reviews, critical services). Create a visual cue to signal a metric slipping past an acceptable value (ie-turn the dashboard red when the support ticket queue is too high) or make something special happen.

Some examples:

At Stripe, we had a 'users having a bad day' dashboard (that pulled from events like API downtime, slow load times, chargebacks, and lots of other things we knew that gave users a bad time).

For one Hackathon project at Stripe, my buddies Everett, Mikito, and I hooked some LED lights to an Arduino, and made things light up every time a new user signed up for Stripe. We color-coded based on geographic region, and it made our geo skew felt, not just understood.

Pick A User (and keep an eye on them)

Pick out a specific user in your user base that you have some connection to for some reason. Maybe their business aligns with your interests. Maybe you find the space compelling. If the user is a company, maybe you think the founder is cool. In any case, when there are big changes or updates or product launches, whether you're working on it or just observing, you can imagine how this might impact "your user." It's a great way to make things feel more real, and facilitate more empathy. Considering how a real person would experience something, instead of some generic or distant persona, can be a powerful force. You can, but don't have to, make any direct contact with them.

You can encourage everyone on the team to pick one, too.

[0] For more on this topic, here's a favorite Ribbon Farm read.

Easy ways to be kind to colleagues

Being kind will make you happier and other people happier, too. I think we all know what kindness looks like, but here are some easy things you can do to show it.

Say thank you if someone helps you.

Before a meeting gets started, chit chat with the other people in the room instead of busily clacking away on your laptop.

Remember things about people. Their kid's names. What they said they were doing this weekend. What book they're reading. Bring them up in conversation.

Acknowledge and/or engage with great work that others have done (ex- reply to their email and say "how interesting! What was your methodology for that experiment? I'd love to replicate it with my team," or "great email," or "nice work! So glad you're working on this!"

When someone makes a mistake with something that seems obvious to you, or struggles with something that seems easy for you, help them. Do it warmly.

Ping someone if you notice they did something kind for someone else. ("Hey, I noticed you picked up those empty cans from the meeting room once everyone left and I thought it was really kind. Thanks for helping to keep our office space a place we are proud of!)

Say sorry if you did something you are sorry for (ex- "sorry if I snapped in that meeting. I didn't get a great night's sleep and I'm a little crankier than normal.")

Check in with colleagues that you don't interact with everyday. "I was thinking of you today. How are things going?"

On occasion, share silly or interesting (work or non-work related) things directly with others you think would find it silly or interesting too ("my pug was snoring like a monster last night (video attached). Hope your pug slumbers more quietly!)

Do common good tasks like answering random Slack messages in your team channel, helping order the team lunch, organizing team fun, closing an open refrigerator, or tidying a common space.

If someone seems down, ask how they are doing.

For the office:

Make eye contact with others, smile, and even make small talk when you pass by them in the halls or stand next to them in the elevator or lunch line

Say hello to the people at the desks near you when you arrive at your desk, and goodbye when you are leaving. (Same can be true for Slack channels, too).

Be especially kind to any office staff (cleaners, cooks, etc.). Acknowledge them warmly by selling hello, and thank you.

Note: I know many great colleagues who aren't necessarily nice in these specific ways. Still, I think they would be *even better* to work with if they were nice in these ways.

How do I wrangle our very chaotic operating rhythm?

The energy is always palpable at high-growth, hard-working, ambitious organizations, and often times that manifests as total chaos.

With the best intentions, I see organizations place the highest value on work output on high volume/speed, when I think they should place more value doing things that are highly efficient/effective. In other words, velocity > speed. On top of that, decision-making is often expected to be ad-hoc and on the fly (happen over Slack and meetings without expectation of any preparation and no clear ownership lines) when they should be principled and considered and inclusive of the right people who are clear on who the owner is.

It's your job as a leader to focus and simplify the way your company runs so that it makes sense to every employee. And I say this with an extremely strong stomach for this stuff. Here are the top 5 things I would roll consider bringing to your company to help. I'm sure you have some version of all of these already, so it's probably about optimizing the system and communicating that out to your team.

1.Clarifying company Plans

Produce a clear vision and priorities (and the workstreams, with owners, that will get you there) for the company. More on how in The Planning Issue of The Kool-Aid Factory.

2. Accountability check-ins where the work comes to you

Leaders can create a series of mechanisms/forums where teams/people are expected to bring information to you for your oversight, guidance, and/or approval. This way, you don't have to go searching.

Organizing these check-ins by theme or moments-in-time instead of allowing your org chart dictate who you meet with will help you ebb and flow with the needs of your company and ensure you get the right people in the room.

This could be anything from program launch plans, to metrics reviews on programs, to decision-making on new programs, etc. Here's the much more substantive version of writing I've done on the topic, in the Shipping Great Work Issue of The Kool-Aid Factory.

You can also commit to publishing notes from these forums into the company to improve transparency in company operations and decision-making.

3. Formal business reviews on all major workstreams

This can be as lightweight as coming up with a template that all org leaders have to fill in and send to you. Here's an example template.

Beyond the content being very helpful for you to see, the act of templatizing will help you and others around the organization look across orgs with consistency, it will be a great forcing function for reflection and signal to the team that you are watching.

We've all been in a review where someone prepares the totally wrong stuff–this is a waste of time and demoralizing for everyone. Having templates isn't micromanging–it's ensuring the review of work is productive for everyone involved.

4. An actually-useful All Hands

Find a high-level structure that works (probably some combination of the following) and stick to it. Assign an owner to this. Process-wise, I think they should be run by a different exec each week and content should go through a fairly rigorous review process by that exec. We can also explore taking down the cadence and supplanting the off-weeks with a "newsletter" of the same structure.

company metrics

company news/asks, delivered by leaders (news = things that will render tomorrow meaningfully different than today, asks = requests for everyone at the company to do something)

work spotlights (chosen by leaders/a designated team member, not by hand raises).

More on un-sucking your all hands in this Founder Fodder post.

5. Clear comms on hiring decisions

Having great comms on who is joining (before they show up), what they will do, and who they will work with can solve for a lot. Nothing says "this company is huge and chaotic" as seeing someone pop into some thread and you have no idea who they are. Here's a templates for welcoming new hires that is helpful to not only the person joining, but also to set expectations with those who may be interacting with them ongoing.

I'm detecting some rumblings that reflect a mistrust in leadership. What should I do?

Trust in leadership and enthusiasm about the company's future is a critical feature of focused and high-performing teams, so it's great that you're hoping to get to the bottom of this feedback.

If these rumblings are a true pulse on employee-wide sentiment, the time to get to work restoring trust and confidence in leadership is now. The good news is, in my experience, often times the clamoring for "more trustworthy leadership" is actually a request for better process and that's a very solvable challenge.

First, validate how well-founded and widespread the sentiment is

Start by asking a small set of employees for more feedback (and decide whether we want to do more listening or jump straight to proactive action)

The key decision is: should the entire organization be brought along in the org improvements process or should a small team just start making changes proactively?

Functionally, this is a decision on whether we want to a- acknowledge the current state in some way and b- run a "listening mechanism" that everyone can participate in around org improvements OR just skip to step 2. Skipping to step 2 is preferred, but if this sentiment has permeated the organization broadly and is at high heat, in order to optimally restore trust you'll need to treat some of this stuff as listening + reacting to feedback versus just proactively making improvements.

Start by:

Lightweight validation of sentiment: Before engaging the broader organization for feedback or preparing any org-wide messaging, I think it would be helpful to get more perspective. I call this "core sampling" and I would recommend that you proactively reach out to a few people one concentric circle out of the core trusted crew with something very tactical like "if there were two things you would change about how we operate, what would they be? if you were to ask someone on another team, what 2 things do you think they would say?" You don't want to lead the witness too much.

Then, depending on feedback, skip this step or add the following: If responses converge on similar themes around not being heard and/or deeper lack of trust in leaders, I would propose:

Heavier-weight feedback on key company players in the form of 360 reviews: Run a formal process of key company players asking for feedback. Responses can be anonymous, but you can select who we want that feedback to be from (this should be a good sample of folks around the org and levels of tenure, all that you trust). Have a neutral owner for running that process (could even be an IC you really, really trust). There's a slightly lighter weight version described in the next section called T3/B3 we can use for something quicker.

Do a 2-day Org Hack: Pixar calls this notes day (blog post about Slack trying their version here, we did one at Stripe shortly after Claire joined as COO, too). I later learned this was mostly a listening mechanism for her. They are super helpful in not only bringing ideas to the surface, but also to show the company that you are listening and prepared to act. I researched this idea deeply for my work on Kool-Aid Factory and my strong recommendation is this is branded as a one-time thing, (non-recurring), about setting the company on a good trajectory. Taking the "org health" temperature too often will cause more thrash (ie- generate more ideas that don't have time to be implemented/see results from and then employees just feel more not listened to and like changes are not working).

(Over time) Reliably executing an employee voice survey and feedback (including upward feedback): I know a lot of people that consider this kind of thing "big company stuff", and in some ways it is, but the big companies use it because it works. You can design a lightweight version of it that feels like you, but should exist and it should be formalized, bi-directional, and inclusive of peer feedback. If you decide to embark on this process, make it a great. A faceless survey will be unsatisfying and a full feedback process could take too long to roll out/capture results from if the org is not in a good place.

Then, you can introduce a handful of processes that help move the company in the right direction

Key decision: which of these do we want to commit to and what work will leaders put on hold to do it?

Whatever you learned from listening, acting on it will require a slowdown and re-focusing on some internal hygiene. I think you'll learn that you should be doing this all the time, no matter what.

More on what those processes could look like here.

How do we fight the navel-gaze?

One thing that was excruciating to do but enormously helpful as an athlete was watching tape. The difference between how it feels to be in the game and what it looks like watching it from the outside is remarkable. This is not to say it looks worse or better (though sometimes that much is clear). It's just to say that it's surprisingly different.

As a company leader, you're responsible for getting your team to hover around the screen to watch tape. The goal is not to temper enthusiasm or jazz everyone up for no reason. It is simply to see things as they really are. In other words, you can help hold a mirror up to the organization.

Here are some ways to do that:

Competitive Intelligence Report: what are your competitors up to?

User Research: What are your users actually saying? (You can pull from tickets, product feedback, Twitter, or other user watering holes).

Shareholder letter: what should your employees, many of which might be shareholders, know about the state and health of the company?

Inspiration: what are people doing truly outstanding work in your ecosystem doing?

Bug smash day: what hangnails are users experiencing? create a unified list (so everyone can see how long it is) and have everyone pick a bug to fix over a day or week (it's more fun to do it at the same time). Here's a recent blog post on Figma's "Quality Week."

Core sampling: if there's a tricky topic on your mind, pick 10 people and ask for their genuine and raw feedback or thoughts on it (users, partners, employees, etc.). It doesn't have to be a big ordeal, but you'll probably learn a lot.

A culture of critiques: have prescribed processes in place for getting work under the microscope. The goal is to help each other see the work at face value. Design teams/designers do this well. (In fact, in design school, critique–getting and giving–is considered its own skill. Here are some examples of what those forums can look like.

March in Founder Fodder Land

Hi! Thanks for following along with Founder Fodder!

I'll keep sending freebies on Wednesdays, but most of the good stuff will be heading to the inboxes of paid subscribers–sharing the headlines here to help you decide whether you want to be one of them. (I hope you do!).

Coming this month

How do we fight the navel-gaze?

I'm detecting some rumblings that reflect a mistrust in leadership. What should I do?

How do we instill a culture of more feedback at our company?

We drafted our operating principles, now what should we do to make sure everyone internalizes them?

How do I wrangle our very chaotic operating rhythm?

How do I balance micromanagement and not having to update my mental model for how work gets done with every person, team, or workstream?

We're thinking of bringing on another company leader. What should I know/be thinking about?

We have a new leader starting. How can we effectively onboard them?

How can our company leaders stay connected/visible to our team as we scale?

How can we make skip-level meetings useful for everyone (and not a huge time suck)?

Any tips for a lightweight review process? I want the feedback to flow without having to implement a whole system or tool.

Our culture needs a sharp turn. What should we do?

Can I have favorites?

And, a smattering of what you missed last month

I've completely lost track of what's going on. How can I get on top of things without jamming my calendar with 1:1's?

How can we facilitate more remote-friendly cross-team pollination outside of the work?

What should our leadership meeting look like?

What are the minimum requirements for great new employee onboarding?

I want to facilitate a culture of writing at my company. Where should I start?

As always, if you've got quirks and quandaries of your own, or just wanna say hey, you know where to find me!

How should we be thinking about titles?

There are now a good number of successful companies that don't have formal titles (e.g. VPs/Senior Directors) for management/leadership roles. Having worked at companies that have operated this way, here are some thoughts I often share about this system... 🧵

— Cristina Cordova (@cjc) August 17, 2021

Miles:

As leadership we should be extremely hesitant on titles this early, for a number of reasons

The title doesn't actually map to responsibilities said title would be associated with. He'd be selling not managing. We need great AEs not a great manager right now. Could he become a team lead in time, sure, but let's give the title when that maps to the responsabilities. Is that a 6 month thing … probably not? Broadly speaking, the first 5-10 reps should all be managed by you before we start adding levels of management. We want to be close to the customers and the flows, in all the account details. We're using that to figure out the motion, the positioning, the competitive responses, the right personas to focus on, the value based selling and issues that inform pricing evolution, how success and supports gets involved, how experts are used etc. A manager in between is another abstraction to all the richness of nuance that informs detail for a strategy that we then add lots of gasoline too. I doubt we're close to that rep count in 6 months, so he's probably a manager in more like 12+ months.

If he needs that title now, I also worry for a few things (A) he doesn't really appreciate the AE work today (B) he wants to get away from that faster than we'll want. If he prizes that it also sends a signal that maybe he doesn't really grok the reality of an early stage startup where his career success is being sharp on figuring out all the complexity and driving early adoption. The career proof points here is the company's success not levels within the company. Being title neutral helps also repel folks who lean towards focus on their own advancement vs. their advancement being the company's advancement.

Titles also create levels vs. in the trenches comraderie. We want more of the later now while we figuring things out, we don't need hierarchies yet. If he has that title, what does that say to the next AE that comes in? They start wondering what the hierarchy is, how their own work maps to that other title etc. vs. we're all the same in this together focused on figuring out the sales motion the company. That's were attention should be, not your level.

Now, could we comp him more than an "AE"? Could he have more comp than the next AE we bring in at the same title? Yea sure. Comp can be different but we still keep flat titles. Could we let him use a title if he leaves us and wants to recruit somewhere? Sure, who cares. But on our team, at this stage, my strong push would be as few levels as possible.

Happy to expound further with more nuance. This is a critical cultural touchstone. I've watched a number of orgs title inflate early and they're always the most politicized orgs that accomplish the least.

Brie for replit

You want your next job to be an obvious resume boost

It's possible that working at a startup like Replit will be the best career decision you ever made (we hope it is!) but there's a lot of work to do if that's going to be true. We find that riding the startup roller coaster gets a whole lot easier if we just focus on our mission and trust the rest will come.

Our company has been receiving more attention for our mission lately, but we've been humming this tune for a long time. Replit started as a side project. Y Combinator turned us down three times. We tried to find a "Real CEO" but no one cared as much as we did. We were reluctant to build a company around it, but we knew that would be the only way to get the work done.

Even though we have many of the trappings of a Real Company, we do everything we can to embrace the spirit of a bunch of people working together to make something great that matters. We're way more focused on the stuff we're building than how our job titles look on LinkedIn. And while we don't have a well-defined corporate ladder to climb, we do support and celebrate each other in shipping things we're wildly proud of and have users that say we've changed their lives.

If you want to lead a huge team, it's going to be a while until we have one. If you want a sure bet, you probably want to look elsewhere. Our most satisfied team members feel the company's success is their success. They put the needs of the organization and the community before their own… even when it's not that fun or glamorous… even when their boss isn't watching. We've got all eyes on our mission.

Gut Checks

- Would you be willing to do something that wasn't your job that contributed to the mission?

- If the company were to fail, and your equity went to zero, but your work directly resulted in millions of new coders, would you wish you never joined the company?

- Do you always want the byline on the blog post?

- Would you be excited about charting your own career path?

- Does changing hats annoy you?

- Is maintenance unsexy?

- Would it annoy you to learn someone used your product "the wrong way"?

I know I have some quirks as a leader. Some I'm working on, some I'm fine with. How do I make that known to my team?

This is really good question–and one that lots of founders I talk to are thinking about. I'd recommend starting by getting crisp on what those things are so that you can speak intelligently to them. Then, produce an artifact that communicates this to your team.

First, getting crisp on your quirks

This might be harder than you think! I'd recommend doing some combination of thinking, journaling, and asking a few people you really trust. Some guiding questions:

I'm a successful leader because of:

I'm a successful leader spite of:

As our company and team evolves, I want to keep:

As our company and team evolves, it will hold us back if I continue:

If I could start doing one thing to make our work and/or working relationships more successful, it would be:

If I could stop doing one thing to make our work and/or working relationships more successful, it would be:

What qualities should I make sure to retain in our work and/or working relationships?

Then, communicating to your team

The most effective way I've seen leaders communicate this to their team in a way that helps the work and working relationships is to create a "working with me" document (also referred to as a user manual or manager manual).

The idea for this document comes from Claire Hughes Johnson, the COO at Stripe (see her "Working with Claire" doc here). When I started working with Claire, this helped me understand her approach and preferences. Here's a link to mine if you want to see another example.

Implicit in the creation and distribution of this document is that others should use it to map their working style to it if they want to most effectively work with and communicate with their leader. So, it's really only company leaders that should be producing these documents and expecting others to rely them.

Still, you should encourage everyone at the company to get familiar with their own working style preferences and quirks–this is ultimately an individual's responsibility but ideally, the performance review process and manager relationship encourages that self-inquiry and helps them reach useful conclusions and detect blindspots.

The default state is meh

Many organizations start out with a strong culture. Everyone at the company has a shared (even if implicit) understanding of what it means to be an exceptional citizen of their organization and obsessively upholds it. But without clear mechanisms for upholding and evolving the culture, it eventually slips away into some milquetoast version of itself and everything the company does begins to skew towards the mostly-inoffensive mean. We all know the tropes.

The work output is good enough to get the job done but it's nothing you want to hang on the proverbial fridge. The company gets hierarchical and teams turn into territories. Success is measured in team size, not impact. The goals of the company are supplanted by the aspirations of the individual. People stop caring about what’s happening outside their personal inbox. The company becomes a better fit for process upholders and box-checkers than great thinkers and builders. Only “sure, lgtm” people thrive and“hmm, what about” people get wrist slaps and annoy their colleagues.

Worst of all, these operating modes are contagious, so once it starts it's really hard to stop. The best talent steers clear and/or departs at the first whiff of this stuff. And, if the company is lucky enough to scale, and especially to scale quickly, the train only speeds faster towards this state. ICK!

In summary, the organizational politics beat out the contents of an idea. And what's scary is that this is the default state, even when there's no malicious intent. (See Alex Komoroske's talk on how organizations are like slime molds for more on why that is). Without a relentless focus on culture, organizations slip into the default state; mostly tolerable to most people.

Your only hope of steering away from this is to build a strong culture of intellectual honesty that everyone upholds. To be specific, you have to establish (and evolve!) the processes and norms that get and keep everyone comfortable with:

Open discourse

Embracing nuance

Egoless debates

Regular feedback

Principled decision-making

Asking “why”

Explaining “why”

Unbiased evaluation of successes and failures

Françoise Brougher(Google, Pinterest) calls it,“care with candor.” Jeff Lawson(Twilio) calls it“no shenanigans.” Patty McCord(Netflix) calls it“honesty”. Boz(Facebook) calls it“antifragile.” Ravi calls it "demanding and supportive."

No matter what you call it, it’s the only way to do it.

How do we keep everyone up-to-date on company news?

There are lots of channels you can leverage to do this and while they each have their own format/purpose, repeating content across all is a good way to ensure stuff sinks in. Repetition doesn't spoil the prayer!

All Hands: No-brainer. That said, it's probably not enough on its own. You can never guarantee everyone is in attendance and paying close attention for a soundbite. Something async and reference-able is probably a better fit for news. But, starting with the announcement in All Hands allows you to do some context-setting, storytelling, and humanizing for any news before it goes into text.

Announcements Chat Channel: Have a channel dedicated to announcements that everyone should be aware of. Most companies do their announcements with their general chat channel, but I think this is a mistake because people probably keep this channel muted to avoid distractions. When you have an explicit announcements channel, the expectation is that everyone is is notified for any new messages (you may want to limit write access to this channel). If you want to keep announcements in your general chat channel, you can also create a 'ding word' (ex- announcement, heads up) and have everyone set up a notification for when that word is used. Then, when someone wants to everyone to be notified, they can use the ding word in their message.

Company digest: This is a great async way to spread the word about stuff. It can also be better than All Hands for things that employees might want to search/reference later like events or people changes or important documents. Here's a template for that. One tip is to create a google group that anyone at the company can forward stuff to if they think it should be included in the digest. This makes the job of the person who sends it out easier by making them more of a reporter/summarizer than reporter. This is where your judgement will come in, though, about what kind of stuff is worthy of the company stage (quality-wise and context-wise). Figma's was called the FigNewton and it was a little piece of joy in the inbox on Monday morning. At Google, when now-activist Claire Stapleton was in charge of internal comms, we would do group readings of her poetic addresses to the company in our pod.

Company Calendar: I think this is an underutilized tactic for keeping people up to-date and on the same page. You can put more than group events and holidays on the calendar. Try adding: meaningful ships, major customers going live, internal deadlines (like performance reviews or submitting the employee voice survey), etc. Have everyone at the company subscribe to it (they can edit their own notification preferences).

How do we instill a culture of more feedback at our company?

Ah, this is one of the most important org virtues so it's great to hear you're thinking more about it. In my experience, it's helpful to think about feedback as a both a process and as a norm. A process might be a product review with a company leader or performance reviews. A norm might be whether people speak up in meetings and what kinds of stuff they might say in what tone.

Processes and norms are mutually reinforcing and company leaders are well-positioned to get the flywheel going because they can 1/dictate company-wide processes and define how employees engage with them and 2/model behavior that others will naturally follow.

In one example I love sharing, at Stripe's annual all-employee gatherings, Patrick (CEO) and Will (then-CFO) sat in chairs across from each other and had a feedback conversation in front of the entire company.

When it comes time to defining what processes you want to establish and norms you want to instill, it's also helpful to consider that feedback might be about the work itself or the people doing the work.

Are you seeing what I'm seeing?! We've got ourselves a 2x2! And here are some tactics to consider for each quadrant.

On the work/feedback as norm

hosting brainstorms

sending materials around for input

asking for thoughts on work

sharing thoughts with colleagues on their work

doing "jam sessions" on work

reminding managers to tell their team members to deliver feedback directly to the source vs carrying it out themselves

On the work/feedback as a process

encouraging retrospectives (and then celebrating and spotlighting them for the rest of the organization)

hosting Q&A for employees and encouraging people to ask questions establishing accountability forums (to evaluate progress on goals)

establishing rudder forums (to make decisions on work)

establishing standards forums (to review work before it launches)

having an "Org Hack"–Pixar calls this Notes Day–where employees can hack on org-facing projects (it's like a Hackathon, but projects are employee-facing not user-facing)

More forum best practices in The Shipping Great Work issue on The Kool-Aid Factory.

On people/feedback as a norm

asking for thoughts on attitude and style

sharing thoughts on attitude and style

holding time in 1:1s to talk about holistic observations and overall performance

writing reviews for employees (don't just skip out on perf!)

On people/feedback as a process

performance reviews

employee voice report

calibrations

The board meeting in your head

When I have to make a decision or judgment about something really thorny, I like to hold a board meeting in my head. Sound like something that might be up your alley? Here's how it works.

Turn every feeling or reaction or perspective into a fully embodied person and let each "person" make their opinions known. This means giving them all a voice (sometimes I take this quite literally) and letting them take the floor for a minute at your imaginary board meeting.

(If you're going to try this, do yourself a favor and grab some good old fashioned pen and paper to do your thinking when you do).

Then ask–what does the optimist say? What does the skeptic say? What does the data monger say? What does the heart-on-the-sleeve say? What does the adrenaline junkie say? What does the financial manager say? What does the play-it-safe say? What does the future you say? What does the nine-year-old version of you say? What does the scientist say? What does the doctor say? What does the teacher say? What does the student say?

Now that you've hosted your board meeting in your head and know what all the other you's say, what do you say?

How do we effectively onboard a new leader?

New leaders are here to change you, which makes new leader onboarding particularly tricky. If you're going to avoid organ rejection on either side, you're going to have to work with your new leader and existing team to bridge the way your company naturally operates today with the new ways you'll company will operate with the support of your new leader.

Even if the content of the work is perfect, if the delivery is not done well, the new leader will fail. Prepare to spend a lot of company time investing in this to ensure they will be successful.

Here's how:

A clearly-defined support system

A Manager: don't forget that new leaders have and need managers, too!

Schedule regular manager 1:1's: probably 1-2 hours 3x/week for the first few weeks.

Appoint an onboarding owner: there should be a single go-to for managing this process for the new leader, an executive/administrative business partner might be a good fit

Appoint an IC go-to: someone to help them navigate the organization and give them the scoop from the employee perspective, this person can also help the onboarding owner organize and facilitate the process

Appoint a peer go-to: non-manager leader that can be a go-to, that leader should be prepared to spend time on this

Prepare a list of people they can ask questions of and seek support from across the organization (this should reflect many levels, functions, and organizations).

Setting integration goals, together

A new leader needs to be considered a leader and valued across the entire company, not just their organization, if they're going to be an impactful leader and decision-maker. Make sure to set goals that reflect:

Integration into team they're leading

Integration into executive team

Integration into company across functions

One of the expectations of a new leader is typically hiring up a team under them and it's important to establish mutual expectations around that. Something tricky about this is that if the new leader is not a fit for any reasons, it's likely that the people they'd be inclined to hire also won't be a fit. So, it’s absolutely critical that the leader establishes their footing as a respected, contributing member of the leadership team before you start opening up any hiring floodgates.

A clear onboarding and integration timeline

Expect it to take at least ~3 months for a new leader to get up to speed, but that it can take up to 6 months. Give new leaders time to be successful.

This is going to require a lot of patience, especially sine the time between an accepted offer and start day can be longer with a leader. But it's worth it.

New leaders should attend any normal company onboarding sessions. A new leader needs this info and having them sit in the same room as everyone else humanizes the new leader, makes them accessible, and signals to the organization how much belief is placed in the onboarding curriculum as is.

As a general guideline, you should expect:

before joining: feel needed/wanted, get pumped to do the work with the team

1st month: meet with team, join company onboarding, start IC project, listen, listen, listen (no one likes when a new leader comes in too hot)

2nd month: integration into executive team and team

3rd month: ownership of team

Meeting people

All other leaders should make dedicated time with the new leader in their first week

Set up time for a leader to meet with new reports–this is a great opportunity for a new leader to casually get to know teammates (maybe a team dinner or individual coffee chats). The team will be very uneasy during this time, a leader spending casual time with the team can ease the team's nerves, don’t waste this time!

Keep a list of people a new leader needs to meet within the first 60 days. These can be IC’s, leaders, other cultural people at the company. For example, is there a very well respected engineer who impacts culture? Have the new leader spend time with them! The more casual chats the better

Another format for this is a more prescriptive “listening tour.” Claire, Stripe's former COO, did one as soon as she joined as a research project of sorts.

Remind the new leader not to wait for people to reach out to them and that they can and should proactively setup time. Their onboarding partner can help.

Leader-specific onboarding

Reading list: send as many document as possible to help them build more organizational context async. Offer to follow up with any questions.

Functional deep-dive: have content experts help walk the new leader through the important parts of the domain from the company's perspective

Team status/Talent Review with HR rep and current manager. This should be a relatively long session where you discuss every person on the team (or at least direct reports and any issues). Gives context for the new leader to understand the health of the team.

An IC-level project

This project is something that can be completed in 2-6 weeks from start to finish. The leader will need to partner with someone currently on the team. It's important to clearly state expectations to the team and new leader that the new leader is completing this project to help the team and learn how the team operates.

This will help your new leader:

Learn the ropes of the company and how to work cross functionally on the team and throughout the company

Prove themselves to the team

Have a good reason to spend collaborative time with teammates right off the bat

Understand the problems facing an IC member of a team

Get a first-hand sense of how the team operates

Communicating to the company

The first 3 months will set the tone for a new leader's time at a company, over-communication is key. New leaders should address the team at a high cadence. Some suggestions for that:

Remember that onboarding already started during the recruiting process in the sense that many people from the team likely already talked with this leader. So, they're not coming in totally cold.

Welcome email, before they start.

Reach out to the team and offer to meet with them before they start.

Saying hi to the company at All Hands

One week in reflections and update on what they are working on and seeing on the team

30 day reflections

90 day reflections

I think it's time to hire another company leader. What should I be thinking about?

You know this already, but hiring a new leader is a big deal for your company and your team. They're going to change you (that's why you're hiring them) and change always hurts, even if it's the good kind. Still, prepare yourself early to figure out how to tell the difference between that and the bad kind.

Things to keep in mind as you get started:

Hiring a new leader takes *a lot* of time. let it.

If you are hiring a new leader, you actively want to change, and change almost always hurts. Prepare yourself and your team to be stretched and a little uncomfortable.

The CEO must be prepared to invest heavily in scoping the role, interviewing, and hiring. Ideally, this is true for other leaders as well.

There may be more than one tier of leader. you can flex this depending on the leader. (CTO vs head of engineering)

Leadership candidates often need confidentiality.

Make sure you are bringing the existing team along in the process. The idea of a new leader can bring a lot of anxiety (strategy changes? job security? company direction? culture shifts?)

Much of the success of a leader is determined before they walk through the door on their first day (did you task them with the right stuff? do they have the right expectation? is the team excited?)

Do not use the hiring process to decide what type of leader you need, you can have those conversions before. This probably requires talking to a lot of industry leaders.

The perfect leader does not exist

In fact, not everyone is going to agree on the criteria for the perfect leader anyway. So, you're not going to hire the perfect leader. Being clear in hiring conversations and decisions about what the gaps are will help you optimally support your new leader once they arrive.

Have a list of non-negotiables and a list of things you can be flexible on

Example of non-negotiables might be: leadership experience, communication style

Examples of negotiables might be: subject expertise (may you're hiring a head of customer support for a real estate company that doesn't come from a real estate background, but has run very high performing support teams in the past)

You’re probably going to choose either a visionary or tactician, be self-aware about which one you are choosing and then make sure there are plans to staff up/support along the other dimension

The job description

Align internally on what type of leader you need before you start the hiring process. What do you want to learn from them? What do you want them to do? Someone to scale a large org? Someone to provide more domain expertise?

Do your best to establish internal this before you start interviewing. Otherwise, your team and any potential leaders in for a lot of pain.

Create some artifact you can point people to. Even if you don’t want to post this on your website for some reason, there should be some tangible, shareable, accessible artifact that people inside and outside of your company can refer to.

Share the JD internally with stakeholders and the team for their feedback

General hiring process

Casual conversation: with recruiter, hiring manager, peer (ie- other leader), crossfunctional partner

Team member conversation: with 1-2 leaders

Formal Interviews: prescriptively designed loop, possible to have a project/assignment

Note: no shortcuts, even if someone is your buddy or your buddy's buddy.

Reference Checks

Reference checks for leaders is really, really, really important

These should be done by the hiring manager not the recruiter

Recommend: manager, peer and a direct report

This is a little odd to ask but speaking to someone who reported directly to the new leader will give you a chance to probe on their leadership style

Use an outside agency?

Using an executive search team is useful to source names but not always needed. Your investors and people in your network are likely better advocates. A ‘Rolodex’ is an outdated concept.

An agency does not know the nuances of your culture or business so the hiring manager (probably the CEO) absolutely must be invested in putting in the time to source the correct candidates

The hiring manager and recruiter should have weekly calls with the outside agency to align on candidate profile and give quick feedback.

Overshare feedback on candidates, the more time invested on the front end the less time you will waste interviewing people who do not fit the profile you want to hire.

Bringing your existing team along

Your number one priority when hiring a new leader should be how they will be a people manager and interact with your current team. Companies need to prioritize people in their company if they want a genuine culture where employees are happy and feel invested. This is overlooked too often.

Show extreme empathy to the current team as you walk through this process. For example, don't make someone getting layered by this new leader responsible for writing the job description or designing interviews.

Share as much hiring scope/criteria as you can with the existing team. These details will help them get on board. Include why are you/aren't you looking to internal people for the role.

Don't just hire friends. But, if you want to/must, you can at least place them against this criteria. And, don't let them sidestep the normal processes.

Interviewing is a great way to expose employees to leaders before they arrive. Having your 'culture carriers' interview may help you get a groundswell of support for a new leader. DO NOT forget to have non-execs interview.

Set the new leader up for success by handling the hiring announcement well internally.

Each of the new leaders' direct reports should meet with the new leader prior to their first day. Even if the leader has already accepted the offer, it helps the new team earn buy in for the leader

Share updates on progress at team meetings without the name of the candidates if you can (ie had x amount of convos, x amount moving to onsite). Share as much clarity without sharing anything sensitive to the leader.

Don't just ask for trust. Earn it.

Companies are always telling their people to default to trust. I think that's a little unfair. Here are some tactics and norms you can set at your company to create a high-trust environment.

On communication and feedback

Evaluating work at face value (Note: those who worked closely with Steve Jobs report that he could tear one piece of your work to shreds and fall in love with another in the same meeting. He was always critiqued the art, not the artist).

Listening actively (ie- making people feel heard)

Caring with candor

Communicating with people directly, instead of through their managers/coworkers or behind their backs

Asking for feedback often and earnestly

Delivering feedback honestly and kindly

Receiving feedback gracefully

Establishing clear escalation paths for things that are broken (product, users, team)

On collaboration

Taking notes in meetings and distributing them broadly

Sending/reading updates proactively and regularly

Canceling meetings and removing process when they don’t serve the work

Striving for planfulness (and letting others know when you deviate from the plan, and why)

Giving credit when it’s due, in specific terms

Embracing the personality and quirks of others

Removing yourself when you’re not needed/contributing actively

Taking time to teach and learn (ideally finding joy in it)

Seeking the perspective of others

On decision-making

Leaning on principles/answering why (consistent decisions will follow)

Internalizing the global priorities of the company

Inviting the right people into the decisions, proactively

Seeking nuance

Debating without ego

Relying on data for answers

Relying on user feedback for answers

Documenting decisions, sending them to stakeholders, and publishing them to the company

On the company stage

Making your connection to company values and operating principles explicit

Communicating about the hard stuff as much as the good stuff

Evaluating work based on impact

Explaining why

Rewarding good citizens

Punishing bad actors (and acknowledging as appropriate to the broader team)

Hiring, paying, and promoting fairly (ideally based on data)

Ensuring anything that's on the company stage is in line with the company's stated values and standards (All Hands, organization-wide Slack messages or emails, company-events)

More on this topic:

Julie Zhou's Twitter Thread on 7 Management Trust Killers (and how to avoid them)

https://thisibelieve.org/essay/92048/

https://boz.com/articles/be-kind

http://www.paulgraham.com/safe.html

http://www.paulgraham.com/mean.html

https://lethain.com/inspection/

We wrote our operating principles. Now what?

The way you roll your operating principles out to the team is as important, maybe even more important, as the content. Here's how to do a great job sharing them with your team and integrating them into all of the work you do.

Share them with the team

Goal: show that you company leaders embrace these operating principles and are prepared to uphold them, request for your team to uphold them with you

Post in Slack/email? All Hands Presentation?

Talking points can include:

Should be both reflective of the best of how we work and aspirational in terms of how we want to work.

Nothing should feel like news.

They are meant to be used in the run of work by everyone.

On timing/why now?: wanted to codify these as the company prepares to grow, new people joining all the time, we want a stable center to grow from

Summary of the process putting them together

They will evolve over time.

The following things are true about each operating principle:

"I believe that striving to do this will make our work better, and ultimately help us succeed"

"This is how I will strive to act when I am working with you"

"I want you to act this way with me when you are working with me"

"When I lose sight of these values, please remind me. I will do the same for you"

Publish them on your company wiki

Goal: give employees time to read/digest, have a reference point ongoing

Design an interview for candidates around these

Goal: hire the people who will enjoy working in today's version of your company

You can design questions around each value

You can remind the candidate that it's likely these will change as the needs of the business changeBW Editorial: This probably isn't the right fit for right now while the team is small, but eventually you can implement something like Amazon's bar raiser program that interviews on these values

Beat the drum about them!

Invoke them and help others invoke them, with the specific words you chose, as often as you can.

Meetings, presentations, chat, etc. Wherever work is happening, these phrases should be used by everyone. And the team will follow the lead of their leaders!

Mark your calendar for 6-12 months from now to revisit these

Goal: make good on your promise to evolve them as the needs of the company evolve

Include a session on these in new hire onboarding

Goal: set expectations right away

These should probably be led by the founder. If that's not possible, another prominent company leader would suffice.

One company I worked with has had a lot of success with doing small discussion with new hires + some tenured employees where new hires can share their gut reactions (including any scar tissue from past jobs) and ask about how these show up in the day-to-day work at your company (ex- "what does magic actually mean?", "do you really honor tension, or are you just saying that?")

Do a dedicated Q&A/group discussion

Goal: create (a time-boxed) space for an open conversation about them, especially useful if you think they will be contentious with existing team members

Have new hires sign them along with their offer letter

Goal: set expectations right awayStripe started doing this about 2 years ago and I believe a16z does this now as well (their values here).

Have a way to collect stories of employees upholding these in spectacular ways, publish them to the company when they are spectacular

Goal: Show how these actually look when the rubber meets the road (especially when it's inconvenient to do so), acknowledge employees who are upholding the company's values and standards (make it an honor to have your work included in the company lore)

If there is one Operating Principle that stands out, create a "pass it on" award for employees to recognize each other for upholding this

Goal: acknowledge employees who are upholding the company's values and standards

At Stripe this was the "golden llama," At Nike this was the "golden shoe"

BW Editorial: I much prefer this to the "link your Lattice praise to a company value" kind of thing

If you want to use these as a way to help non-culture fits move on, give managers a heads up about this goal along with talking points about how to have this difficult conversation

Goal: have a mutually beneficial and supportive way for non-culture fits to exit

BW Editorial: Depending on where/how firm/how targeted the line is on helping people move on, you may want to include a point around this in your overall company messaging and have generous severance packages ready. You also probably want to have a clear escalation path for managers to let you know who in the org is raising their hand as a non-fit. If you are finding the wrong people are opting to go, you may want to revisit the content of your operating principles or messaging around then.

How do I empower leaders to run their teams their way without taking on the burden of getting the updates I need to run the company?

Three words for you; templates, templates, templates!

I know what you're thinking. My team members don't want to fill in boxes. They hate micromanagement and I promised them I wasn't that kind of boss! They want to think big, approach their work with creativity, and act autonomously. That's why I hired them!

But what if I told you that the motivation to do a stellar job is a greater force? And, that they desperately want the support of the organization (and you, specifically) in getting there? And that when faced with the daily realities of meetings, messages, reporting, and documenting, they'd be happy to have a shortcut to a job well done?

So, here's the secret–you can be more prescriptive than you think about how work gets done. If you know what you want to know, why wouldn't you let others know, too?

Think about it like clearing a trail through the woods or putting a crosswalk across a busy street. So long as the path you lay is making the walk more efficient (and ideally more pleasant, too), your team members will be eager to walk down it. They may even start sprinting faster, just because they can.

More benefits of templatiz-ing work

Everyone can be more prepared for their time with you: and, time together can be more efficient and enjoyable. Your team members will never have to walk away from a meeting feeling like they didn't give you what you want.

Lowers the cognitive load and activation energy for everyone to get the work done: a template serves a shortcut to getting to the best stuff quickly, no one has to reinvent the wheel

More objectivity: this is kind of magical but since the template asks questions of/is oriented on the work, not the individual, reviewing the materials feels less personal (trust me, I've seen it!)

Fewer blind spots: plus by pulling information from team members versus having them self-report, you're more likely a more clear-eyed look at the work

Fewer shenanigans: it's harder to hide behind nice prose, cherry-picked datapoints, or a random screenshot

Generates an artifact of work: that those who aren't in the meeting can refere

Reaches everyone in the run of work: company-wide insights, objectives, and focus areas can make their way into the corners of the organization in an action-oriented way, where the work is happening.

Compare workstreams apples-to-apples: knowing how work stacks up compared to other work, is a huge benefit to you and your team.

Easy to evolve: changes to the organization, strategy, or outlook can easily flow through templates. Also, if someone has a great idea for a tweak or addition, the benefits can be extended to everyone leaning on the template.

Generates a strong center of gravity: when everyone at the company is on the same process and programs (so long as they are the good kind!) there is a clearer sense of shared focus and a deeper sense of org-wide connection.

Qualities of good templates

Insight: what do you intimately know? (focus on the non-obvious)

Execution: what is happening to move the needle? (focus on progress, not motion)

Impact: what is the outcome? (focus on what's measurable and observable)

User-focused: who is benefiting from this? how? (focus on specifics, not generalizations or rollups)

Personality and soul: how do we uniquely express ourselves? (just because it's a template, doesn't mean it has to be a snooze)

Open to adjustments: create space for template users to tell you if it's missing something meaningful or creating

What to templatize?

Team/Org Plans or charters

Retrospectives on work completed

Kick-offs

Hiring plans/ideal candidate profiles

Welcoming new hires

More example Kool-Aid Factory Templates that you can use as a starting point here

My foundational beliefs about culture-building

I define company culture as how it feels to get the work done. These are the things I believe about how organizations (and especially leaders) do that.

Belief #1: Company culture should be thought about from the perspective of an employee in the corner of your organization.

This is difficult in practice, especially for company founders or leaders, in particular, because their experience of how things work are skewed. Everyone's default mode is to see things from their own perspective and it takes a lot of work to get closer to the truth. When you think about culture, picture an employee you haven't spent much 1:1 time with lately and how they might be thinking or feeling. Don't know? Just ask!

Belief #2: Culture is reinforced through anything the company does with the audience of itself.

When employees think about company culture, they think about how it feels to get the work done. When companies think about facilitating culture, they gravitate towards tactics that have nothing to do with the work itself (team gatherings, company swag, etc.). The reality is that culture flows through any and all internally-facing mechanisms (ex- your company all hands, your communication norms, your internal comms, the way you review work). This will ooze out into the stuff your users see, but it starts at home.

Belief #3: Company leaders can be much more prescriptive than they think about how their company operates.

Many high-performing, well-intentioned company leaders believe their employees do not want to be told what to do. In my experience and research, people are eager to embrace operational quirks that make things more efficient. Doing things your own special way at your company is a feature, not a bug. Think about it in terms of culture-market fit (with a growing team and user-base operating in a dynamic ecosystem). A unique approach is required to execute well, with your particular team, at your particular company, with your particular users, in your particular industry.

Belief #4: When implemented well, everyone will find the company and their colleagues a source of support in getting what they want.

When you outline what the special way you do things is with clarity and gusto, everyone can lock hands and support each other in doing it that way together. Doing so not only creates meaningful connections across your company, it makes the work better. Why? When employees share a belief that everyone is there to help each other do great work and rely on each other for that support, an incredible flywheel of trust, efficiency, and stellar execution starts spinning.

More (and I mean a lot more) tactics for getting here on The Kool-Aid Factory.

Our culture needs a sharp turn. Where should we start?

My favorite tactic for this is running an "Org Hack." Think of it as a hackathon but for improvements to your company, not your product. It's a great way to show that you're prepared for some breaking changes to culture and want to engage everyone at the company in the process. (This will also help grease the wheels for a rollout of any improvements because you'll already have created some ground-level champions!).

Stripe's COO did one as soon as she joined as a research project/listening tour of sorts. Pixar's famous for theirs, which they called Notes Day. The goal is to encourage everyone collaborate on company-wide edits they want to make at the company level.

You can prescribe the topics or let your team choose and vote. Potential topics could include: communication, collaboration, tools, hiring processes. As a gut check, topics should be things that could potentially touch everyone's work at some point. In other words, org-or-team-specific stuff should be off the table. At the end of the Org Hack, every group should have a forum to publish or share key takeaways from their conversation about the problem statement and their recommendations for the path forward.

As a leader, it's your job to identify the particularly high-priority/high-leverage problems/solutions (keep an eye on what's getting a lot of nods and +1's from your team), and then helping next steps get resourced. You don't have to action everything, but you can't action nothing (otherwise, the whole event will feel like lip-service and a waste of time to the team).

As an example, I'd attribute Stripe's culture of meeting notes to our Org Hack. It was something that ~everyone had passively wanted to do a better job of, but there wasn't any clear or centralized guidance from the company on how. When the working group started digging in, they learned that people were taking notes in meetings and sending them out to attendees, but they weren't being distributed more broadly. So, the working group defined some norms for each team to spin up a slack ground named $teamname-notes that was open for anyone to join. Simply creating the common format and channel for distribution helped clarify where to post notes and where to look for them.

This is also something I help a lot of teams unpack. More on what that looks like here.

What are good ways for leaders to stay connected and visible to the team as we scale?

At great hivemind-y companies, everyone should trust that 1/ the CEO's thinking is not something that they need to be senior enough to have access to and 2/communication flows freely between practitioners and leaders.

The short-answer is over-communication. And, communication should come in the form of proactively sharing information and asking for information. Dialogue is always more meaningful than 'face time.'

Some tactics you can try:

Sending raw thoughts: Share them in a channel where anyone can opt-in to read them. (At Stripe, this was pj-notes, short for Patrick and John notes. I've seen). Your raw thoughts don't necessarily all have to be work-related (stuff you're reading, pictures of your family, etc.). This will help: build up your team's instincts for how to channel you and your vision for the company in their day-to-day work and make everyone feel closer to you as a human.

Note: I see many founders commit to some 'Sunday Notes' cadence in a way that bogs them down. No need to add time pressure to this–send stuff when the spirit moves you! (Your fellow leaders can help keep you accountable).

Sharing snippets: Snippets are a quick snapshot of what you're focused on/what you want others to focus on (ex-things you did, noticed, spent time with, things you punted, spotlighting this thing, shouting out about this person). Publishing these to the company will help democratize the information that runs the company, keep the "he/she/they said" and the politics to a minimum because your decisions, perspectives, and feedback will be documented and reference-able to all, and establish a norm of sharing more across the company for everyone. Templates here.

Publishing notes from leadership/staff meetings: even if it's just the agenda, it will help things feel a lot more transparent! (And, it will help clarify what leadership-level content looks like).

Attending Org/Team meetings: pop in to org or team-level meetings from time to time. You don't have to present anything–it'll be exciting to just have you in the room.

Fly-bys: curious about work a team is doing? Schedule a 'fly by' to drop by a team's proverbial desks and dig in on work together.

Present at company-wide All Hands: make sure you are addressing your teams in these at some set cadence

Skip-level 1:1's: conversations with those reporting to those reporting to you. (more on these soon)

Office hours: Allocate a set time where people can come chat to you.

Q&A: schedule unstructured time for people to ask about things that are on their minds.

Core sampling: something coming up you want some thoughts on? ping a few people and ask! It doesn't have to be a formalized process.

Braintrusts: Convene a group of people to talk about a topic that's on your mind.

Joining employees for meals/activities: just sit down and hang!

Rewarding employees for spectacular accomplishments by time with you: a meal with you is a nice option (can do these in groups).

How can I productively stay involved in work as my team grows?

Ensuring company leaders feel accessible, humble, respected and authoritative at the same time is a big challenge! Staying simultaneously above the fray and in the weeds to make sure the company is running smoothly is a constant battle, but it's one worth being very intentional about. Here are some approaches you can rely on.

Hosting forums

Instead of relying on a series of 1:1's for your updates, rely on a set of well-designed operating forums. These are the key meetings you need to stay abreast of what's going on and make decisions that'll help guide you in the right direction. Design these based on what you want to know!

Each forum can have a core group of attendees/decision-makers, but the guests can rotate as the needs of the company ebb and flow week to week. Some examples of these forums below, and a whole lot more on the topic in the Shipping Great Work Issue of The Kool-Aid Factory here.

Leadership Meeting

Metrics Review

Quarterly Business Review

Deal Review (for hot sales/partnership deals)

Launch Review (for product and go-to-market materials)

Blocked (for things that need a decision from leaders)

If you are pulled into something

Bring work into the forums: if a forum is a good fit for a topic someone brings to you, invite them to discuss it there. No one should live outside the operating rhythm that you designed.

Bias towards group discussions: don’t try and piece together a story via a series of 1:1 accounts, get the group together to discuss

Lean on metrics: let the numbers speak, it’s good hygiene and it always feels less personal

Leverage direct reports: ask them constantly what they need to be successful, support them as fast as you can, don’t say you’ll do things you won’t

Uphold global priorities: leaders are responsible for doing what’s best for the organization overall, and helping their reports understand those tradeoffs

Establish company-wide processes and norms for things you want to preside over: anything that touches every employee should be run by you at some point (pay, tooling, offices, etc.)

When not to get involved:

Assigning credit on projects they don't have enough context one: leaders must stay out of the fray of who is getting credit for a certain project. Managers should care about their direct reports and be aware but if it is not abundantly clear, you should trust that the person presenting the work is the person to receive credit. That said, you can and should be proactively looking out for people who are consistently delivering.

People clashes and gossip: People are not always going to get along, it is important for a leader to stay out of personality differences until absolutely necessary. Managers of employees should handle, involving managers of managers as an escalation point.

Scheduling Tetris/Black Holes: without being a jerk about it, make sure you can always get time when you need it. You shouldn't need to wait a week for a conversation because of calendar blocks. Hire an administrative partner if you need to.

Second-guessing/going behind backs: trust things people tell you at face-value. If you feel like you can't, try to figure out the root cause of the mistrust. Then, engage one of your other mechanisms to get to the bottom of things.

Performance evaluations of people that don't report to you: Performance should not be a time for the executive team to push back on managers but a time for managers to reward their employees. They are closer to the employee and work the employee is producing. If you really disagree, do the fact-finding required to understand what the gaps are.

Are workstyle assessments like Myers-Briggs actually useful?

I'm into them! I know at first blush they can seem a little corporate, but I think they have some unique benefits:

creating a shared language for talking about work styles and preferences

dedicating company time to talking about where these differences make things hum and where they make things clash

(underrated) create a collective sense of how the overall organization leans (ex- wow, we have a lot of introverts!)

If you decide to leverage them, I think it's a nice idea to have the entire company or an entire section of your org (ex- the sales team) do these at the same time. Then, have a shared place where anyone can plot themselves. This will have the added benefit of creating some natural, albeit kind of silly, camaraderie amongst people with shared types. Fun fact, Dropbox rolled out an org-wide personality assessment and then created type-specific swag around it.

Some favorite assessments for the work setting include:

**Predictive Index (Dominance, Extraversion, Patience, Formality, Objectivity)

DiSC (Dominance, influence, Steadiness and Conscientiousness)

SCARF (Status, Autonomy, Relatedness, Fairness)

Personalysis (Red, Yellow, Green, Blue)

Enneagram (1-Perfectionist, 2-Helper, 3-Achiever, etc.)

Myers Brigs (I/E, N/S, F/T, P/J)

Want to make the work great? Ask these questions of it.

Looking at the work at face value:

Four "ayes": Have at least four (ideally discerning) people (ideally with some expertise or take in the outcome) looked at this and agreed it's ship-ready?

Home page test: If my work ended up on our company homepage, would it fit right in? Would I be proud of it? Am I confident others across the company would be too?

The person I admire: If this work got in front of someone I admire (make that person a specific, not generic, person), would I be proud they saw it? Would I be enthusiastic if they assumed the quality of this work representative of the quality of all my work?

Point of view: Does my work have a clear perspective? Does it look at least a little different than other work like it?

User perspective: Can I speak confidently to what the consumer of this work will think or say once it's in their hands?

The quality bar: Am I clear that this work clears or raises the quality bar? And if I'm not, have I asked for clarification on how to get it there?

Papertrails: Where is this documented? If the working group disappeared tomorrow, how would someone else know how to pick the work up?

Building organizational context: Where can the rest of the company go to learn more?

Succession plans: what happens once it ships?

Expert-informed: Who with very deep context or knowledge saw this? What did they say?

Peer-informed: Who outside the core working group looked at this? What did they say?

User/audience-informed; Who from your target audience has tried this or seen this? What did they say?

Data-informed: What did the data say? What would the data dictate?

In the process of getting it here:

Knowing the why: Have we built this from first principles? Have I internalized the why behind the what?

Escalated appropriately: Have we consulted the appropriate decision-maker for any aspects of my work I wasn't sure about?

Dirt under fingernails: Have we gotten into the weeds on this work to make it great? Can discerning consumers tell which corners are polished?

Moving at pace: Can we move things faster? How?

Refusal to be blocked: When things that have impeded my progress or speed on the important aspects of this work, have we been relentless about finding ways around them? Have we done so without making any colleagues unreasonably cranky?

Self-awareness: Do I know what role we play in this work? Do I know how we can and should participate and contribute (or not!) to the current work and its evolution?

Levity: Have we had any fun with this lately? How could we introduce more joy?

Sound decisions: How did we make our decisions? How confident are we? What could we do to increase our conviction?

Surfacing fears, uncertainties, and doubts: What's giving us pause? What isn't working? How would we assuage those feelings?

A few choices: What are the discrete options? Why did we choose one over the other?

Intuition: What does the gut say? Can you figure out why?

Planfulness: How does this fit into our broader goals? Are we doing what we said we'd do?

Bringing others along: How were those impacted by this decision, but not included in making it, informed? Are they excited?

A model for others: Do I believe my attitude and work product is an example for others at the company? Am I proud of how I show up to my interactions with others? Does it reflect the company's standards and values?

I want to bring my team together in person. What should I be thinking about?

I've been helping lots of teams with this over the last 6 month. I've also participated in many good and many bad versions of a company gathering. Here are some ideas for you.

The questions to start with

Before you start planning anything, ask yourself: "what do I want people to leave with?" Write them down and share them.

You're probably going to get some combination of getting work done and spending quality time, but articulating how much of each up front will help guide you in your preparation, planning, and messaging to the team.

Note: If you need a little more convincing that getting together is worth it, just think about the difference between a phone catch-up or a quick meal and a weekend getaway with an old pal. The difference between what comes up in conversation after 12 hours together is totally different that what comes up in the first few hours.

Guiding principles

It's a pep rally! No matter what the specific goals are, you want everyone to have a really, really, really good time.

Fun and useful: When I work with teams on this I always remind them that fun is fun but in the work context fun and useful is really fun!

Co-creation > presentations: Use the time together to actually work together. Facilitate collaborative experiences that get people engaging with each other. Don't just sit people down in front of other people so they can be talked at.

Get % of structured time right: getting this right probably depends a lot on how good your team is at hanging out without any structure. (If your team is fully remote by default or this is a lot of people's first time meeting, I'd advocate for more structure to grease the hangout wheels).

Default opt in vs opt out? are you prescribing how you expect people to spend their time or letting people decide for themselves?

Conscious of work it creates before and after: be aware of how much prep you're asking people to do, and how much work people could go home with.

Meals together: keep the full group together as much as you can around meal time. Set the food spaces up in a way that rewards moving around. Buffets and standing tables and/or multi-phased meals are are great for this. Formal seatings with place cards is not.

On Drinking: this is up to you. Drinking together can be fun, but it also increases the risk for not-so-fun stuff to go down. I've been to many dry offsites that are great! (In the words of Tyler Cowen, "alcohol makes you dumber"). If you do want to serve alcohol, make it obvious you're not there to overdo it (ie- hooting and hollering about the open bar). And, don't serve late at night if there's an early session the next day.

Soul/personal touches: no other company should be able to have an offsite your way. Make it so!

Expectations for existing work: Clarify what can go on pause or slow down.

Remember your 24/7 teams: not everyone has a job they can shut off (user-facing, security, etc.). Be mindful.

Caveat introverts: Socializing all day every day might be too much for some, especially after two years of less socializing. Bake time away from the group for those who need it into the plans. That way, they don't have to miss out on something if they need to do some self-care.

Have an owner: it's hard work and there's a lot of it! Make sure someone owns this and/or gets a budget to bring others on to help them own it.

Team-level breakouts?: depending on the size of your team, this can be very impactful

Menu of work-focused ideas

Make a strategic decision: prep the topic/activity in advance and let attendees know

Answering a question together: what should our top priorities for next year be? how can we bring the team together outside of the work they do more often?

Defining Operating Principles: how do we all aspire to act when working together?

Employee Value Proposition: why should someone work at your company instead of somewhere else?

Guest speaker: have someone come in to share some perspective (who the company heroes are says a lot about the identity of the organization)

Work spotlight/demos: Get great work or work in-progress onto the company stage

Creating some company templates: do we want to design templates to help accelerate everyone's work and reinforce norms? Ex- experiment kickoff, retrospectives, meeting notes

Working sessions: have a block of time dedicated to catching up on work in a group space.

Customer personas: who are our target customers and what is their relative priority?

Competitor battlecards: what should everyone know about the competition

Moonshots: what shouldn't we do but could we? or, what has an >10% chance of succeeding but an opportunity for 10000x upside?

Retrospective: on something org-wide going on, 'stop start continue' is always a nice framing

Roundtable-style discussions on topics: that are important to the org

Something with your product: like a user flow teardown or a bug finding mission

Hit the backlog: of support tickets, bugs, etc. These things are no fun alone but can be really fun together. Make it a competition!

(If you're feeling bold) have two leaders give each other feedback in front of the team: it will send a really clear message about the value of exchanging feedback, even in vulnerable contexts, model the best version of it, and humanize the company. Stripe's CEO and CFO did this at an offsite and it was the highlight of the day for many.

Menu of quality-time-focused ideas

Cooking a meal together: I can't think of a better way to keep up the collaborative spirit and enjoying the fruits of your work together than cooking a meal and eating it together

Alt: make a picnic together: send people out with a budget in small groups to buy shareable things and then come together to munch on them

Moment of gratitude: create a moment for people to say thanks to each other in specific ways

Designing the company's operating rhythm: what centralized forums do we want to review, make decisions, and unblock work?

Time outside together: walks, hikes, exploring

Build a tower/complete a puzzle: Get in groups and do a silly task as a competition.

Complete the prompt: like 'my favorite things since joining,' or 'I'm most looking forward to x,' or 'this year I hope we x'

Something for charity: volunteering together is always a nice touch, especially if the organization is connected to your mission

Trivia: way more fun if there's a trivia master from your team emcee'ing

Games: board games, chess, werewolf, dice, cards etc. this is especially fun after hours.

Personality assessments: these are fun and come structured out of the box

If planning is too high a burden, do an unconference or hackathon!

For an unconference: let you team self-organize once they get there. This entails giving some light guidance on what kinds of sessions someone could consider hosting, creating some public space where people can propose sessions (likely on a calendar/time slot basis), and then have potential attendees vote or show up! Teaching and learning from each other is always a boon to connection!

For a hackathon: let people self-select into groups and build stuff together. They can prep in advance or not (especially if they need materials). Put building stuff for internal use only (ie org improvements) on the table too. Org Hack is another version of this! You can also do this for lower stakes thing like designing posters, company swag, playlists, etc.

Things to get right

Timing: if there are other huge company moments (big launches, perf, board meetings, etc.), don't schedule your offsite around it

Location: ensure the space is conducive to the spirit you want to create

Logistics and physical comfort: there will be a lot of coordination and planning overhead associated with getting these right, but if you don't, it'll distract from the higher goals. This includes the agenda.

Founder address: have some remarks prepared for the team. it's always nice to hear from you and it'll be especially nice in person!

Comms: get people pumped to come!

Swag/goodie bags: if you're going to do this, do a good job. don't give people something crappy to take home. This also takes the most prep time so don't wait.

Time for prep: if you want people to have thoughts of work prepared, give them enough time.

Kickoff: have a way for everyone to come together with intention

Send off: have a nice bye bye ritual that everyone shares in

Collecting memories/photos: create a central place for people to share stuff!

Ask for feedback: survey the team on what was great and what could have gone better for next time (this can be very lightweight/anecdotal)

How can I make room for oddballs and misfit toys without breaking the org?

I think it's extremely cool that you're trying to figure out how to do this. Outside of attracting great talent, I believe this is one of the best ways to keep your organization on its toes and preserve that startup feeling as you grow.

This guidance is probably best applied to organizations >100 people. Before then, no one in your org should really seem like a "misfit."

Some tips for helping them stay satisfied in your organization:

Collect them in a single team: this helps the entire crew have a home and find camaraderie over their quirks, teams should probably have at least 3 people

Special rules of living outside the org, made explicit: you'll probably want to have some documented tradeoffs for "living outside the org" that would make this team unappealing to most (ex-giving up management track).

Get them a "producer": this is an ops-minded person that loves and is loved by creatives whose main charter is to grease the wheels and keep these misfit toys productive and plugged in to the org in the right ways.

Eventually not reporting to you: reporting to you comes with a certain status and you wouldn't want to confuse motivations for joining this merry band of misfits with getting the privilege of reporting to you. The manager can look like a producer-type, since it will be unlikely that they have domain expertise across the entire interdisciplinary team.

Note: A counter-example, Courtland (from IndieHackers, an independently-run company that Stripe acquired) has reported to Patrick the whole time AFAIK. I don't think they spend much time together, though, and they both like it that way.

Do I really have to put referrals from people I trust through recruiting?

Youbetcha! Here's why:

1. Don't set a bad example about relying on your recruiting team. If you don't believe in the recruiters or the recruiting process, why should the rest of the company? (Note: if you don't trust them to do a great job, you should fix that now).

2. Maintaining a global view and single source of truth as to who has spoken to the candidate when. And, you avoid looking sloppy when you tell them to talk to x person they spoke to for an hour already yesterday.

3. You can get more coverage across competencies. And avoid the candidate from having the same conversation in every interview.

4. Get a diversity of perspectives and systematically collect feedback across everyone. You might have a blindspot or be very surprised to learn they may rub some people the wrong way. even if you do hire them, you'll want to get ahead of that feedback.

5. Offloads a lot of the administrative work associated with all of this. Recruiting teams typically have great tools for this that makes them a lot faster than keeping track of all of this in your head.

6. Get the groundswell of support going before they join. The more people they meet and dazzle, the easier it will be to get the team on board when they start. Plus, you can use interviewing potential leaders as a form of recognition for high performers or cultural guideposts.

April in Founder Fodder Land

Hi! Thanks for following along with Founder Fodder! I'm glad you're here.

I'll keep sending freebies on Wednesdays, but most of the good stuff will be heading to the inboxes of paid subscribers–sharing the headlines here to help you decide whether you want to be one of them. (I hope you do!).

A potpourri of what you missed

I want to bring my team together in person. What should I be thinking about?

How can I productively stay involved in work as my team grows?

How do I empower leaders to run their teams their way without taking on the burden of getting the updates I need to run the company?

I think it's time to hire another company leader. What should I be thinking about?

How do we instill a culture of more feedback at our company?

I know I have some quirks as a leader. Some I'm working on, some I'm fine with. How do I make that known to my team?

Coming up

How can we effectively onboard a new leader?

Do I really have to put referrals from people I trust through recruiting?

How can we make skip-level meetings useful for everyone (and not a huge time suck)?

How can we make Slack work better for us?

Any tips for a lightweight review process? I want the feedback to flow without having to implement a whole system or tool.

Can I have favorites?

How do we wrangle the docs sprawl?

As always, if you've got quirks and quandaries of your own, or just wanna say hey, you know where to find me!

Designing Good Process

The quality of the processes your company runs on will dictate how it feels to get the work done. And the difference between a good one and a bad one is significant.

Good process helps everyone at the company make more efficient progress towards their goals and ship better stuff. Good process reinforces your company's values. Good process helps teams stay focused by setting predictable expectations for when work is open for feedback, and when teams should be heads-down building. Good process helps reduce cognitive load for project stakeholders because the next conversation about critical projects is already scheduled and on their calendars. Good process encourages people to do the requisite preparation and thinking before they make work-or-company-shaping decisions. Good process helps company leaders provide consistent direction and draw connections in work across the company. Good process makes sure there is an appropriate injection of variance-maximizing activity. Ultimately, good process makes working more satisfying.

Really good processes can even establish company-wide norms that eliminate the need for process.

Here are some principles to consider when you're considering rolling out a process.

1. The best process is no process.

In an ideal state, it all just works. Inertia and osmosis do the trick. Everything flows. When and where that's happening, get out of the way. Here's what Charlie Munger has to say on the topic (in his 2007 commencement speech at USC Law).

"The highest reach of civilization is a seamless system of trust among all parties concerned…The last idea that I want to give you as you go out into a profession that frequently puts a lot of procedure and a lot of precautions and a lot of mumbo jumbo into what it does, this is not the highest form which civilization can reach. The highest form which civilization can reach is a seamless web of deserved trust. Not much procedure, just totally reliable people correctly trusting one another. That's the way an operating room works at the Mayo Clinic. If a bunch of lawyers were to introduce a lot of process, the patients would all die. So never forget when you're a lawyer that you may be rewarded for selling this stuff but you don't have to buy it. In your own life what you want is a seamless web of deserved trust. And if your proposed marriage contract has 47 pages, my suggestion is do not enter."2. Process is about controlling variance.

We treat process as a dirty word because when we think of process, our instinct is to think about the variance-reducing ones; reporting requirements, reviews of work, and performance reviews. But, process can also be variance-maximizing; carving out company time for a hackathon, having the "new product development" org operate on a different cadence than the longstanding ones, or hosting a brainstorm or product strategy session at the outset of work. Aim to have a thoughtful blend of these across your organization. When designing process for an organization:

incorporate variance-minimizing processes where stability, predictability, and consistency is required or valued (ex- security, product quality, HR matters)

incorporate variance-maximizing processes where creativity, big-picture thinking, and innovative approaches are required or valued (ex- early phases of product development or design, longterm strategy, brand marketing campaign)

3. Motion <> Progress

One trap of processes is that they can make it easy to confuse motion for progress. When you're writing the QBR or sending the weekly metrics update or preparing for All Hands, it *feels* like work is getting done because people are, in fact, doing work. But, a process that doesn't drive, with focus and efficiency, towards an outcome is a bad process. Note: Company planning is often a good time to take a broad view at the processes the organization is running on, and determine whether any updates are required.

4. Beware of neophilia

Organizations that are built on innovation are predisposed to orient towards what's new and novel. But, the complexity that results from a piling one process on top of another without any gardening is the quickest way to slow you down. This is particularly dangerous for startups where speed of execution is often its greatest (and sometimes its only) advantage.

In other words, part of the art of establishing Good Process at your company is a commitment to spotting and eliminating the bad processes. Because they pose an enormous risk to a company by slowing people down, diluting the work, and frustrating or demotivating those involved. This is especially tricky because what is a good process now may be a bad process in 6 months from now.

Have the discipline to remove process as often as you introduce it. Take as much care in extracting it as you do when you inject it. Celebrate what unships as much as what ships. It might kill you if you don't.

5. Processes require owners, too.

A process needs an owner just as much as any other company workstream needs one. When a process gets implemented, give it an owner to ensure that the desired outcomes are articulated (even if a bit squishy) and that the health of the process is not only upheld but also re-evaluated regularly. The process owner is also responsible for identifying when an evolution or removal of the process might be necessary.This responsibility often defaults to the manager's job, but it does not have to. In fact, it is often more efficient (and a boon to org-wide trust and connection)when a process is owned by people across the organization, not just managers.

6. Design for fault-tolerance.

The goal should not be no breaks or slips ever, ever, ever. That's how you choke your organization and everyone on it. Think more bumpers and cushions. In Boz's words (from his iconic post, Antifragile):

"In engineering we often face a choice between trying to eliminate failures or making our systems handle them more gracefully. Both approaches are important but in my experience fault tolerance is the more valuable. The reason is simple: we can only eliminate failures we can imagine while fault tolerance adds some resilience to failures we could not imagine."7. Rubbish in. Rubbish out.

If the raw data is bad, the analysis of it won't be useful. In fact, it might be worse than useless because it could point you in the wrong direction entirely. A good way to create process that only slow you down or steers you wrong is to implement them without thought and care.

If the goal of All Hands is to educate and dazzle your team with the great work going on all around the organization, but the presentations always fall flat, you're wasting time. If the goal of the Quarterly Business Review is to evaluate the progress of a workstream, but the project owner doesn't reflect on contributions to the right metrics, you're wasting time. If the goal of the meeting is a key decision, but the attendees aren't prepared to make it, you're wasting time.

Be diligent about the rules of engagement. Be crisp about what goes in and what must come out.

8. Soul where you can

When you can, give your process a bit of soul. Do the things only your team, with your mission, and your users, and your tastes, would do. Give them special names. Create special artifacts out of them. Make their participants feel like they're part of something special. Don't just call company-wide planning, planning. Call it OP-1 and OP-2 for Operating Plan (Amazon) or VTFM for Vision, Theme, Focus, Measure (Atlassian) or OKRs for Objectives and Key Results (Intel, popularized by Google) or URPs for User Release Plan (Stripe).

It may not sound like these naming conventions would inspire soul with their corporate-leaning terminology, but having your own special way of doing things does.

Ready to something implemented? Take a look at this post on the Five Types of Good Process.

How can we support our managers?

There's a saying that people don't leave companies, they leave managers. I think that's directionally true.

Employees with great managers are more satisfied and do better work. Management is tough stuff, especially now, and I think it's worth investing heavily in resources and programs that support the people that do it.

Here are some ideas for what that could look like.

Write down your management principles. What does being a great manager at your company entail? How is it different than being an IC? Write it down! Make it inspiring to read. (And, evaluate and promote on it).

Manager-specific onboarding and training. Onboarding should get mangers up-to-speed on the tools, systems, resources, and programs available to them. Training should be continuous. These should be mandatory for all managers... and if you're doing a great job they will be incredibly grateful for it!

Note: Hospitals do a great job of ongoing training! They're constantly educating and re-educating their staff on the latest developments and research.

Note: Any IC's that are being promoted into management positions can and should join an upcoming onboarding.

Manager-specific distribution list. There are things that you're going to want to communicate directly and/or exclusively with managers. For example, you might want to give managers an early heads-up about company-wide news   Set up a way to reach them all at once (ex- an email list or a Slack channel).

Note: you don't only have to use this for Official Business. You can also use this to inspire, motivate, or educate your managers. You can even use this as a place to do some "real talk" on your thoughts about the organization. Do a great job and it will be considered a perk or a privilege of management to have access to these musings.

Send talking points for hard conversations: when there are company-wide activities (performance reviews, big company news, bonus season, salary/equity updates, etc.). Remember, your managers are often representing the company in the 1:1 setting with team members who may be asking deep, tough questions! Make it your job to not only prepare your managers to have that conversation well, but also to provide a united front as a management team. It's easy to forget that team members talk and vent to each other about this stuff, and it's especially important to be consistent about the tough stuff.

Informal management community. Manager's need a place they can communicate and problem-solve with each other informally. Something as simple as an (invite-only) Slack channel can go a long way. But, make sure the norms are set early that this is a safe and inviting place to talk about the real challenges. You can also offer some budget to managers for spending time with other managers.

Manager mentors. By formally connection managers up with mentors up with other, more experienced, managers that aren't their manager, they can ask questions without fear of being seen as performing poorly. If your organization doesn't have enough of these people, you can even consider look outside the organization.

Trust from leadership. Managers must be trusted to make decisions on behalf of their teams. So long as it plugs in well with the broader organization, managers should be able to staff work, report on progress, and run their teams how they see fit.

Clearly-defined ways to advocate for their people. Whether this is calibrations or project selection, managers need to be able to advocate for their people. If they have no agency in the decisions that affect their teams, they will not be able to be good managers to their people. For example, if a manager is advocating for an employee to get a raise, they should be able to do that as someone who sees the employees work everyday.

Time with other leaders. Managers should spend time, formally and informally, with company leaders. This is how they will learn. This can take the form of attending meetings that leaders are running, 'shadowing' leaders in their work, or participating 'roundtable discussions' on leadership topics. This is especially important for first-time leaders.

Pay and promote well. This includes equity.

Have an emergency escalation path. If a manager needs immediate support on something, they should be able to get it. Think about this like an on-call response for an engineering team but for your HR and/or leadership team on management issues. People issues could pose the same level of existential risk to the company.

Offer administrative support. Managers shouldn't be divas, but administrative tasks can eat a lot of time for managers. Having professional administrative support can free up your managers to focus on their people and run a more efficient organization. There is some 'status' associated with this so offer these fairly.

Managers-only offsite. This should be a fun and engaging forum for managers to learn and work together as a team. Just like a full-team offsite, a manager offsite will help managers find and build their own connections and community as managers. This is also a great place for expressing gratitude for all the great work they do for your organization.

Note: this can also be aspirational for IC's who want to move into management.

Special programming from first-time managers. It's great to provide opportunities for IC's to transition into management, but we all know that IC work doesn't prepare people for management work. Make sure new managers have a not only the resources they need to do a great job (access to the right tool, training, etc.) but also a human support system (their manager, an experienced manager that isn't their manager, HRBP, etc.) that they can go to with any challenges.

Do everything you can to keep great/promising managers. If you spot a great manager, do whatever you can to keep them. They can make a HUGE impact on your organization. This can be as simple as letting them know you notice their contributions, spending time with them, or leaning on them for strategic company decisions, setting them up with exciting opportunities, or (if they're green) spending time nurturing/mentoring them.

Getting feedback from managers. What is it like to manage at your company? What are the blockers to success? How can you help? I'd recommend surveying managers at least twice a year. You can use what you learn to inform the curriculum in your manager training.

Getting feedback on managers. Invest company time in skip-levels and ask team members directly how their manager is doing. (Let the manager that reports to you know about this in advance though. You don't want to break trust, but you do need to establish an independent sense of how they're doing). Your employee voice survey isn't going to do a good enough job here–even if you get the broad brushstrokes on how a team rates their manager, the nuance won't come through, and that's what really matter here.

What not to do

Treat management as uncool. There's a meme I don't like that management is about lame, low-impact, paper-pushing. That's true when it's done poorly. When it's done well, it's an incredible lever. Treat it as such.

Make management the only growth path. If someone doesn't want to manage, they shouldn't have to. If management is the only path to 'career progress' in your organization, you will find yourself with a lot of bad managers.

Keep "management stuff" a secret from the company. Management training, offsites, etc. should not be kept from the broader team. This will only create instability and mistrust for teams.

Leave them out of performance conversations for their team. If managers are trusted to evaluate and/or advocate for their employees, they will not be able to be successful managers.

How should we run our candidate referral program?

How to get employees to refer people in their networks

Build a company that's great to work at! If current employees love their jobs, they will want their networks to come.

Tell your team when roles open up. And encourage them to reach out to their networks when they do. The more information you can share about what that role will look like and who you're looking for, the better referrals you will get (here's a template for that). Share the role in a way that makes it easy for them to share with their networks (like a link to the job description and/or a script for how they can describe the role).

A crisp and fair recruiting process. It's embarrassing to send people you respect into a sloppy process.

An easy referral process. Make the process easy to plug into. Don't make people jump through hoops to get great people in the door.

Host sourcing jams. Put some time on the company calendar for sourcing. Brief the group on what roles you're hiring for, what a great candidate looks like, and then collectively contribute to a list. (Playing good tunes and bringing treats to snack on never hurts).

Here's how a highly-functioning referral program should look

All internal referrals get their resume seen. They are not entitled to a call, but a referral should guarantee a resume gets the team's time.

All internal referrals receive a response. You should strive for a "no limbo" recruitment process everywhere, but it's especially important for referrals.

Acknowledge degrees of referrals. There's a huge difference between "I worked with this person for a decade and I'm dying to work with them again" and "a friend of a friend said they're good and maybe we should hire them." Your system should be aware of this, make room for referrals across the full spectrum, and have flows designed to accommodate each. Degrees might include:

1st: someone you have worked with directly before for over 2 years

2nd: someone you worked with at another point but not directly

3rd: someone you know personally, but haven't worked with directly

4th: connected with (friend connected you, you have chatted but have not worked with before)

Referrer should be notified of major changes. Like coming in for an interview or offered a role. But, they should not have access to any of the detailed interview feedback. (It just puts everyone in a tough spot).

It's up to you whether the interviewing team is aware this is a referral. But, make it consistent.

Frees up (but doesn't replace) time for recruiters: with a reliable, smooth process in place, your hiring teams can focus on sourcing candidates from other places

The case not having referral bonuses

Offering a few thousand dollars is a nice idea, but the best incentive for getting great people at your company should be getting to work with great people (and, increasing the value of the company they might be a partial owner of).

If you want an employee to feel valued for participating in the recruiting process, give bonuses for how many interviews they complete or how many sell chats they do, instead.

At Stripe, we didn't have them. At Figma, we did. (I'm not proud of this fact but) guess which company I made more "meh" referrals in...

Internal Referrals should not be your primary source of employees

If you only hire referrals (especially if you're >100 people), your recruiting process isn't in as good shape as it could be. Referral offerings should be one of many tools in your pipeline generation toolbox.

If you don't have ways to hire non-referrals, you're going to end up with a pretty homogenous work environment that's going to make it increasingly difficult to hire diverse talent into.

What makes a good leadership offsite?

It is important for leadership to know each other and work seamlessly together, for all companies and especially the rapidly-growing ones, and one of the primary benefits of a leadership offsite will be simply spending concentrated time together. Balancing structured and unstructured time will help everyone get to know each other better as teammates and as people. If the leadership team values this, the rest of the company will follow suit.

Attendance

Have clearly-defined principles for who you are inviting. Maybe it's only people reporting directly to the CEO. You should be able to explain your selection criteria in consistent terms to anyone who is asking.

Remember, keeping attendance small and concentrated helps keep the conversation flowing and open. Invite others for any other reason than you actively want their perspective and they will meaningfully contribute to the conversation will make it worse for everyone.

You can always invite others to present or come for certain agenda items (ie head of recruiting or head of HR for talent review). Or if a single project is being reviewed, the DRI to that project can join.

You may want to invite someone who is responsible for logistics and/or note-taking so that the rest of the group can be focused.

When to have it?

I recommend at least a full day quarterly. This will feel like a lot. It is and it isn't.

If you are not operating efficiently, move to a full day a month! If the team is not in sync, more time together through offsites is usually the most efficient path forward.

It may be helpful to schedule these around company planning, board meetings, or other meaningful company moments.

It can be really hard to get schedules aligned. Plan far in advance so everyone can block calendars!

Where to have it?

I suggest seeing each other in person and getting out of the office but don't waste tons of time traveling.

Note: if the executive team is flying or driving, they should not all travel on the same flight or car. Usually a board puts this rule in place but it is a good thing to get in the habit of doing

Potential topics

BIG ideas! Set the company big ideas and narrative, this is probably the most important part and reason to have an offsite. Getting out of the typical workflow makes the space to imagine the company in ten years and beyond.

Brainstorming: what can your collective knowledge produce?

Ask leaders: what topics would they want to bring?

Planning: getting the company rowing in the same direction

Performance: how is the company doing? are you happy with execution? what could be better?

People: save time to discuss the humans that comprise the company: are people overworked? How is company morale? Forcing this conversation will also force a resourcing conversation

Get to know you activity (especially important if anyone is new to the group or there is uneven tenure)

End with dinner or something to celebrate. This is really important and keeps morale up and relationships close. Be careful with how boozy these get if you want to have a productive day.

Meta-organization

Assign an owner for the overall structure and comms to the group. This doesn't mean that they have to do all the work, but they are responsible for streamlining things.

Each topic should have a person responsible for leading and facilitating the live discussion. It works best if the leader facilitating has the least amount of state in the project. It also divides the work of the offsite.

Build in breaks: this way, people have time to tend to the work/personal stuff they need to outside the sessions.

Collaborative working time/space: it's nice to have time/space dedicated to working alongside each other, even if not working on the same stuff.

Consider how you are spending the company money and what that signals to the rest of the company.

What to share with the company after

Tell the company what topics came to the table. This doesn't mean sharing anything sensitive. It can be as simple as 'discussed future plans, learned a fun fact about the CFO and had a great dinner at Zuni Cafe.' You don't have to share decisions and state secrets from an offsite to be transparent and include the rest of the company

Humanizing an executive offsite helps other teams mimic this behavior too and offsites across the company will be more impactful.

My favorite company-wide communication hubs

Company-wide communication channels organize conversation in a way that allows everyone to contribute and follow along productively. Here's a list of my favorite hubs for doing that. As you'll see, some channels are directly related to sharing company news or the work output of the organization and some are more focused on cultivating connection and community.

First, a few things for you, as system architect, to keep in mind

be user-focused: think about not only what content you hope is shared around the organization, but also what an average employee in the corner of your organization would get from following along in this channel. I'll phrase the channel descriptions below accordingly.

company comms flow all ways: a company-wide communication strategy shouldn't only consider what communicated tops-down–it should be co-created through side-to-side communication between employees (and the norms you establish to ensure that what's shared is always high-quality)

if you build it, they'll (probably) come: by setting up a company-wide distribution channel, you also signal to the organization the kinds of information you want to see. For example, if you set up a channel for retrospectives, you are telling the organization that you would like to see forward-looking reflections on work completed.

be clear about what good looks like: when you spin up a new channel, you can provide templates/instructions for what should be shared and/or seed it with good content!

channel 'rangers': can be appointed to ensure channel norms are being upheld and/or appropriately evolved

For creating a strong center of gravity at the company that helps everyone internalize the mission and work

#chat: share something with the rest of the company, get a pulse on the company zeitgeist

#company-announce: (read only for most): stay abreast of company-level news and updates

#company-digest: a summary of what's happened at the company lately and what's upcoming

#questions: ask/answer questions on relevant things, see what's on the mind of colleagues

#inspiration: work that inspires the team from outside the company (reads, products, visual language, etc.), also a taste-generation mechanism

#win-wire: see what wins are happening on the sales/account management /support teams (think closing deals, big upsells, meaningful launches), celebrate successes of client-facing teams

#$leader-notes: learn more about what's on the mind of company leaders

#suggestion-box: way to suggest/see what others are suggesting for company-wide improvements

#company-metrics-updates: progress on key metrics (and why), and see how work is laddering up/influencing company priorities

#company-scrapbook: to post/read things you'll look back on fondly one day, especially photos!

#industry-news: relevant things going on in the industry that everyone should know about

#hi-fives: thanking/getting thanked by colleagues for support, acknowledging great work from others around you, see how is doing what work

#user-feedback: post/read things users are saying that seems impactful, see what watering holes users are in

All Hands as ~catchall: Experience a sense of camaraderie with colleagues, get updated on key company motions/priorities, see/get inspired by the great work colleagues are doing (and what the leaders would qualify as great work, (When asked) Share updates with colleagues about great work

For establishing company-wide context and advancing the collective knowledge of the organization

#org/#team-updates: for people updates -- about the shape of the organization, where people sit in it, new people

#starting-line: workstreams that are getting started, in case it makes sense to chime in or collaborate

#leader-snippets: see what leaders are focused/working on

#shipped: what new stuff just launched (and the collective celebration around it)

#state-of: learn how things are going with a given workstream, project, or team

#retrospectives: learning from experiences of others

#notes-and-decisions: scan for potentially relevant meeting notes/decisions impacting his work, poke around topics/teams he's curious about who cross-posted here--and it's probably more interesting than twitter

#job-opening: see what new roles are open at the company, maybe refer people to them

#board-slide-review: see what the company is presenting to the board (with sensitive stuff redacted), correct anything that is misrepresented on work he is close to

For facilitating cross-team connections outside of the work

Fun/community-focused channels (ex-#wellness, #volunteering, #coffee): connect with colleagues over shared interests

Geography-based channels (ex- #seattle, #louisville, #boston): connect with colleagues nearby physically

#overheard: laugh about things colleagues say

Note: I highly recommend leveraging go/links to to make finding this stuff easier for everyone!

How can I breathe new life into the way I address the company?

Many founders I work with (admirably!) aspire to have a practice of "weekly notes" wherein they wax poetic to their employees about all the things on their mind that week... and they (reasonably! and quickly!) learn they just can't find the time every week.

That's okay! Your team doesn't only want to hear from you on Sunday evenings anyway. They want to hear from you all the time. Trust me. And sending great everyone@ emails is a habit and skill worth cultivating.

Some principles to keep in mind as you do

What you know <> what your team knows. Remember, all the information at the company is designed to flow to you at all times. Things that seem totally obvious to you, might seem extraordinary to someone who hasn't been talking about it all day.

Sharing will make team members feel closer to you: as your company grows, the distance between you and the average employee is increasing. By popping into their inboxes from time to time, and giving your team access to what's on your mind, you'll keep those bonds tighter.

You'll get useful (and unexpected) responses in return! Including from people you might not see or talk to regularly. Communicating to everyone is a force for flattening your org and making access to you and your ideas more democratic.

Real talk, personality, vulnerability: If your employee wants the massaged messaging version of something, they can go read the company blog. This is the stuff for your team's eyes only. Treat it that way. (But also assume that it could leak).

One of the perks of being at your company should be hearing and learning from you. Many people probably joined your company because you are the one leading it. This is a great way to continue making those deposits of good will and trust into your company.

There's a trend in leaders publishing internal comms: This is the tweet from Stripe founder and President last week that inspired this post. Giving the public the "under the hood"

Half-baked ideas are fine: Just say so. Bringing everyone along in your thought process will build trust and make it easier for everyone involved to stay aligned on big decision. It will also encourage other people at the company to do the same.

Be clear about whether something is a directive or a fleeting thought. Cheryl Sandberg has this amazing story she tells about her early days of leadership. By her memory, she tossed a random (and rather mediocre) idea out at the end of a meeting, and then didn't think anything of it. Two weeks later, she had a report on her desk how things were going with that random idea that a full team of people dedicated two weeks of their time to. Oops!

Make it count: Don't just say stuff to say it. Start with the thing you have to say, then say it. Use your stage well. Cadence doesn't really matter. The volume of notes to the company will probably ebb and flow. That's okay.

Run stuff by a small braintrust before you hit send. Bouncing ideas off a small group will help you make sure your communication stays high quality. It will also make those people feel really, really special. Rotate that group regularly to get different perspectives...and broaden the set of people that you make feel special.

You might want another, similar distribution list for company leaders and/or managers: There may be content that isn't appropriate for everyone, but is appropriate for leaders.

Some ideas for the kinds of things you might share with the company

musings on product/company direction

pointing out great work

pointing our things that need work

celebrating milestones and people you're proud of

notable takeaways from decision-making meetings and reviews of work

riff on challenges you're facing

sharing the articles/books you're reading

your observations about how things are going (at any altitude level)

telling us about who you're meeting with outside the company and why you think they're cool

tell us about your latest favorite user or a neat usecase you encountered

share something that's inspiring you

invite us to chime in on something you're working on or thinking about

Good stewardship in Slack

If you really want to get me riled up, all you have to do is ask me about my thoughts on Slack. As part of my (probably never-ending) journey to wrangle my thoughts on this, here are some thoughts on how to use Slack well.

I'll also say that this conversation between Ezra Klein and Cal Newport on the topic was one of the most illuminating and clarifying takes I've encountered on the topic. I wrote my notes and takeaways here in the event you're not inclined to listen to the full hour-long conversation.

The particular insight that helped me understand our magnetic (even when it's maddening) pull to Slack is that if our tribe is talking, we want to know what they're saying. Imagine seeing a crew of your besties chatting in the corner at a cocktail party–how could you not walk over?! With that understanding of the spell Slack puts us all under, no matter how many tricks we have up our sleeves to set our own boundaries with it, here's how I think we can make the best use of Slack in our organizations.

By upholding these norms, and encouraging others stick to these too, I think we can make it more likely that Slack contributes to our productivity, efficiency, feelings of connectedness, and work satisfaction (instead of taking away from it).

The best version of Slack

The most basic description of Slack is a chat application for a community's communication. The best version of Slack is the central (and searchable) hub for all community information. In other words, if you need or want to know something (even if you don't yet know you need or want to know it) it's in Slack!

One counter-intuitive thing about the way we use Slack is that in most contexts, we communicate with people directly to get the things we want or need. It’s very common to shoot someone a text or email or pick up the phone for a quick call. But, in the work setting, when many people can benefit from more context, the DM model breaks down. And beyond that, our instinctual mental models of communication at work are primarily “call and response”– I make a request and someone responds (or vice versa). So, our communication system becomes all about reactivity.

But, if we want to make Slack a truly great resource it should be more than a reactive DM machine. It should also be a river of information that establishes a system of shared knowledge that everyone can rely on.

Knowing your purpose

If we think of Slack a tool for communication and a hub of information, we realize that our communication can and will have one of two purposes. This is important to acknowledge because the space and and norms you use to communicate should flow from the purpose of your communication.

get something done: this is the stuff that usually requires a response. The goal here is to advance work as efficiently as possible.

share information: this is the stuff that doesn't usually require a response. The goal here is to contribute to the collective knowledge of the organization.

Knowing your role

One challenge of Slack is that we play multiple roles at a time, and the role we play is very context-dependent. I've found that it's still helpful to articulate what those roles are so that we can ask ourselves "what is my role here?" and then participate accordingly.

System architect: defining the rules such that the whole system is reliable and easy-to-use for everyone. this might include things like channel naming conventions or setting up org-wide reminders or integrating with tools like calendar.

Writer: publishing into the system

Reader: consuming what's published into the system

Quick overview of ways to communicate in Slack

Direct Message: private one-to-one message (similar to a text)

Group Message: Conversations between more than two people, outside of channels (similar to a Group Message on text)

Public Channel: Dedicated spaces for talking about any project, topic, or team in the open

Private Channel: Dedicated spaces for talking about any project, topic, or team in private

Should I Slack or email?

This will largely depend on your company's norms, but here's what I typically see:

Default to Slack for internal communication: this way, everything is searchable and referenceable ongoing. It'll also make Slack the source of truth for everything going on!

Default to email for external communication: use email to communicate with external partners.

There will be exceptions: Try to uphold this system when we can, but you shouldn't have arbitrary rules that make things harder. If something doesn't play nicely with this approach: (1) build the system that works, (2) communicate it to your stakeholders, and (3) document it for the broader organization.

Should I Slack or meet?

Meet when: a discussion is warranted. We don't have to be too dogmatic about this. Trust your instincts.

Slack when: coordinating about that meeting. Fuzzy lines between sync and async is a part of navigating the modern work environment. Trust your instincts, ask colleagues for support, and adapt along the way.

Should I Slack or create a document?

Use a document if you're creating an artifact of work like a job description or a meeting agenda.

Message in Slack to link to that document, let someone know it's ready to look at, or request their collaboration on it.

Linking to documents in Slack makes them easy for you and others to search for later. Remember, we're aspiring to make Slack the center of our communication universe. For example, you might post a link to an agenda for an upcoming meeting.

Communicating in Slack

Overall, the expectation is that everyone stays on top of their own Slack. When it comes to messaging, the most important thing to remember is that communicating in Slack doesn't have to mean notifying and interrupting someone. The way you communicate will help the recipient know how to treat the message.

Ways to create a notifications in Slack

A notification is what creates that little red and white number in your Slack app. Other terms you might see or hear that can be used ~interchangeably with notification are: message, @'ing, @-mention, ding, or ping. For example, "can you ping the group about this?," and "can you message the group about this?" means the same thing.

@'ing : will create a notification.

@channel can be used within any channel to ping every person already in that channel. (Those who are not in the channel will not be notified about @channel notifications in channels they are not in). But, with great power comes great responsibility. Only use this when you absolutely need to grab everyone's attention now. (For example, "@channel, heads up All Hands is starting!")

@here is like @channel, but is typically better received, as it only notifies channel members who are currently active on Slack. (For example, if you're in #coffee and looking for a buddy, you'll want to use @here to ask all currently online if they'd like to join you.)

Note on non-notifying new messages: If someone sends a message to a channel you are already in, starts a thread based on your message, or contributes to a thread that you've sent a message in, you will *not* get a notification. Instead, the channel or the 'threads' section will go bold.

@[team name] (or, user groups) will alert predefined members of a team, even if there are others in the channel. Slack calls these 'user groups' and here's how to create them. If you are in a large channel and just want to ping the members of the direct team, default to @[team name] rather than @channel or @here.

Keywords/Ding words: Stay on top of projects you're working on or topics you want to know about by setting up keywords in your notification preferences. Whenever the word you include is mentioned, you'll get notified. These keywords will supersede any channel preferences–in other words, if someone says a keyword you set in any channel, you'll get notified. Here's how to set that up. Some examples of words you might want to include are your name, or the names of clients or projects. You can also include words like 'coffee' so you know if anyone's going to grab some when you might need it.

(a note for system architects) your company can align on org-wide keywords so that everyone knows how to get everyone's attention for particular matters. Examples are "911" to alert everyone about emergencies or "PSA" to let everyone know about a 'public service announcement'.

To @ or not to @?

Remember, There are two primary purposes for messaging someone (whether an individual, group, or channel) on Slack. 1/advance work that relies on someone else 2/contribute to the collective knowledge (or, "pool of ideas") of the organization.

The purpose of your message will dictate best practices for sending that message.

If your goal is [1] to advance the work: you probably require someone else's attention immediately. Sending a message by @'ing them (or, @channel'ing) will do this by creating a notification on their end.

Remember, notifications can be interruptive to others so before you @ someone, it's worth doing a quick gut-check that you can't get what you need without engaging someone else.

Communicating urgency: When you request someone's attention by @'ing them, you should let them know if a response is urgent or non-urgent and when you need a response by.

If your goal is [2] contribute to collective knowledge: you probably don't need to get someone's immediate attention, so just posting (without an @) will do. This means that the information will be available to be read (and signaled by the channel name going bold in the left hand feed), but it won't create a notification for anyone.

When you send a message, default to using public channels as much as possible to increase access to shared knowledge across your workspace. You never know what information or insight is going to benefit someone else! (More on channel best practices below).

Even if you are requesting the attention of a single person, it's best to @ them in the appropriate public channel so that others can benefit from the context or information (and find it later).

Slack maintains an ongoing record of work: Just like email, Slack maintains records of all communication that can be searched or references later.

You can search for messages across all of Slack in the search bar at the top. This will include all public messages. You can also refine your search by specifying a channel, to/from, whether it has an attachment, and more. Details on that here.

Tips for messaging well

Send a message later: if you have something important to share, but now isn't the best time to communicate it, you can schedule a message to be sent in the future. Here's how.

Use threads: to go back and forth on a single idea.

Note: if you need to get someone's attention, @'ing them in the thread will send up a notification.

Re-ping if someone hasn't responded to your message, follow-up in a thread by @'ing them. This will send another notification.

Slackbot creates automated messages and tasks. For example, you might want to use one to post automated messages in Slack like scheduling a message that goes out the week before All Hands that says 'what should we talk about in All Hands next week?'. You might also want to use one for automatic responses. Like, if someone says 'what's the wifi?' you can have Slack automatically return a message that links to it. More on Slackbots here.

Reminder commands: you can set automatic reminders for yourself in Slack. Just tell Slack what content you want to be reminded about and when to remind you. (For example, ('remind me to follow up with Alice on Friday at noon'), and Slack will send you a message. It'll appear just like a notification for a message from someone else. Here's how.Slack integrates with other applications (like Outlook/Google calendar or Zoom) to make it easy for it to be the central hub for communication. You can read more about that here.

Tips for for managing your notifications and availability

You should probably read all messages sent:

Directly to you

To #general

To your team's channel

To channels for any workstreams that you are a meaningful contributor to (or stakeholder of)

If you're unsure of whether you should pay attention to a particular channel, talk it over with a colleague or manager.

Mark unread: If you read something but you're not quite ready to respond right now, mark it 'unread' by clicking the … on the message. This will keep the notification up.

Remind me about this later: when someone notifies you about something non-urgent while you're in the middle of something, you might want to be re-notified about it later. When this is the case, click the … on the message, and then remind me later and pick a time. This will get rid of the notification icon temporarily and re-ping on your selected time frame.

Set a status: You can set a status in Slack to manage expectations for your colleagues about your responsiveness. For example, you can let others know when you're in a meeting, out to lunch, sick, or out of the office. Here's how.

Snooze/Do Not Disturb: If you need time to focus or time away from work, you can pause your notifications. All notifications and @mentions and team members will see a Do Not Disturb icon next to your name until you end your session. Here's how.

Note: someone can make a decision to override this when sending a direct message, if they really really need to. That way, you're not at risk of missing something truly urgent.

Using Slack Channels

Channels help organize conversations so that everyone can contribute and follow along productively. Channels can be used for teams, topics, or projects.

Perhaps the biggest shift companies make in communication is moving conversations into public channels instead of direct messages or group messages. These are norms you should set as a company and it should be perfectly acceptable to say "can you re-post this in a public channel?" if someone DMs something that doesn't need to be DM'ed.

One mistake I see a lot of teams make is trying to minimize the number of channels. But having lots of highly-targeted channels helps everyone know where to go to post or read and allows people to set up efficient notification preferences. For example, if your company-wide channel is used as much for business-critical announcements as it is silly inconsequential team chatter, your team members are going to have to stay on top of all the silly stuff to make sure they don't miss what matters. If you split them out into #announcements and #chatter, team members can have notifications set up on

#announcements and pop in to #chatter when the mood strikes.

As teams grow, having conversations in channels will make information easier to find as you produce more of it. Channels will also make your company more friendly to newcomers because they will be able to read the channel history for context.

What channels should we have?

Here's a list of some of my favorite company-wide communication hubs. These primarily satisfy the "contribute to the collective knowledge of the organization" purpose.

Channels that "advance the work" should also be spun up for teams and projects.

You may want to establish some company-wide norms or conventions for doing so in a way that makes them discoverable for those that might not have full context.

Creating a new channel

You can spin up new Slack channels whenever you think it'd be useful. For example, when a new project is getting kicked off. Here's how.

When you do, announce it in #general so that others know it exists and can join if they want to.

If you think someone in particular should tune in, DM them and say so to make sure they don't miss it

Add a description so everyone knows what the purpose of the channel is. Include anything participants should know about how to be productive contributors to the conversation in the channel.

Pin messages and bookmark links to keep important messages visible no matter when someone joins. The effect is kind of like a virtual bulletin board. Here's how.

Keep an eye on the channel and make sure everyone's using it as intended. This is especially important in its early days while the norms are being set.

It's up to everyone to maintain the right set of channels for the work. It's always going to be a work-in-progress! Expect to retire channels that are no longer useful (more on at below) and spin up new ones to keep up with new work.

Consider appointing a channel ranger: who is in charge of upholding and evolving the norms of that channel.

Tips for keeping track of so many channels

Star important channels or direct messages: When you do that, this channel then appears at the top of your list in the "Starred" section. This will allow you to separate channels you use and read all day from the ones you're in in case of pings or just to get up to speed with what's happening in those teams. The channels not starred appear separately in the "Channels" section of Slack. Here's how.

Mute channels: By muting a channel, you won't be notified every time a new message comes in. You can also set up your channel preferences to only notify you if you are mentioned. Here's how.

Align on naming conventions: Since channels are organized alphabetically by default, your team can decide on naming conventions (ex- #team-marketing, #team-collections, #project-book, #project-think-different, #fun-coffee, #fun-gardening), so that channels naturally group around others like it.

Archive or delete a channel when it is no longer active. Here's how.

Archived channels are closed to new activity, but the message history is retained and searchable.Deleted channels are permanently removed from a workspace, message history included. More details here.

Tactic Spotlight: Stay Interviews

You do exit interviews, right? Stay interviews are kind of like that...except no one is leaving.

A clear signal that you care about your people: Don't just say you care. Show it by taking the time to talk to your team about their perspective and overall satisfaction.

Get ahead of issues at a simmer: by proactively asking what could be better, you can start to

It's about more than retention: It's about getting a nuanced perspective on how things are going at your company.

Supplementary/complementary to your Company Voice Survey: this shouldn't replace hearing from the whole company.

Start asking your top performers: you probably want your company to work particularly well for your stars. And, it will be deepen your relationship with them.

But, it's not only about keeping your stars: it's about setting up the conditions in your organization that make everyone more effective.

Have every leader conduct a 3-7 per quarter. Then, trade notes. This will give you a good enough sample size to identify some trends. Don't double dip in a given quarter, though.

Proactively follow-up: If you take action based on something you learned in a stay interview, follow-up. It'll mean a lot.

Structural transparency vs content-level transparency

Many companies I work with consider transparency a virtue. But when I started to really dig in, it became very clear very quickly that "transparency" is one of those words Molly Graham would call a black hole word– (paraphrasing here) words that everyone uses freely but lack a concrete definition. And I find that transparency is a particularly tricky virtue because it's almost impossible to disprove because no one knows what they don't know.

Let's say a company preparing for a board meeting.

Who knows the meeting is happening: how much do they know about the meeting? timing? attendees? content? do they learn about it before the meeting happens or after it's over?

Who has write access to the prep documents: Is it just the board deck working group? Are subject-matter experts invited to contribute directly on the document or do members of the working group translate the information? Do they get access to sections or the entire thing?

Who gets reads access (and when): Do you share it with leaders around the organization? The finance team? Everyone? And when are those invitations extended? Before or after the meeting?

What most people are talking about when they talk about 'transparency' is what I would call structural transparency. This refers to what information is shared freely and openly across the organization and with whom.

But, another critical part of transparency norms comes down to what I would call content-level transparency, insight into the raw work as it's happening.

It's also important to acknowledge that there is such a thing as good or bad transparency. Good transparency answers questions before they come up, brings people along, and encourages consistent and principled decision-making across the organization. Bad transparency distracts people, invites the wrong questions, treats information as currency, embraces gossip as truth, and results in politicking. In the board prep example, you could imagine that some information could be sensitive (ex-personnel updates) or distracting (ex-discussion of upcoming layoffs).

By setting the right norms, and consistently applying them through the right systems, the company can stay on the good side of transparency. And, not just the leaders.

The case for shifting towards more content-level transparency

That is, creating systems and norms that offer more insight into the raw work, as it's happening.

I'll start off by saying that my thinking on this topic was heavily influenced by Stripe's email transparency system. I don't know a single ex-Stripe that has not implemented (or tried desperately to implement) this at their next company. It is an incredibly powerful force for both efficiency and culture and I think more companies should adopt a version of it.

At most companies, if A and B are working on x, no one else would know unless A or B tells them and no one else would have access to details unless A or B invites them. Every company has their own norms for who to extend these invitations to and when. Or, conversely, what filters to apply on information. The first filters that usually come to mind are the tops-down filters; what information leaders decide not to share with their employees. But, the filters that have a much greater impact on the overall transparency of the organization are the ones that employees set up for each other. There are the pernicious filters, which primarily come in the form of hoarding information with the intention of maintaining power (very bad), and the benevolent-intentioned filters, which mostly come in the form of holding information back for fear it will upset or distract their team (less bad, but still not optimal). The norms around this dictate a company's structural transparency.

The challenge with this system is that, even in the most benevolent environments, the filters are always going to be a little off because they require an individual to make a judgment call about every atom of work. Plus, the information funnel is a leaky, unreliable one, especially when it relies on word-of-mouth. Ideas can get taken out of context, delivered at the wrong time, misinterpreted, or misconstrued, even in the most benevolent environments. And when this inevitably happens, a teeny little crack in the foundation of trust gets created. And once a crack exists, the laws of physics dictate that it's probably only going to get deeper.

No matter what those norms are, and no matter how open a company aspires to be, colleagues are required to put an **enormous** amount of trust in each other that the right information is made available to them at the right time. They must believe that the correct information either comes to them when it needs to, or that they will know enough to know what to go asking for, and then get it by request.

The innovation of Stripe's email transparency system was to bolster the structural transparency norms with content-level transparency.

At Stripe, all of A and B's work on X was open for the entire company by default. A and B might still extend proactive invitations to others to join in on or take a look at the work in depth, but C, M, W, and everyone in between could also pop in and check out what was going on for themselves at any time.

Perhaps counter-intuitively content-level transparency, doesn't require trust by default because anyone can see the primary sources of information. As a result a much more genuine trust emerges because they can come to conclusions on their own. And, with filters relying less on human judgements, there is a lower likelihood of those crack-creating misinterpretations (and, people are on better, more consistent, behavior when sharing with a broader audience).

This system trades the broken filter dragon for the information firehose dragon. I'd take that trade any day (there are simple tactics one can implement to help). I know it also sounds hard and scary to think about making all of the information produced at your company available to anyone at any time

(I'll share more about this soon).

There are very few things that you can do at a company that will reliably result in more honesty across your organization and deeper trust amongst colleagues. Shifting your organization towards more content-level transparency is one of them.

A non-exhaustive list of benefits of a content-level transparent system

Everyone can spend less time routing information when the goings-on of the company are available, searchable, and referenceable.

~Primary sources are available on all work at all levels and help anyone go deep on what's actually happening, not just what people say is happening. (Look for the story about the time all of Google's Eng Leaders were fired because their reports of what was going on didn't match what the IC's were reporting in their weekly snippets).

Collaboration time can be reserved for the more interesting (and satisfying work of) exchanging ideas and perspectives.

No one has to reinvent work that's already done. Instead, they can focus on moving the entire system forward.

Publishing to a broad audience keeps everyone more honest.

When everyone relies on the same, true, information, your organization is naturally less political.

The potential for anyone at the company to read what you published is a forcing function for thinking more globally.

Everyone will feel more connected to each other because they have the opportunity to see their colleagues in action and see the context leading up to the work.

Read access is the same for everyone regardless of your function, level, or tenure. High trust yields high trust. (And, trust is more easily validated through primary sources).

You avoid the inefficiencies (and the accompanying hierarchical bullshit associated with) "managers talk to managers who talk to IC's."

There is a high-upside opportunity here to trade "I'm-taking-a-quick-break-and-checking-TikTok" time with "huh-this-company-document-looks-interesting-I-wonder-what-it's-all-about" reading time.

Internal Communication in 3 Acts

Act I: It just works

Team mood = 😇

“When I need something I ask the person I know has the answer”

“I use whatever tool and format feels intuitive”

"I take things right to the source"

“I don’t think about it too much”

“Nuance can get lost in games of telephone sometimes, but we don't really get punished for it”

But...then things start bursting at the seams.

Act II: More cooks in the kitchen

Team mood = 😰

"My work requires coordination across more people”

“It’s hard to find things all of the sudden”

“I’m not always sure who has the answer”

“My notifications are getting a little out of control”

“We’re starting to use Slack a lot more”

"I answer the same questions over and over again"

Trials and tribulations

Tool proliferation: Messages are flying in from all directions–email, Slack, docs, texts, etc. This works when the overall volume of messages is low. But, once there are more people and more workstreams to keep track of, communications stats to feel chaotic and unmanageable across all the channels.

Desire to preserve tool autonomy: Everyone has their favorite tool (and might be awfully noisy about it). But, it's okay to be more prescriptive than you think about what tools the company operates on for internal communication. For example, it's okay to say "we use email for external communication and Slack for internal communication."

Keeping everything in DM's: In most contexts, we communicate with people directly to get the things we want or need. It's very common to shoot someone a text or email or pick up the phone for a quick call. But, in the work setting, when many people can benefit from more context, sharing proactive updates and publishing information into the "pool of ideas" is equally important. Also, it's scary to put things in public where we know others may be looking!

Communicating only to get things done: Our instinctual mental models of communication at work are primarily "call and response"– I make a request and someone responds (or vice versa). So, our communication system becomes all about advancing work, which puts is in a reactive mindset. However, we should also be thinking about internal comms in the proactive/FYI sense because that helps everyone establish shared context.

Read and write permissions are conflated: just because a piece of information is available to read, doesn't mean you can or should contribute.

Fear of comms being too "noisy": Slack and email get a pretty bad rap in the public conversation today. I hear a lot of people talk about Slack and email as source of chaos, stress, and distraction. But, when it's used right, it can be a magical driver of efficiency and hub of information for everyone.

Act III: Drawing the Map

Team mood: 😊

"Slack is a single, searchable, source of truth"

"A lot less telephone"

"I can find the information I need without asking"

"I can manage my notifications... and there are a lot less"

Evolved communication:

The Map is literally drawn: With a lot of information moving throughout your organization, more discipline is required in how/where you post. That includes getting prescriptive about communication, notification, and distribution norms. (More details in last week's post, Good Stewardship in Slack).

Templates: Creating templates lowers the barrier/greases the wheels for producing internal communication and lowers the cognitive load for readers by making it easy to compare apples-to-apples.

Work in "public" internally: By moving conversations out of DM's and into public channels, everything is more transparent by default.

Lots of highly-targeted Slack channels: By setting up highly-targeted communication channels, everyone creates a reliable system for posting and finding stuff. Plus, Slack natively time-stamps everything so it's easy to tell what's current.

Everyone gardens. Everyone acts as a good steward of the system in their own work and is empowered to help each other do the same. Things are always changing. It's up to us to edit the map to make sure it works for us ongoing.

When it's working

More efficient: We don't have to block on each other to get the work done. It's easier to find things ourselves. Self-sufficiency is rewarded, and we'll come together for the work that benefits most from collaboration.

Transparent by default: Transparency is like a well-enforced open-door policy–information is naturally open for others to benefit and learn from. Questions get answered before they come up and we bring each other along in our work more naturally. Trust flows more freely and easily.

Important stuff bubbles up: As more information starts moving through an organization, it can be easy to miss stuff. But, with a communication system in place we can all rely on, we don't have to scan Slack/email all day just to stay on top of things.

Company-wide cohesion: As we grow, it'd be natural to start to feel disconnected from each other. By constantly sharing in public, we're all keeping each other in the loop. And, there are dedicated spaces to connect over the stuff we care about outside of the work.

Reading docs as a job perk: By poking around, you can learn a ton from your brilliant colleagues about the work they are doing right next door. You can feed your curiosity and level up, for "free," by diving in deep on anything anyone at your company, around any corner, is working on.

It's way more satisfying to get the work done!

What should I do with our top talent?

Here's how to spot them, lean on them, and recognize them in ways that actually matter.

How to Spot top talent

Defining top talent: Get crisp on what it means to be a star at your company. Make a list of things you observe in top performers. That way, you can be on the lookout for those qualities.

Be open-minded in your definitions: Top talent can and should come from all teams and skill sets– you need all types of people to make a company work. For example, some of your stars may be great at delivering outcomes for the company or consistently driving results and metrics. Others may be great at mentoring, empowering, connecting, motivating others.

Looking in obvious places: Some of your stars will be immediately obvious–they'll be taking charge in meetings, presenting in All Hands all the time, and have their names on every pull request and ship. There also are very likely people who are quietly crushing it without making noise about it. They might be harder to spot to the untrained eye but challenge yourself to find those people, too.

Lean on performance reviews: These should be a reliable source of data on the people hit all their goals and go above and beyond. It also helps you track performance over time.

Asking your team: the best tactic I'm aware of for spotting top performers is to ask everyone and see which name comes up the most. (I have to say that of all the promotions and raises and grants and snazzy titles I've ever been given, the greatest honor and recognition I've ever received was showing up on this list).

Note: If your personal list of stars doesn't match the top performers according to your performance review or surveying process, you should quickly try to figure out why.

Make the list visible to all leaders: All company leaders should have a shared sense of who your top performers are (even if they are not often directly exposed to their work).

Recognizing top talent

Pay: the easiest way to reward someone at a company is monetary. People want more money and by putting a monetary point on top talent, people can tangibly measure their value to a company.

Equity: Same principle as pay, but it sends a different signal to reward with more ownership of the company vs more cash.

Saying thanks: Leaders should remind their top talent that they are appreciated regularly. Be specific. Don't wait for perf season.

Time with leaders: top performers should have substantial time with leaders at the company. This can come in the form of social time (like meals together), requests for feedback, or work time (getting staffed on projects together). Work time has the benefit of creating real mentorship and feedback opportunities for your top performers.

Note: you can divvy these up amongst company leaders.

At Amazon, top talent was given the opportunity to act as a shadow to then-CEO Jeff Bezos. In fact, current CEO Andy Jassy was Bezos' first-ever shadow.

Do not just reward top talent with 'more work.' You can increase the scope of a top performer's work and give them more responsibility but make sure that work is appropriately resourced and satisfying for the person to work on. Otherwise, you'll burn out your best.

Note: people management is an easy default, but it might not be best for everyone.

Choosing what to work on: Your top performers are likely the ones that have a solid sense of what's best for the business/company and the skills required to get you there. They also probably want to work on increasingly hard problems. By offering top talent the opportunity to highlight and work on those things, you're probably doing what's best for you stars and your company at the same time.

Call them out publicly: This also serves to show everyone else who their role models should be.

Mentor (on rotation?): ask your top talent to mentor others. This doesn't have to be a permanent state, but you do want to create a way for these virtues to spread through your organization.

Top talent as window to the culture

Once you have your list defined, take a hard look at it because it will tell you a lot about what is valued at your company.

Who comprises this list? What are their talents? Where is their time spent? What projects do they work on? Are they paid similarly or are their huge discrepancies? Are ICs and managers represented? Are green and tenured employees represented? Are some new hires on your radar?

If all of your top talent looks and acts exactly alike, something is wrong with your company culture not your talent. If your top talent is completely comprised of engineers or men or people 30 years into their careers, your company is not somewhere a diverse group of people can thrive and you should look to change that.

Tactic Spotlight: User Reviews

Use it to

Stay on top of how your most meaningful user relationships are progressing (and, accelerate and unblock accordingly)

Putting it into action

This is a great forcing-function for remaining user-focused because you're explicitly asking your team members to report on how things are going with key users, from their perspective.

This can apply to existing customers *and* prospective customers...maybe even potentially partner relationships.

Make this distinct from regular reporting on the health of the acquisition funnel (your marketing team can take care of that). This is the forum to go deep on the highest priority potential customers.

Questions you might want to ask in your user review include:

What are the biggest opportunities we have with this user?

What are the biggest risks currently facing our relationship with this user?

What key stats should I know? How do they compare to other like users?

Where have we contributed unique value to the relationship?

Where have they made concessions with/for us?

What context should I have about our relationship with this user? (One interesting format could be a timeline of major events/milestones.)

Who are the key players/stakeholders in our relationship? What are they motivated by? How involved are they? What level of influence they they have?

Do you have any asks of me that would make our relationship with this user better?

Template here

Company Story

Stripe has a process for "Top User Asks" that consolidates requests across all large users and prospective users to help product teams prioritize what to build.

Other instantiation of this mechanism is "deal review." This should be triggered when there is a big decision coming up with a user that could use leadership oversight.

How can we make skip-level meetings useful for everyone (and not a huge time suck)?

Skip levels are a great way for leaders to have visibility into an org and for employees to feel valued. By carving out an hour a week from a leader's calendar, leaders and employees are able to spend time together in a more casual setting and gain direct feedback on many different subjects.

The math: 2 x 30min slots = 8 employees a month = 96 employees a year.

Who should do skip levels

his is dependent on the size of the company and the size of the org

An engineering team may need more 'levels' to skip levels because they are a big team! Ex. an IC engineer of a 300 person engineering team can meet with a pillar lead instead of the CTO. While a smaller team like the people team of 40 people meets with the COO

For a smaller company only the Executive/Leadership teams. Examples: Leader of a sales org, C level executives, high profile leaders

Larger companies may need more manager of manager skip levels but by keeping them at the top level of the company it makes them seem more special

Managers of managers at smaller companies should especially be in tune with their smaller teams and should not run skip levels as a sign up format (they should have regular check ins with employees at all levels across their teams)

What skip levels are not

Comp/Equity/Performance conversations

These can be used for feedback but should be separate from performance conversations

You can use this time to schedule equity/perf/compensation conversations but those should not be called skip levels.

These should not be used for negative conversations, but those should be scheduled by the executive/manager separately. Ex. employee should not sign up for a skip level and then blindly receive very negative feedback that has not been shared before

The process around skip levels

Save an hour slot a week in your calendar (be sensitive to time zone differences)

Have a sign up doc that is shared and visible across the org. To encourage more folks to sign up, this is a good thing not something to hide.

Share doc in an email and in slack channels.

Encourage managers to nominate/encourage employees to attend

Save the time: this is the hardest but until the Friday before (as you week ahead the schedule), hold the time. It shows value to employees you are willing to give the time

Try not to reschedule once the skip level is confirmed, helps the employee feel valued if they are not pushed back.

With 2 per week you will touch about 100 employees a year, if this is not enough consider adding other managers to the rotation. This is also a sign you should hire more leaders!

Making it more than just lip service

Track who is signing up

Is it all from one manager? Is that because the manager is doing a great job pushing their employees for visibility (reward them for that!). Or are people unhappy with their manager?

Is it always the same person who wants a career chat? Why do they need executive touch points every 2 months for a career chat? Are they not getting that from the manager?

Insights across skip levels:

Are you seeing trends in how employees feel about career mobility? Work load? Team culture?

Hat trend are you seeing and how can you apply that to initiatives for your org?

Do people love skip levels? Can you carve out an additional 30 minutes a week for this? Do you only need to save 30 minutes a week? Knowing the data helps you understand where you should spend more time.

How leaders can prepare

If you were sent prep, try to review it!

Briefly check in with manager to make sure there are no major flags you are unaware of going into the conversation

Think about the last time you worked together with employee, and think of feedback you might want to share

Give positive feedback if they did great work!! This shouldn't wait for a skip level but should always be shared in person if you can.

Come mentally prepared for the conversation. Stay off your slack/email/computer. The employee needs to feel overly valued and this is an easy way to do it

How employees can prepare

Bring anything! Specific project? Career chat? Feedback on specific projects? But have something to at least start the conversation.

Do not plan for the leader to have prepared (even if you sent a doc ahead). Come ready to walk through anything you prepared.

You have 30 minutes with a leader so make sure you have actionable asks. If the goal is to get to know the leader better, say that. Be clear with goals and actions.

Talk to your manager about what you are bringing to the meeting. Make sure your manager is aware of the agenda especially as it pertains to career discussions. What you share to your leader will be shared back to your manager.

You can send ahead before but it depends on the leader if they will look at materials before

If asking for feedback, make sure the leader actually had visibility into the project. It is perfectly fine to show them what you did for a project instead of just asking for feedback if they don't know much about the project.

Give the leader a moment to think, silence is not a bad thing. Don't feel silent gaps, let the leader process the information given

Follow up, thank them and follow up with actions, best to loop in their ABP if they have specific actions

The leader might have something they want to talk about, so be prepared that a leader might bring their own agenda items.

Criteria for an effective content-transparent system

In order to realize all of the benefits of a content-transparent system (more on that in last week's post), there are three critical criteria.

There are clear guidelines for what and how to publish into the system

Participants act as good stewards of the system

Active curation and spotlighting of information (at the company and individual level)

Establishing clear guidelines

The effectiveness of a content-transparent system depends heavily on how well-organized the information is. And with information being produced at such a steady clip across the organization, the most efficient way to keep things organized is to publish into the system with a reliable set of tools, tags, and guidelines that enable everyone at your company to uphold the overall taxonomy in the run of work. This way, people outside of the core working group will reliably be able to see or find the information.

At most organizations, information is open on an invitation-only basis across all states and the core working group determines what the norms and tools are for their workstream. This means that employees are only made aware of work that they are proactively invited to see. It also means that people outside of the working group need to leverage an infinite combination of tools/norms in order to plug into the work of others.

In a content-transparent system work in all states is not only open to those who were intentionally brought into the workstream, but also to anyone at the company who wants to follow along with progress. And, by establishing company-wide guidelines for tools and norms, onlookers know exactly how to access any work stream.

When it comes to tools...Companies can, and should, be more opinionated about this than they think; If you've ever had to search for that one piece of information you need in your email, Slack, Coda, Paper, Notion, Airtable, and Google Drive before locating it, you know why. Aligning on a common set of tools will make the system easier to navigate for both writers and readers.

When it comes to norms...the goal is to establish guidelines for how to write into and read from the system using them. This is specifically important when it comes to setting up your communication channels. I wrote about my favorite company wide channels here. You should also consider establishing norms for how and where teams and crossfunctional working groups communicate so that others can follow along.

A few thoughts/tips:

Default to open email lists and Slack groups. Create private ones at your discretion, but they should be the overwhelming minority.

Make a habit of showing work-in-progress. Many of the trust-building benefits of the system come from this phase. Seeing ~unpolished work from colleagues promotes a true understanding of how the work gets done, and how your colleagues do it, which promotes trust.

Ensure leaders have eyes on the raw material and the curated version. There is a huge benefit for company leaders to independently discern the difference between the shape and quality of work that's actually happening and the shape and quality of the work as it is reported up into them.

go/links can provide shortcuts to critical information. Their naming should be foremost straightforward/useful (go/operating-principles). They can also reflect the company's values, quirks, or norms (go/pets).

Thinking in push and pull mechanisms

Push mechanisms are those that deliver information to employees where they are already working (a Slack DM is the most direct example, but you could also imagine an email list that everyone is expected to subscribe to, get notified on, and read as another).

Pull mechanisms: are those that are engaged by people in need of a piece of information or curious minds. They might go hunting on the company's wiki or a team's documentation.

Parsing the information is an org-specific muscle. The better the system is architected, and the more employees act as stewards of the system, the easier it is to build that muscle and the more efficient the org becomes. The best version of this makes sure the content shows up where you already work versus requiring that the spirit moves you to go hunting for something.

Facilitating good stewardship

In order for this system to work, everyone must contribute in a way that ensures the system is reliable and psychologically safe for both writers and readers. Here is a potpourri of thoughts and ideas on that.

For writers:

Be as clear and direct as possible, while striving not to be confused with a robot.

Be disciplined about publishing into the system. Everyone should reliably be publishing into the system according to the guidelines. The vast majority of communication at a company should be in service of actively advancing the work. There are certainly times when waxing or bounding ideas around is appropriate, but that time should be actively contained.

Be disciplined about not publishing into the system. It's very easy to contribute to a pile-on of ideas. It's much harder to exercise restraint such that you only contribute when it's required or useful. Curious followers will likely be the most tempted to chime in without explicit invitation or cause, but they should seldom do so. The time to do it is when doing so will meaningfully improve or accelerate the work. It is also acceptable to chime in with words of support or encouragement.

Confirm the right people/distribution groups are included on every message. If you need to add others, default to cc'ing vs forwarding, so that everyone involved is always up-to-date on the latest without extra work required.

If you catch someone doing it wrong, it's encouraged to remind them how to do it right. (In other words, you should feel comfortable saying something like "can you re-post this in the public channel where others can follow along?")

For readers:

All information, across all phases, should default to open. There are times when read access should be restricted (see: bad transparency) but when you have the instinct to restrict read access, be honest with yourself about why. The thing to really check yourself against is whether politics is getting in the way.

Read access is not the same as write permissions.

Read everything sent directly to you. From there, you are responsible for deciding whether and how to action the information. It is the company's and your colleague's responsibility to proactively push critical information to the places where you will see it.

You manage your own notification preferences. So that you can stay in the loop without getting distracted.

Active curation and spotlighting of information (at the company and individual level)

Curation and spotlighting helps readers know what to pay attention to.

Curated information is packaged for a new, usually broader, audience to maximize awareness and comprehension. It helps everyone operate with more crossfunctional awareness. An example might be the summary of a board meeting or an email to everyone at the company about a newly-shipped product that explains what shipped and how it works.

To go back to the push/pull framing, curation is often about pushing information to the right audiences. Or, to ensure that the right altitude of information is shared to a broader audience. Rule of thumb: as the size of audience increases, so should the level of polish/curation.

Spotlighted work is highlighted for a new, usually broader, audience as something worthy of attention and/or emulation. The company All Hands is one example of a spotlighting mechanism for everyone at the organization because it brings work onto the company stage.

Curating and spotlighting can also happen at the organization, team, or working group level. By posting/sharing content across relevant channels, everyone helps information get to the right people at the right time.

Principles of good transparency

Good transparency answers questions before they come up, brings people along, and encourages consistent and principled decision-making across the organization. Bad transparency distracts people, invites the wrong questions, treats information as currency, embraces gossip as truth, and results in politicking.

Transparency norms are primarily driven by company leaders, who not only set the norms but also act as the master curators of what information is shared with and spotlighted for the rest of the company.

The goal is to create a consistent feeling of stability, honesty, care. And remember, what you say is as important as how you say it.

When deciding what to share, and how to share about it, remember:

There's a difference between honesty and transparency: It's possible to be honest without being transparent. One example might be a sensitive employee departure; the company should probably be honest about the departure occurring, but not transparent about the details of the departure. The company may even want to go a step further and explain why they will not be transparent about the details (ex- legal ramifications, preserve the reputation of all employees even after they have left the company, etc.).

Read access <> write access: Access to information does *not* mean permission to contribute to or edit the information. When you share information, you can also clarify your expectations for how your audience interacts with it. Just because someone knows about an upcoming decision or a decision that's been made does not mean that they can provide input into the decision.

Input <> Feedback: Decisions or news can be open for feedback but not open for input. For example, the company might tell their teams about the newly established process for doing performance reviews. Even though the process for this upcoming cycle is not open for changes right now, you may want to ask your team for feedback once this cycle is over to inform future decisions about the performance review process. (see: Commit to evaluating decisions bullet).

Leaders support all company decisions with gusto: When something is ready for the company audience, it must be publicly supported by every leader. The rumor mill feeds off controversy and tension. If something appears uncontroversial, it will be treated as such in the ensuring conversation about it. Once a direction is set, news is announced, or a decision is made, the expectation is that *everyone* is onboard. No subversions allowed, especially by company leaders.

Note: This does not mean no disagreements (disagreements are a very healthy aspect of decision-making and company-building). It only means that once a decision is made, everyone commits to executing on it.

Share context, explain why: Everyone at the company should be able to reason about/explain to someone else at the company why a big decision was made. "Because x said so," is not acceptable. Help everyone understand the inputs and principles with which decisions were made.

Note: This will not only help get everyone on board with decisions, it will also help everyone become better, globally-oriented, decision-makers in their own work.

No surprises: No one knows what they don't know… until they do. And once they do, you want to be sure the timing is appropriate and messaging is crisp. The company should be the first to let employees know about anything that is going to meaningfully impact their work or the company. One example might be a funding announcement; it'll put a crack, even if a small one, in the foundation of trust if an employee sees it in the news before they hear about it from inside the company.

Leader trust/reader trust: Make sure your readers know how they are expected to use the information you share and remind your teams that this is a positive feedback loop system. If readers are trusted with information and use it to benefit the company, the leader will continue to share and/or share more in the future. If readers are trusted with information and abuse it or use it inapporpriately, the leader will share less in the future. If there is a breach in reader trust, make sure everyone knows.

Note: try experimenting with a sensitive announcement like funding or an acquisition. Tell your team as early as you can and remind them of the sensitivity of the information. No leaks? You can do it again. Leak? Tell your team you're disappointed in the breach, and that it makes it harder to share things in the future.

Commit to evaluating decisions: When a big decision is made, show the company that you are committed to evaluating the health of that decision by 1/outlining your evaluation criteria and 2/announcing your timeline and plans for doing that evaluation. For example, if you are making a strategic investment in a new business area, you might want to announce the team that will be working on it and the revenue targets over the next 18 months and what you intend to do if the business area does/does not meet those expectations. When you make that promise to follow-up, be sure to follow-up. It'll be a boon to building trust.

Note: this can also be a good time to tell people when/how to share their feedback

Common fears with content-level transparency

I know it also sounds hard and scary to think about making all of the information produced at your company available to anyone at any time. And I said I'd share more about this soon and here we are.

You are not alone in your fears about upsetting or distracting your employees. Being considerate about this kind of thing is part of what makes you a good leader and a good friend. But, with a good system in place, you can unlock unprecedented trust and connection at your company.

So with that, here are the most common fears I hear about, and some stories to accompany them.

True stories of Brie's early experiences with Stripe's email transparency system.

The fear of the entire company as your audience

I was having a really busy day when a request came in that required another Stripe's input. Old email habits led me to consider forwarding that email to my colleague without any information. This kind of behavior saves me some time, but requires my teammate on the other side to do some digging into the email to figure out how to action it.

As I went to cc the open email list on my rotely-forwarded email, I thought about what my manager, new colleagues, or maybe even Stripe's founders would think if they saw this email coming from me. I didn't like the idea of someone thinking to themselves "Brie protects her time at the expense of someone else's." So, I took the extra 60 seconds to add the required context in the body of my forwarded email. When I think about it, I bet it saved my colleague more than 60 seconds. It was a small, but still global, optimization.

The fear of colleagues lurking on your work, part 1

In my second week on the job as Stripe second-ever account manager, I got a question from a user I wasn't quite sure how to answer. Like a good Stripe, I looked through our docs (internal and external) and, when that failed to turn anything up, referred to the email archives to see if anyone else had answered this question for another user. Voila! Relieved I didn't have to ask my busy colleague for help, proud of myself for solving my own problem, and impressed with the effectiveness of this email transparency thing, I copied my colleague's response, pasted it into my email, bcc'd the appropriate email list, and hit send.

Within minutes, a colleague who worked on a different team in a different part of the organization replied to me explaining this wasn't quite how things worked. A better response to the user would have been x (he wrote it in a way that would allow me to copy-paste into my next email).

I got that sinking feeling that I messed up. I was sure my colleague thought I was a dummy, that I was bad at my job, and I'd probably get fired soon. In a moment of panic, I thought about forwarding my colleagues original email and showing him that it wasn't me who got it wrong but I stopped myself.

I sent the user a second clarifying email (bcc'ing my colleague because I used his words) and then pinged him to thank him for the feedback. He responded immediately and said (paraphrased) "not your fault at all! we need to do a better job documenting these kinds of changes! That update was made last week and I don't think anyone told the account managers. We're not quite used to having account managers here yet." I felt immediately not only relieved about my performance, but also like my colleague was on my side and wanted to help solve problems with me (not point fingers at me).

It was also the start to a great working relationship with this colleague because in this teeny, tiny interaction, it was quickly established that we were colleagues that could exchange feedback and care.

The fear of colleagues lurking on your work, part 2

To do a good job as an Account Manager supporting many of Stripe's largest users, I had to ramp up on a lot of product and industry knowledge. Payments, Stripe's API, and these particular user integrations were very complex and relied on many deeply technical details. So, I started keeping a log of things I learned in a document called "what Brie learned today." I made the doc public to the company by default.

One of Stripe's earliest and most impactful employees stumbled across the document. He posted into a public channel and said (paraphrased) "awesome idea from Brie to keep track of what she's learning. This can also be a resource for us to consider what's counterintuitive or hard about how things work." Then, lots of other Stripes piled on to say nice things and thank me for keeping such diligent notes. That was a nice moment. And I didn't have to do any icky "managing up" to get it.

The fear of colleagues lurking on your work, part 3

I diligently published notes from my meeting into the company with the subject line "postmortem: $workstream_name." One of the new company leaders pinged soon after. "Thanks for sending those notes; really interesting. Reminder to use the term retrospective instead of postmortem, though. Postmortem is a little morbid."

After I got over the initial tingles of "ugh, I did something wrong," I thought, "wow, this new leader really gets and cares about the culture here. And, he's really paying attention to the details of what's going on at our company. How awesome is that." I said "oops, thanks for the reminder!" and went about my day.

This leader and I bumped into each other in the kitchen on Halloween a few months later and joked that the skull decor was "a little morbid." That interaction felt a lot more authentic and meaningful than an exchange about the weather.

The fear of a complete and detailed record of your work for all to see

My manager asked me to meet her in a conference room at my next free moment. GULP.

One of my clients had emailed her saying that they wanted their account manager (me) replaced. She said that I was unresponsive to her requests and that I wasn't able to navigate the complexities of her integration. I was really frustrated to hear this report on my work, especially because I did not feel like it was an accurate representation of the status of our work together.

I prepared to start defending myself and my work to my manager, but before I could, she assured me that she had already looked through my interactions with this user and did not see any evidence of the user's interpretation of our work together. She cited the quick response times and clear communication directly from my emails. My manager went on to assure me that I was doing a great job and that she did not appreciate users misrepresenting my work through this escalation. She asked if I had any additional context I would like to provide to help prepare her for the conversation she was going to have directly with the user.

I felt deeply, deeply cared for and paid attention to in this moment. And, I think everyone was relieved we didn't have to engage in any kind of he-said-she-said to get to the bottom of what was happening.

True fears I hear company leaders articulate

The fear of upsetting employees

Every leader gets that "I'm worried new-employee Sam will get spooked if I mention this thing that disappointed me during their very first All Hands," pang. (This kind of thinking works for your non-work relationships so you're well trained on it). That's a good time to remind yourself that you hired Sam not only because they're a great accountant, but also because they're a bright, thoughtful, mature team member that can be trusted to understand the nuance and consider the overall health and ambition of the company when they hear your critical evaluation of work. And, if you speak to a challenge with sufficient context and care when you do mention that thing at All Hands, they might even get inspired to help play a role in solving it.

The fear of distracting employees

Every leader gets that knee-jerk "no need to share this with Alex in Marketing just yet" instinct. That's a good time to remind yourself that your best employees aren't nosy or lacking trust in their teammates. They're inquisitive and context-seeking because they want to do what's best for the whole company, not just themselves or their team.

The fear of the information firehose

Every leader of an open-sourced-internally company (and even somewhat-open-sourced-internally companies) get feedback about the "information firehose around here!" You can remind yourself (and the person that gave you that feedback) that human brains are really, really good at parsing information and pattern matching across lots and lots of information. Plus, there are tons of tools and resources that help people manage their inboxes effectively. And lastly, that the benefits of sharing far outweigh the tradeoffs.

How can we do layoffs humanely?

“You can take somebody’s job, but you don’t have to take their dignity.” –Ben Horowitz

No leaders ever wants to do layoffs–it an excruciatingly painful act–but do yourself a favor and do a great job at it. Aspire to look back at how it went down, and be proud of yourself and your team for how you conducted yourselves and treated others.

The key do doing a great job is being extremely prepared. Here are some tips on how to get there.

Much of what you'll read about is based on my experience working with a small handful of companies through their layoffs, talking to a few dozen employees who were impacted by layoffs (as survivors and departures), and reading as much as I could find on the topic (this episode of a16z's Boss Talk was especially helpful). If you have to do layoffs, make sure you have a professional People and Human Resources person involved–this is a thing you want to do by the books, and there are legalities and edge-cases to consider.

Principles

No mess! Move everything in the direction of stability: when layoffs happen, you are injecting a tornado of instability into everyone's lives. As soon as the news is out, it is your job to answer as many questions as you can, as quickly as you can, without creating any new ones. Do not create a shit show. Do not communicate anything unless there is a clear plan of action (for everyone!) to go with it.

Everyone is just thinking, "what happens to me now": Everything you do should be aimed at answering that question as clearly and thoroughly as possible.

Strive for clarity, warmth, and consistency in all communication: have a plan and a message, stick to it, with empathy. And, help anyone who will have to communicate from a position of authority about this (HR, People Ops, Managers, leaders, etc.) do the same.

CEO is DRI: you should be closely in the loop the final decision-maker on everything related to these layoffs. Do not outsource this, especially delivering the news, to anyone else. You are the moral authority and your company and the decisions you will make in this scenario are moral ones. Whether you are a peacetime or a wartime CEO, you have an obligation to your team on this.

Keep the working group very small and the planning window short: getting this right requires a lot of work and planning, and you'll need to enlist additional support to get you there in a reasonable time frame. Figure out the minimum number of people and time required to get this right. Everyone on the working team should be deeply trusted–this news cannot leak to the broader team or chaos will ensue.

Run of show is the most important artifact: The run of show answers the question of who is told what, when. You'll want to have this scheduled down to the ~minute to maximize stability and clarity for everyone. This is the most important artifact you'll create and all other artifacts will stem from your choices here (more on this later).

In very broad brushstrokes, this will include: global all hands, internal comms out (cut by next steps), external comms out, 1:1 meetings with departed individuals, something for the surviving team

Reminder that this probably starts at t-1 day, but it probably doesn't end for another few months when the dust will have settled

Master the choreography: you only get one chance to do this right, everyone must be prepared to hit their marks with extreme precision. Do whatever you need to do to be perfect day-of.

Respect for the people leaving: if that doesn't feel like an immediate priority, remember that these are the close friends and colleagues of many of the people that are staying and they are watching (very closely) how you treat them.

As generous a severance package as you can: think of this as creating a cushion to help people absorb this news and figure out next steps.

Get information into inboxes ASAP: once the news is shared, it's going to send minds spinning and tummy's turning in a way that it's going to make it difficult (read: impossible) for information to be absorbed. Get the details into inboxes ASAP so that people can process the information they need that's going to get them to stability when they're ready.

Your internal comms = your external comms: people are going to talk about this stuff outside of your company. expect leaks, screenshots, and recordings. make it something you'd be proud to have out there.

Trust that everyone will behave maturely, but be prepared for the event that they don't: don't contribute to environment of more mistrust at a time when trust is so important by doing things like cutting off Slack access immediately or proverbially sending security to their desks to pack up. But, be prepared with escalation paths (ex- rules for shutting off Slack access or) in the event that

Other tips, reminders, and gotchas:

Use a codename for the working group/their plans: if 'layoffs' is seen on any doc, anywhere, by anyone, it'll make a big ol' mess.

Those involved in the plans have much more time to process: so remember that your employees are probably several weeks behind you and anyone on the working team in processing this news

Looping under-performers in: if there are people you were likely going to fire anyway, it's okay to loop them in, but make sure there is a way to fit them into the broader narrative (ie- don't say you're only letting go of people level 2's and below and then have a few level 3's and 4's sprinkled in).

Otherwise, you'll introduce more skepticism and mistrust about the whole thing, and shake the trust of the people you need it from.

Think and prepare in timing blocks: What will happen to whom over the next 24 hours, week, month, quarter, and year?

Think and prepare in user buckets: The first cut is likely staying vs. going. But from there, there may be other cuts you need to make that defines what their future over those time blocks will look like. Make sure you have the run-of-show flow that takes into account each of these buckets.

Everyone impacted should get an individual meeting: up to you whether this is before or after the global message, but make sure every departing team member is talking to someone (most likely a company leader or their manager directly). Make sure it's someone they have a real working relationship with (ie–don't just outsource this to HR).

There should be a global announcement: probably by calling an emergency live All Hands. Be sensitive of timezones for that announcement and the All Hands itself–you want to maximize attendance.

All synchronous comms should be paired with async comms: Even if you schedule at the right time, people will miss to be sure to be prepared with your tandem async comms. Also, people will not catch or process everything live.

Thursday is a good day for your announcement: that way, you have ~a day to dedicate to departing employees, a day to surviving employees, and then the weekend for people to collect themselves without having to be at work (and, lowering the surface area for gossiping/swirling since people are less likely to be at their computers). I've seen some companies give the following Monday off, too.

Keep any synchronous comms brief: you want to lower the surface area for potential fumbles and people won't be able to process much information anyway.

If you can scalably help place people find their next role, do it: whether it's compiling a list to make public to companies that are hiring, offering to do reference calls, or making intros. Make that opt-in, though! And don't over-promise!

The gossip will start immediately: everyone will start pinging and calling each other like crazy. That's to be expected and also okay–it's how people process. Help them tell the story of what's happening those. Otherwise, they'll speculate and make it up themselves.

Have eyes on Slack: make this someone's job day-of. and, provide them with clear escalation paths/empower them to take action.

First priority is departures, then it must shift quickly to survivors:

(Optional) Office hours for leaders: if you want your door to be open for people that want to talk, say so.

List of materials to prep (with owners):

**Run of show: remember that this should cover all of your impact buckets

Escalation paths: things that could go wrong, and what to do if they do (internally and externally)

Internal comms plan: departing and surviving

Script/talking points for managers: who are going to talk to their teams who they have the direct relationships with and are also probably fearing for their own jobs and company's future

External comms plan: blog post, twitter comms, CEO statement, etc.

Talking points for employees to use externally: like how to explain this to outsiders, how to show up on Twitter, what to say if reporters reach other

Prioritize leader energy levels/mental health by:

Practicing your comms/delivery: by the time you share the news, you should be able to deliver it without thinking. You're probably going to have an overflow of emotions, day-of, and you don't want that to get in the way of the things your team needs from you.

Scheduling regular breaks from meetings for leaders: they may need to respond to escalations or make game-time decisions, and you don't want them tied up in meetings or needing to text/type while they are in important meetings with others.

Making sure you're eating/hydrating: if that means having meals prepped or food deliveries scheduled, do it.

Scheduling a 'breather' after global All Hands for CEO: it's emotional. make sure you have time to collect yourself (take a walk, go outside, grab a coffee, hug a loved one), so you are emotionally and mentally prepared to face the rest of what's ahead.

Schedule time with a loved one that evening: It's going to be a hard day. Plan to spend time around someone that loves you and cares about you.

Being prepared for an influx of outreach from outsiders: you might want to have some canned responses prepared so that you can respond quickly/without much thought and stay focused don your team.

Themes/talking points that work

Extensive gratitude: say thank you to everyone (those leaving and staying)

Clarifying you did not make this decision lightly: "While the decision around this course of action wasn't easy, it is a deliberate step to ensure we are able to continue delivering on our strategic goals and furthering our mission."

(If it's generous) Communicating the broad brushstrokes of the severance deal with surviving team members: so they know you're treating them well

Offering external talking points: "If you are looking for support or verbiage to this to people in your broader community, messaging [doc you prepared]"

Reminding each other to treat each other specially kindly today: "Remember that everyone processes differently. Be gentle with your colleagues and careful not to impose your style of processing onto anyone else."

Taking it one step at a time: "Our priority to day is to take care of the colleagues that are departing. In the days and weeks that come, we are going to be shifting our focus onto the team that's staying. We know you have questions, but sit tight. We'll get there shortly."

Acknowledging survivors guilt: people are losing close friends and colleagues in the process and will likely be worried about the rift it could create in their ongoing relationships

Themes/talking points that don't work:

Note: I know that a lot of these approaches are invoked with the best intentions, but trust me, they do not land.

Making it about you: emphasizing/sticking too long on how hard it is for you to do this, focus on your team and what's in store for them

Esoteric terminology: do not use weird words or corporate phrasing like "reduction in force," call it what it is

Too much optimism too soon: you don't have to mope around, but it's going to take some time before the team is ready for a dose of cheery optimism

Burying the lede: get to the point fast, a meandering wind-up is going to make people squirm and start to freak out

Taking responsibility: do not blame others, the market, or other factors out of your control (even if that's the true source)

Celebrating victories that got you here: no one needs a reminder about everything great you did or how impressive your metrics are right now, give it a beat

Announcing other stuff with it: product releases, user news, promotions, etc. Wait.

Too apologetic and emotional: you don't have to be a robot, but their future is in your hands and you need to be a beacon of stability

Too nostalgic: ultimately, this is a forward-looking decision, so keep your eyes and your comms on what's ahead, not behind

Dedicating majority of airtime to future plans with your departing team in the audience: save the details for comms with your surviving team alone

"This is a blessing in disguise."

"This should serve a wake-up call that we need to always stay true to our mission and our strategy, and stay lean as we do it."

"We have a ton of money in the bank and are well-positioned to go full-steam ahead with the remaining team."

How can we do layoffs humanely? (The free version)

This week, I wrote about how to do human layoffs for the paid newsletter. Because this is such an important topic that, unfortunately, will probably be relevant to more and more companies in our community, I decided to publish a free version here.

"You can take somebody's job, but you don't have to take their dignity." –Ben Horowitz

No leaders ever wants to do layoffs–it an excruciatingly painful act–but do yourself a favor and do a great job at it. Aspire to look back at how it went down, and be proud of yourself and your team for how you conducted yourselves and treated others.

The key do doing a great job is being extremely prepared. Here are some tips on how to get there.

Much of what you'll read about is based on my experience working with a small handful of companies through their layoffs, talking to a few dozen employees who were impacted by layoffs (as survivors and departures), and reading as much as I could find on the topic (this episode of a16z's Boss Talk was especially helpful). If you have to do layoffs, make sure you have a professional People and Human Resources person involved–this is a thing you want to do by the books, and there are legalities and edge-cases to consider.

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Principles

No mess! Move everything in the direction of stability: when layoffs happen, you are injecting a tornado of instability into everyone's lives. As soon as the news is out, it is your job to answer as many questions as you can, as quickly as you can, without creating any new ones. Do not create a shit show. Do not communicate anything unless there is a clear plan of action (for everyone!) to go with it.

Everyone is just thinking, "what happens to me now": Everything you do should be aimed at answering that question as clearly and thoroughly as possible.

Strive for clarity, warmth, and consistency in all communication: have a plan and a message, stick to it, with empathy. And, help anyone who will have to communicate from a position of authority about this (HR, People Ops, Managers, leaders, etc.) do the same.

CEO is DRI: you should be closely in the loop the final decision-maker on everything related to these layoffs. Do not outsource this, especially delivering the news, to anyone else. You are the moral authority and your company and the decisions you will make in this scenario are moral ones. Whether you are a peacetime or a wartime CEO, you have an obligation to your team on this.

Keep the working group very small and the planning window short: getting this right requires a lot of work and planning, and you'll need to enlist additional support to get you there in a reasonable time frame. Figure out the minimum number of people and time required to get this right. Everyone on the working team should be deeply trusted–this news cannot leak to the broader team or chaos will ensue.

Run of show is the most important artifact: The run of show answers the question of who is told what, when. You'll want to have this scheduled down to the ~minute to maximize stability and clarity for everyone. This is the most important artifact you'll create and all other artifacts will stem from your choices here (more on this later).

In very broad brushstrokes, this will include: global all hands, internal comms out (cut by next steps), external comms out, 1:1 meetings with departed individuals, something for the surviving team

Reminder that this probably starts at t-1 day, but it probably doesn't end for another few months when the dust will have settled

Master the choreography: you only get one chance to do this right, everyone must be prepared to hit their marks with extreme precision. Do whatever you need to do to be perfect day-of.

Respect for the people leaving: if that doesn't feel like an immediate priority, remember that these are the close friends and colleagues of many of the people that are staying and they are watching (very closely) how you treat them.

As generous a severance package as you can: think of this as creating a cushion to help people absorb this news and figure out next steps.

Get information into inboxes ASAP: once the news is shared, it's going to send minds spinning and tummy's turning in a way that it's going to make it difficult (read: impossible) for information to be absorbed. Get the details into inboxes ASAP so that people can process the information they need that's going to get them to stability when they're ready.

Your internal comms = your external comms: people are going to talk about this stuff outside of your company. expect leaks, screenshots, and recordings. make it something you'd be proud to have out there.

Trust that everyone will behave maturely, but be prepared for the event that they don't: don't contribute to environment of more mistrust at a time when trust is so important by doing things like cutting off Slack access immediately or proverbially sending security to their desks to pack up. But, be prepared with escalation paths (ex- rules for shutting off Slack access or) in the event that

List of materials to prep (with owners):

**Run of show: remember that this should cover all of your impact buckets

Escalation paths: things that could go wrong, and what to do if they do (internally and externally)

Internal comms plan: departing and surviving

Script/talking points for managers: who are going to talk to their teams who they have the direct relationships with and are also probably fearing for their own jobs and company's future

External comms plan: blog post, twitter comms, CEO statement, etc.

Talking points for employees to use externally: like how to explain this to outsiders, how to show up on Twitter, what to say if reporters reach other

Prioritize leader energy levels/mental health by:

Practicing your comms/delivery: by the time you share the news, you should be able to deliver it without thinking. You're probably going to have an overflow of emotions, day-of, and you don't want that to get in the way of the things your team needs from you.

Scheduling regular breaks from meetings for leaders: they may need to respond to escalations or make game-time decisions, and you don't want them tied up in meetings or needing to text/type while they are in important meetings with others.

Making sure you're eating/hydrating: if that means having meals prepped or food deliveries scheduled, do it.

Scheduling a 'breather' after global All Hands for CEO: it's emotional. make sure you have time to collect yourself (take a walk, go outside, grab a coffee, hug a loved one), so you are emotionally and mentally prepared to face the rest of what's ahead.

Schedule time with a loved one that evening: It's going to be a hard day. Plan to spend time around someone that loves you and cares about you.

Being prepared for an influx of outreach from outsiders: you might want to have some canned responses prepared so that you can respond quickly/without much thought and stay focused don your team.

Check out the paid version for:

Other tips, reminders, and gotchas: like using a codename, how to loop underperformers in to your departure list, how to run your all hands and follow-up comms, how to deal with the inevitable swirl of gossip, and more

Themes and talking points that work: like ""Our priority to day is to take care of the colleagues that are departing. In the days and weeks that come, we are going to be shifting our focus onto the team that's staying. We know you have questions, but sit tight. We'll get there shortly."

Themes and talking points that don't work: like "this is a blessing in disguise"

Tactic Spotlight: Code Red

What is it? A prescribed process for making a meaningful strategic shift right now

When to invoke it? When shit's hitting the fan for one reason or another and you want to acknowledge that on the company stage (and help people understand that other stuff they are likely working on will need to be immediately deprioritized to make room for this).

For example:

Stripe invoked a code red in 2015 when the core API was revealing some serious instability. It was all hands on deck to fix it (everyone from engineers to account managers)!

The Financial Services AdWords Sales Team at Google invoked a Code Red when we discovered some bad actor accounts that we wanted to immediately offboard (mostly for ethical reasons). We were all asked to work extra hours and put some account-facing work on hold to do the work to get things into a better place.

Other examples of external triggers for a Code Red: massive regulatory change like Brexit, global pandemic like COVID-19, or a market decline like the one we're facing.

Other examples of internal triggers for a Code Red: CSAT scores at sustained lows, sustained low offer to accept rate for candidates, large sales deals keep getting lost to the same competitor

Tips:

Different from incidents: in that it will require a meaningful strategic shift and ongoing, albeit timebound, dedicated work to resolve.

Disruptive to the organization and roadmap by design. The whole point is that everyone at the organization knows that if they are asked to work on something related to Code Red, they drop their current work to help.

Staff strategically: such that this Code Red does not cause a Code Red elsewhere. For example, you wouldn’t want to take all of your reliability or security engineers off their work at the same time.

Give it a descriptive and distinct name: that everyone can refer to the Code Red by. Having shared language/terminology will not only make communicating more efficient, it will also make the team feel more connected spiritually.

Communicate progress often: not only to direct stakeholders but also the broader organization. Everyone should know how to help.

You can do a lighter version of this for a “Code Yellow”

If you’re experiencing a lot of these, there has likely been a failure in planning.

Proposed entrance criteria

called by a leader

job to be done is urgent and requires cross-functional support

Willing to staff this with 100% of 3-5 people (and some yet-to-be-determined amount of crossfunctional time)

Willing to put top talent on it

Clearly-defined exit criteria

Requires at least 30 days to resolve

Proposed operating criteria

Leadership sponsor is available in real-time to quickly steer, unblock, evaluate crossfunctional staffing requests, and make decisions with the working group

Target timeline for resolution

Dedicated directly responsible individual who owns the outcomes and ongoing communication

A broadcast channel and agreed-upon update cadence

100% staffing from core working group and authority to request staffing from other teams as needed (subject to approval of leadership sponsor)

Proposed Exit Criteria

Must be defined at outset

Ongoing ownership established (closed out permanently, gets owned by other team, spins off into its own ongoing function, ends before it’s completed)

Template

snapshot below, put it to use

How can I build trust with new employees fast?

I really love this question–trust is the right thing to orient and optimize at the start of a new working relationship. But, how to wrangle this squishy concept into a set of practices and norms to help you get there? (You know this is my favorite thing!)

Here are some hopefully-helpful considerations (and metaphors/resources) to keep in mind and then a favorite tactic (that I've stolen with pride from a very talented, smart, and effective friend who managers a team of similarly talented, smart, and effective people).

Trust is a big deal word: We all want to be trustworthy and able to trust others. Which is why when things start slipping from the trust zone, it can get the tummy turning and mind spinning for everyone involved. We should listen to that feeling and then use it to fuel some action-oriented paths towards moving into the trust place.

Passing your interview process should create a foundation of trust: if it doesn't (ie- you're still skeptical of people once they've entered the building), you should revisit your interview process.

Accepting that "defaulting to trust" just might not work: We like the idea of defaulting to trust (or "assuming positive intent")–maybe it's even part of your operating principles–but isn't it also true that trust should be actively cultivated and maintained? And isn't it true that trust can be lost over time? Maybe even more quickly than it's earned? I really, really like this post by Will Larson on the topic. In it he states, "occasionally, I've had folks push back on me inspecting their work, arguing that I should just trust them. This is a short-term perspective, and in my case has always been a reflection of a deeper relationship challenge between me and the individual I was working with." I bet that resonates :)

Answering the question, what can someone do at your company to engender trust? (With full acknowledgment that it's probably context and person and workstream dependent) you should be able to come up with some tactical answers for this. Maybe it's bringing the data or user feedback to discussions. Maybe it's sharing a lot of context and showing your work about how you arrived at the current state. Maybe it's writing a brief before you start doing something or weekly status updates. Whatever it is, figure out what it is for you, dear leader, that makes you feel you can trust things are on-track, and articulate it.

Invoking an inspection tool <> micro-management: Will's post poses the term 'inspection tools' to talk about ways that you can work with colleagues to charge the trust battery. It's important to remind your colleagues and reports that engaging in these inspection tools is not micro-management. It is about mutual trust-building and they should be on board for this both philosophically and tactically.

Note: if they are not on board philosophically, that (to me) is a red flag. If they aren't on board tactically, you might want to work together to find a tactic that will work. Ultimately, as the company leader, it is your decision about how work comes to you).

Orienting inspection around moments of decision-making: Trust is comprised of many, many, many factors (some that we probably can't even articulate) and this can make answering ^ rather overwhelming. One very productive way to simplify this (and move trust-building into a tactical/process-driven place instead of an emotional one), is to look at decision-making. In the company setting, trust really comes down to whether you believe someone else is exercising good judgement to make good decisions. It's way easier to focus on inspecting and communicating about decision-making than it is to wrangle the big hairy wiggly trust monster.

Metaphors/messaging that works

"Trust batteries" This concept comes from Shopify founder, Tobias Lütke, and I have found it to be an incredibly helpful metaphor (that everyone can get behind). In his words, "people sort of think about trust as almost an on/off kind of thing...But, it's really a gradient." He goes on to explain (in not these words) how certain actions/decisions/behaviors are trust-generating and others are trust-diminishing. The goal for collaborative relationships is to keep charging the trust battery.

"Both hands on the baton": I've seen this metaphor work well for messaging a need for inspection tools. Remind your new team member that you are very enthusiastic about them taking over this work (that's why you hired them!) and doing it their way, but you'd like to spend some time together to share context and make sure you're both mutually satisfied with the new way of doing things before you fully relinquish your role. You can say some like "there is going to be some period of time where we are both going to have our hands on this baton. We both want the same thing–for me to let go so you can sprint with it–so our shared goal over the next few months is to get to that place."

"Decision-making training periods": Similar to ^, you can consider the early days working with someone as a way to train them up on how decisions are made in their new context. You can remind your new hire that you know they are experts in their field with a proven track record of success (that's why you hired them!), but that there are always quirks bringing that to a new context. Your goal is to work with them to most efficiently and effectively bring what they know works outside your company walls to what will work inside of it. Once they're sufficiently trained up, you'll delurk!

"The goal is to push decision-making down into the organization": This one I took from Stripe's then-COO Claire Hughes-Johnson. She was constantly reminding the other company leaders that it was their job to 'push decision-making down into the org.' In other words, encourage distributed decision-making (with sufficient belief that they are making decisions in the right direction).

My favorite tactic: Decision Matrices

The structure is pretty simple. Pose the question you are trying to answer/decision you are trying to make. Create a table where the columns are possible answers/decisions and the rows are factors/criteria.

Then, weight the criteria. Then, color-code each option. Then, articulate your recommendation.

What I like about this tactic is that it's not only about getting to the right decision, but also a vehicle for directing a line of inquiry into specific aspects of decision-making process. This will encourage mutual learning about the underpinnings and biases of each other's decisions in a way that makes talking about them, and course-correcting, a whole lot easier.

Here's an example of what it could look like. Template here.

As you'll see, this makes it really easy to talk through criteria (anything missing?), weights (something weighted too heavily? not heavy enough?) and direct questions into how criteria is met/not (why is this green and this yellow?).

Tactic Spotlight: Guilds/Braintrusts

What is it? A group of people who are formally appointed to consult the broader organization on a topic.

When to invoke it? As a way to uphold/raise the quality bar for work across the organization. And, as a way to recognize employees who are truly spectacular at a thing you value and help them build community around their proclivities. You can think about these as a version of ERG's (employee resource groups), but the thing the group connects over is focused on the work.

For example:

At Stripe, a group of 'red pens' could be consulted on writing (blog posts, internal memos, product writing, etc.)

At Reddit, employees organized into topic-focused “guilds” (ex- ML, Kubernetes, Frontend) that met every two weeks. The goal of the meeting was to broadcast learnings/best practices and get early feedback on ideas/projects.

At Pixar, when a director or producer feels like they need some fresh ideas or feedback, they convene their “brain trust” (a group of other directors/producers and anyone else they think would be valuable) and show the current work-in-progress version of what they’re working on. What follows is a lively two-hour give-and-take discussion. It’s all focused on making the movie better. No ego, no politeness, just ideas.

I recently talked with a founder about appointing a group of 'taste buds' at her organization that could be consulted on anything that requires that extra touch of something special (swag, office decor,

Tips:

Employees will feel honored that you recognize them for this special quality. When you appoint someone, tell them specifically why you choose them to do this work.

The appointments can be informal (ie- a Slack ping to get feedback) or formal (ie- calling a meeting with trusted individuals) and the group can (and probably should) rotate.

The expectation is probably that they spend 10-20% of their time (read: 110-120% of their time) on this, so make sure to confirm with managers that they are already nailing their core role before you staff them on additional work.

Tell the broader organization who these people are and how to engage with them.

Don't worry too much about teeing up the infrastructure for these groups the function. The people in these groups should be trusted to self-organize about how to route work and build community amongst themselves in a way that works best for their particular group.

Consider offering budget to create some kind of badge/artifact that not only signals to the org who they are, but also builds aspirational community around these groups–a particular emoji to add to their Slack name/bio, something for desks, special swag (pins are good for this!).

How should we deal with employee departures?

How you treat employees on the way out says a lot about the integrity of the leaders and the company. The most important thing is that dignity remains in tact across the board, no matter the circumstances of the departure. This is important for the departing employee but it's really important for the employees remaining. Sometimes, those things are in tension with one another, so here are some things to think about.

Overall guidance

Be as transparent as possible. Say when you can't say.

Once one person knows about a departure, everyone knows.

Have an exit interview. Don't just put that material in the paper shredder.

Be forward-looking.

Define the norm that everyone should sick to it in ~all cases. Is a note to everyone appropriate? A note to some people? Who sends it? Are they names of employees that have departed listed somewhere?

If the employee decided to leave

ensure the employee is leaving their work in a good place

align on the appropriate timeline for telling others (once one person knows, everyone does)

remain positive and support continued success for employee

celebrate their accomplishments! If the person did great work, it is worth acknowledging even when things are bittersweet.

If you decide the employee must leave (performance)

Remember, employees talk to their colleagues and it will reassure existing employees that the company is fair if this is done well.

Go above and beyond to make this as easy and kind to the employee. Take the high road on every vector. Give as much severance as possible, be as kind and flexible as possible. In the long run the few paychecks given to the employee is not a big deal for the company and could impact the employee greatly

Align with the employee on narrative, timing, and comms to the broader group.

Let employee decide who they will tell and how they will tell them (i.e. let them have the choice that they don't have to let their team know they were fired). This only benefits the company, the company doesn't look mean, employees will be happier. People are not dumb and know things happened but it makes the company look better if they take the high road.

If you decide the employee must leave (ethics)

Let the company know what behavior was unacceptable and how seriously you take it. Focus on the content of the ethical breach/not the person.

Tactic Spotlight: Incident Response Runbook

What is it? A clearly-defined process for responding to something meaningfully broken for users

When to invoke it? Set up this process before you think you need it and be committed to evolving it over time as you learn more and increase the complexity of your systems.

For example

The FAA's Dirty Dozen refers to the twelve most common human error conditions that lead to accidents or incidents. The list was developed in 1993 by Gordon Dupont with the goal of raising awareness about the role of human error in flying accidents and incidents. According to the FAA, 80% of maintenance mistakes involve human factors that if weren't detected would lead to accidents.

Within 24 hours of one of Figma's most disruptive incidents to-date, the company shared a blog post explaining "while there is still more work to be done to ensure we've learned everything we can from this incident, we want to share details about what happened and what we did to resolve it." Even the most heavily-impacted customers thanked the team for being so thoughtful and rigorous in their investigations and communications.

At Stripe, I was surprised to hear an Account Management candidate tell me that she asked many team members to share a good memory with colleagues (cool question IMO!) and many people on the team cited the outage period. I think I know why–when the process of getting to and communicating resolution is clear, it can be a wonderful moment of cohesion and clarity of shared goals. When teammates treat each other well in these high-stress moments, high-intensity moments, it'll build trust that lasts a lifetime.

The Runbook

Step 1: Incident opened

Owner: anyone at the company

Everyone at the company should feel empowered to open an incident. It's better to be uncertain and open, than rigorously evaluated and not-open; the cost/minute of not opening is very high if there's a real incident occurring

No punishment for being wrong in opening an incident (okay to be paranoid/trigger happy)

Step 2: Response classification (and remediation owner appointed).

Owner: evaluation owner

This might also be the time that you decide to close the incident (because they was a false flag)

Goal: fix it ASAP (faster to fix, the less likely sustained negative impact for users and company)

Non-goals: Evaluating impact to business, Get longterm solutions in place (both punted to later)

Step 3: Incident remediations (including team assembly and stakeholder updates)

Owner: Incident owner

should likely be categorized and tracked according to severity. Two helpful delineations could be 1/ big vs small threat to company and 2/user-facing vs non-user-facing

The actual tactics and team will, of course, depend entirely on what's going on

Step 4: Retrospective

Owner: neutral third party

Goals: Understand impact to the business, Contextualize this incident within other incidents; any trends? Decide on whether any additional/ longterm fixes are necessary (and when) and, if yes, who will staff them

Non-goal: catastrophize doomsday scenarios ("how bad it could have been")

Step 5: Long-term fix implementation (or not)

Owner: context-dependent

Goal is to decrease the likelihood of future incidents (to be balanced with competing priorities of non-infra work)

Tips:

Set up this process before you think you need it and be committed to evolving it over time as you learn more and increase the complexity of your systems.

Incidents are almost always the result of inevitable human errors. It's critical to your company's culture that incidents are treated as failures of teams and systems, not individuals. If you don't do this, it will be harder for individuals to pipe up and harder for the organization to understand and implement the systemic changes that will be more successful in preventing these in the future.

There will almost certainly be a temptation to implement fixes that make one-time incidents less likely, but the day-to-day work more toilsome. Find solutions with balance.

Open up a "war room" (both digital and physical space) that is a dedicated space for all communication regarding the incident.

Disseminate learnings broadly so that the entire company benefit from them, making the same mistake is less likely to occur next time.

How do we help our team embrace the DRI concept?

DRI stands for directly-responsible individual, and I have observed this to be a key feature of a high-performing team.

Benefits of the DRI system

A cultural declaration about ownership and accountability: this is a sign to the organization that you don't just care about ownership in the abstract, you care about in practice.

Forces the organization to think and work in discrete workstreams: since DRI's must own clearly-defined units of work, the DRI system becomes a forcing-function for effectively slicing work up into smaller pieces.

Cleaner interfaces for the rest of the work: one way to think about a DRI is the human API to name-your-workstream. When everyone at the organization knows who the go-to for the project is, the overhead of figuring out who to go to about the work.

Run orthogonal to org structures: DRI structures don't need to mimic org structures, which allows teams to be more nimble and self-reliant.

Work moves faster: When work is broken up into smaller, shippable, unblocked units, and is owned by someone whose performance is evaluated on the success of that work, work simply moves faster.

Better work product: when someone's name is on something, they are more motivated to make it great.

A professional development mechanism: organizations can also use the DRI system to help develop their talent. By helping team members own workstreams of different flavors and increasing degrees of complexity, you can grow your talent.

Getting it right

Formalize the roll-out: talk about this norm with your team. build documentation around it and publish it on your wiki. Ensure managers understand the ask so they can support their team members. Assign DRIs to existing work, request DRIs on upcoming work, and document that somewhere.

Not a micro-management mechanism: It's critical that everyone at your organization understands how this is norm is autonomy-maximizing, not autonomy-minimizing.

Clearly scope DRI purview: down to the outcomes, contributors, projects and tasks. Clearly articulate what those are.

Clear principles for DRI selection: what qualifies someone to be the DRI of this workstream? Is that clear to the broader project team and are they on board? If not, how can you get them there?

Clear principles for DRI evaluation: performance for those leading workstreams (just like teams or organizations) cannot go unchecked. This is particularly easy to overlook because DRIs often run orthogonal to org structures–so, evaluating their performance will require someone else (probably their manager) to be particular motivated and inquisitive to fact-find across people outside of their team, org, or skillset.

The combination of ^ instills trust in the system.

Plan DRI can be different than execution DRI: The DRI can, but doesn't have to, shift when a project is going from strategy mode to execution mode.

This is not a fuzzy title: When a DRI is assigned, publish it on the project docs. This is a forcing function for making DRIs a relatively official title. It will also help anyone lurking on the project know who to go to.

Low-performing DRIs will crush project teams: keep an eye out for these! Regularly ask project stakeholders and participants how they think things are going.

Give DRIs reporting responsibilities: This is good project hygiene anyway , but more critically, it helps manage performance (for both recipients of the project updates and project participants who will have an artifact to point to to represent the ways their experience of the project jives or doesn't with the DRI's account).

No going around the DRI: one cool thing about DRI's is that they don't have to fit neatly in the org structure (ie-the project DRI doesn't need to be the manager of all–or, any–of the project contributors). But, if the broader team, especially company leaders, circumvent the DRI's and move via org/power/political lines instead, the whole system breaks down.

Tactic Spotlight: Company Fact Sheet

What is it? A set of facts everyone should know about our company

When to invoke it? To establish clarity and consistency in how to talk about the company. This is especially important as the company grows.

Tips

Someone on comms or marketing should likely own this. Sales is a good back up.

Check in on this document every 3-6 months so that it doesn't go stale. Publish updates to the company.

Offer language for different contexts–selling users, talking to recruits, talking about the company with parents, talking about the company at parties with friends.

Ideas for what to include

Founding date (and story)

Product offering (and why you win)

Company stats you're comfortable sharing (and and explicit mention of those you're not)

Business model

Facts about customers

Facts about leaders

Longterm bets

Team qualities and quirks

Exciting company milestones

Template here

Who owns the tooling decisions?

If you've ever had to search for that one piece of information you need in your email, Slack, Coda, Paper, Notion, Airtable, and Google Drive before locating it, or landed a "canonical document" only to realize the page hasn't been updated for over a year, you know why this is such an important question. Then, there's the set of stuff you don't know you need to know to go looking for. (I've been hearing stories of employees at 30-person companies that learn about something launching from their own company's blog).

I'm glad you want to spare your team members from that wasted time and frustration.

The documentation sprawl question is also a distribution question, and doing a great job means getting prescriptive about both.

Companies can, and should, be more opinionated about this than they think. I know, I know. Your product team loves Airtable and your marketers love Notion. It's okay, you can make this decision for the company and then encourage org/team leaders to drill down into how to make the tool work for everyone in their corner of the organization. You wouldn't encourage everyone to use Slack and Hipchat and GChat, would you?

The tooling sprawl question is also a distribution question.

This typically leads to the conclusion that papertrail norms can be left to the working group while curations norms should be prescribed by the company (since they have the audience of more people around the organization). The benefits can then be realized by document searchers or consumers. If I need to find something canonical, I go straight to Notion versus Paper which I know is for work-in-progress.

When to leave the tool decision up to the working group: Working groups should be able decide what tools will make them most efficient and the decision about tooling for any workstream clearly-owned or driven by a single team should be owned by that team. For example the recruiting team should choose the interview/hiring tools, the support team should choose the user ticketing system, and the people team should choose the performance management and HR systems tools). This is also the case when it's a small, high-trust, high-context group cranking (ie- two coworkers collaborating on a response to a user's email).

A tool can't solve a social problem. Everyone should know what tools to use for what job and act as good stewards of that system/help others do the same. In other words, it should be culturally supported to say "have you documented this and published to Notion so others can reference, too?" What's often overlooked is that the work entails prescribing some communication norms alongside the tooling norms. For example, you should probably have everyone at the company on the same page about when to email vs when to Slack vs when to meet vs when to put something in your ticketing system.

Do we actually need company values?

Yes, yes yes! Good company values are the center of gravity for the company. They crystalize and codify the types of behavior that are exemplified by the very best among you, on your very best days. And, they can bend behavior towards it on your worst days. And, they are particularly helpful in times of broader instability in the world outside the company.

Even if you don't need them, I bet you want them. This is your way to put your stake in the ground about the laws of your little universe you're creating. (And then hire the people that are going to work exceptionally well in that little universe with you).

In my experience, most companies start to explicitly encode and articulate their principles or values too late.

I often get called by founders who are experiencing some kind of cultural breech and wish they had these values in place to point to and explain why the behavior is not acceptable at their company).

I would try to produce a provisional revision literally when you're just a handful of people. Then continue to update it on an ongoing basis, because assuredly there will be things you realize or come to appreciate are wrong over the course of the company.

At Stripe, it would have been impossible to get through the day without hearing them used multiple times. Sound a little cult like? That's good!

Another way to think about company values is a a contract that employees have with each other and for each other.

It's also a shared language anyone can rely on to talk about those things (which are often hard things). They become guiding principles for actions, decision-making, and the ultimate goal your team members hope to achieve, together. Because everyone at the company leans on company values, they also create a shared sense of purpose, standards, goals and break down organization barriers in this process. And, it helps everyone evaluate candidates on whether they are a good fit for the company.

The following statements should be true for a good company value

"I believe that striving to do this will make our work better, and ultimately help our company succeed"

"This is how I will strive to act when I am working with you"

"I want you to act this way with me when you are working with me too"

"When I lose sight of these values, please remind me. I will do the same for you"

When you nail your company values, you'll should see changes like:

FROM: Employee thinks: “I don’t fully agree with $action by $person, but it doesn’t seem like it’s my scope to chime in. I also don’t want to upset them…”

TO: Employee reaches out: “Hey $person, I was wondering if we have considered $principle when making this decision? Would you mind if we chat?”

FROM: $team_a and $team_b can’t align on decision, so decision making was escalated to having a large meeting with many high-ups

TO: $team_a and $team_b collegially debate by invoking $principles, and presented a solution to leaders with $principles

FROM: “This feels off but I don’t want to damage a relationship or ruffle feathers”

TO: Employee feels empowered to start a conversation like “I saw $thing, which seems to not align with $principle.”

If you need help with these, please reach out! It's my favorite thing to work on with companies (at any shape/size).

Tactic Spotlight: User Personas

What is it: An artifact that paints a picture of the different kinds of users you support.

When to invoke it? It's time for everyone (not just your marketing and sales teams) to get crisp about who your users are (and how to prioritize across them).

Company Story: I'll start with my favorite persona example. Her name is Ocean and she's the target customer for Lululemon. She's "a 32-year-old professional single woman who makes $100,000 a year…she is engaged, has her own condo, is traveling, fashionable, has an hour and a half to work out a day." Why these qualities? Then-CEO, Chip Wilson, explains "if you're 20 years old or you're graduating from university, you can't wait to be that woman. If you're 42 years old with a couple children, you wish you had that time back."

Now, imagine you're an employee at Lululemon–maybe you make the leggings or design promotional materials or decorate the shop. Doesn't it give you a pretty clear sense of who to make those things for?

You can do the same for the employees at your company. And, in the process, give people the language they can use to talk about and to these customers when the time comes.

Template: here

All Great Organizations Do

I spend just about all my time reading, thinking, and talking about the qualities and cultures of great organizations. Here's what I've observed the great ones have in common.

An ambitious mission

The best way to make big things happen? Create an environment where big, great things can happen. Better yet, where everyone feels that they must happen.

Tyler Cowen, economist and public intellectual wrote "at critical moments in time, you can raise the aspirations of other people significantly simply by suggesting they do something better or more ambitious than what they might have in mind."

Apple had the same message in their iconic 1997 commercial, the crazy ones. Nike had a similar message, delivered through Colin Kaepernick, football star who became bigger than football when he knelt during the national anthem in protest of racial inequity. "If people say your dreams are crazy, if they laugh at what they think you can do, good. Stay that way... Don't ask if your dreams are crazy. Ask if they're crazy enough."

People want to deliver. They want to do great things. They want to go big together.

A big personality

Great organizations have their own way of doing things.

They're opinionated about how to do things. They have their own particular views of how things should work. They have their own myths and memes; the distinct words, and phrases, and stories, and quirks, and inside jokes that everyone shares. It'd be hard to get through a day without exchanging a few of them. Everyone knows the company lore and newcomers are invited to share in it too.

Those outside the company may point to things employees do and say "typical." They might even describe the company as "a little cult-like." When employees of the company hear they're described this way, they take it on the chin. They may even high five about it under the table.

This shared identity, this strong center of gravity, this magnetic pull to center creates a deep connection to the work and each other. It washes over people in meetings, and hallways, and meals. Everyone, everyone, at the company shares a purpose.

When you create your own myths and memes, make them memorable. Make them yours. They'll carry.

A visceral understanding of users

Picasso said, “when art critics get together they talk about Form and Structure and Meaning. When artists get together they talk about where you can buy cheap turpentine.” Great organizations are obsessed with turpentine.

Turpentine is what is really going on at the one-inch altitude. It’s not the generic, cliched, shape of it observed from 10,000 feet. Even the smartest, most thoughtful, best-intentioned people won’t get it right without the ground-level perspective and visceral sense of what is.

Still not crystal clear on why turpentine matters? Pixar’s research trips are a great example. When making Ratatouille, the entire crew visited restaurant kitchens in Paris to get a feel for them. Ed Catmull credited these trips with the “obsessive specificity” of the kitchen scenes; the sound of clogs on the tiles, how chefs held their arms while chopping, and more. It’s why those scenes feel so real when you see them on the silver screen.

Turpentine makes the product and culture better. Getting neck-deep versus ankle-deep into the minds of users and watering holes of the problem space makes the work more rewarding because employees can feel their impact and hone their instincts for what to put into the world.

The right team for the job

The right person for your organization meets two criteria:

The skills and experience required to do the work

The qualities that allow them to work with the other people at your company to get it done

This is as true for company leaders as it is for individual contributors. It’s as true for engineers as it is for sales people. For those with thirty years of experience as those who are just starting out in their career.

You may be tempted to hire people that have [1] but not [2]. Don’t do it.

The bigger your company gets, the smaller percentage of the employee base you represent and the further away from the average employee you get. Hire the people that render this fact of growth not scary at all.

Fire in the belly

Leonard Bernstein, prolific American composer and humanitarian, said “to achieve great things, two things are needed: a plan and not quite enough time.”

Great organizations are in a hurry to get where they want to go. They desperately want to live in the world they are building towards. But they won’t sacrifice quality to get there.

Default to open-sourced internally

The single greatest benefit of open-sourcing content is that no one has to reinvent work that's already done. Instead, they can focus on moving the entire system forward. And, they have the global context required to make the best decisions for the company, not just themselves.

In 1999, long before the "open-source" ecosystem reached its current form, Bill Gates said "the old saying Knowledge is power sometimes makes people hoard knowledge. They believe that knowledge hoarding makes them indispensable. Power comes not from knowledge kept but from knowledge shared."

At your company, strive for knowledge shared. The assumption should always be that if one person needs to know it, other people will benefit from knowing it, too. It's the best the only way to make the hivemind go buzz.

Meritocratic

If you want your company to succeed, the best ideas must win. This is very difficult to achieve in practice because reason is driven by emotion. Organizations are made up of humans, each with their own interests, experiences, passions, motivations, scars, egos, personalities, and beautiful little quirks.

Great organizations know how to get into the crannies of the organization, bring ideas forward, evaluate them on their merits, and support the great ones. Great ideas can come from anywhere; all roles, tenures, experience levels, backgrounds, perspectives.

There's a phrase (attributed to Leila Janah) that entrepreneurs like to use when talking about building products and teams; "talent is equally distributed, opportunity is not." Think about your organization in the same terms.

Ships product they're proud of

In 1982, the Apple team was hard at work designing and developing the first Macintosh computer. Here's famed engineer Andy Hertzfeld on the topic.

"The Mac team had a complicated set of motivations, but the most unique ingredient was a strong dose of artistic values. First and foremost, Steve Jobs thought of himself as an artist, and he encouraged the design team to think of ourselves that way, too. The goal was never to beat the competition, or to make a lot of money; it was to do the greatest thing possible, or even a little greater. Steve often reinforced the artistic theme; for example, he took the entire team on a field trip in the spring of 1982 to the Louis Comfort Tiffany museum, because Tiffany was an artist who learned how to mass produce his work.Since the Macintosh team were artists, it was only appropriate that we sign our work. Steve came up with the awesome idea of having each team member's signature engraved on the hard tool that molded the plastic case, so our signatures would appear inside the case of every Mac that rolled off the production line. Most customers would never see them, since you needed a special tool to look inside, but we would take pride in knowing that our names were in there, even if no one else knew."Great organizations push for, and expect, extremely high standards of work and help elevate the work of those around them.

Fixes broken windows

Neophilia is a real risk in this town. It's fun to produce shiny things and make a big splash with them. But great organizations value maintenance, too. Everyone knows to clean while they cook. It's not cool to leave the code base a mess or create sloppy documentation.

Intel built an entire operating model based on this concept; the tick-tock model. During 'tick' cycles, everyone was expected to focus on cleanup and optimizations. During 'tock' cycles, the innovation happened. Can't have one without the other.

Forward-looking

When 15-time superbowl champion quarterback Tom Brady was asked which ring was his favorite, he said "the next one."

At great organizations, everyone believes the best days are ahead. It's more than optimism and long-term thinking–it's a refusal to glorify the past in a way that holds them back. Great organizations take pride in what we've built up until now, but hope that one day it will be a very small portion of all the things they've done.

Warm inclusion

Companies bring colleagues together foremost over the work they do together. In great organizations, collaboration is not a burden. It's celebrated.

And not in the "list of thank you's at the bottom of an email" or a "so-and-so has to sign off on this" kind of way. In the real way. The way that's a meaningful exchange of ideas, hard work, support, and care. It's those times where colleagues worked through dinner without noticing and now there's barely enough room on the whiteboard for that final thought but they think they *finally* arrived at the right implementation and they just can't wait to build it together now.

There is a powerful opportunity for companies to become places where people with a wide range of worldviews, experiences, and identities come together to create together.

At great organizations, collaboration isn't just tolerated, it's craved. Everyone knows that their best work won't happen without it.

Features of a great planning process, part 1 (rant included)

Every company has their own process for deciding what to build and how to coordinate across the organization to build it. Whether it comes naturally or is the result of a concerted effort and process, every company plans to achieve the same benefits: focus on the right global priorities, clarity around ownership, coordination wheels greased across shared workstreams, high shipping velocity, visibility on work across the organization, and shared enthusiasm about the direction of the company. Put even more simply, it identifies the right stuff to work on and makes it more satisfying to get it done.

The message I hope you internalize loud and clear is that if we want to unlock all these benefits in our organizations, we need to stop thinking about planning like something that's going to get in our way, and build the process that helps us achieve our wildest dreams together.

/rant Let's stop the collective eye-roll about company planning

For reasons not worth philosophizing about here, we love to hate on "process" in this town. We say that it's corporate and wastes our time and stunts our creativity and bogs us down in meta-work and wraps so much red tape around our organizations that we can't get anything done at all. As soon as the all@ email comes about the new process the company's going to rely on, so do the whispers and pings start flying about it not being 'startup-y' around here anymore. "There goes the neighborhood," employees think and start fantasizing about "going smaller" to roles and companies where they don't have to deal with this "big company bullshit."

I think we can all agree that the process that most reliably provokes these sorts of (not totally unreasonable) temper tantrums is company planning (...and maybe perf too, but that's a topic for another day). And I think I know how we got here. One observation is that most company planning processes aren't actually very good.

They do all those icky things we say they do–make our organizations feel big and clunky and impersonal and add more work and more deadlines for things our users don't directly benefit from. They often, even if inadvertently, shine a light on/create/accelerate politicking (this is one of my all time favorite reads from Ben Horowitz). I've seen many organizations spend months on a planning process that ends up producing nothing but a single moderately-rousing All Hands presentation and a document that no one reads or refers to again. ICK!

And one (perhaps more sentimental) hypothesis is that needing to plan in any formal way forces us to confront the fact that our organization is bigger–and as a result, that the trust and cohesion and clarity and lines of ownership that came so easily in the good old days, just isn't flowing by osmosis anymore. Admitting that these things are starting to get a little fuzzier also means committing to putting work into a whole pile of things we used to get for free… and we just want to build great stuff with people I respect…and we're already exhausted from the work required to do that.

But I'm here to stick up for planning done right. And it starts with you, dear leaders, not whispering about how much it sucks. Be the change!

Bringing planning to your organization, principles to keep in mind

Everyone plans differently. Planning and resourcing processes have a broad range of features and there are many ways to get it right (and wrong). They can be founder-driven or generated bottoms-up, built around a central tool or no tool at all, orient towards metrics or themes, look a decade ahead or 2 weeks ahead, take 6 months to get right or a week, generate some nice prose or a swath of Linear tickets. Design a process that works for your team at your phase. Elon generated Tesla's Master Plan (and made it public), Intel (and then Google/Apple) relied on Andy Grove's OKR process (short for Objectives and Key Results, John Doerr's book Measure What Matters provides the full run-through), Amazon 'works backwards' from Press Releases and Narratives (this conversation between Sonal Choski and book author's Colin Bryar and Bill Carr is a must-listen if you want a primer on the topic), Airbnb and Eventbrite use the 'W Framework' (outlined here by Lenny Rachitsky before his hit newsletter was a twinkle in our eyes), Salesforce (and then Atlassian) use V2MOM (an acronym for Vision, Values, Methods, Obstacles, and Measures).

The team that owns planning will dictate the flavor of the plan. If someone on finance owns planning, plans will likely orient towards achieving longterm business outcomes. If it's someone on product owns planning, plans will likely orient towards major product ships. At Stripe, our BizOps team was the first owners for company planning. I think this was a great place to start because BizOps is almost always politically neutral, has already established working relationships with many teams across the organization, and has the crossfuntional operational muscle to do this flavor of work.

The process should evolve ~every cycle: Your planning process should evolve with your company (and will likely increase in complexity over time). If your organization is growing quickly, you can expect to adjust your planning process nearly every cycle. In my experience, larger companies are generally happier with their planning process than smaller ones. I think this mostly relates to the organizational muscle required to do it well and the lack of resistance from larger teams about needing it in the first place

Centralized metrics can solve for a lot. If deciding what themes/workstreams matter most is feeling overwhelming, start with metrics the company should care about. Have some beyond the obvious revenue/profit/growth stuff. Stripe company metrics around startup penetration and operating leverage (the numbers were a little made-up but the cultural focus it instilled was incredibly impactful). Make sure to assign owners (or sets of owners) for metrics. and targets everyone can get behind. For example, get leaders from Sales, Marketing, and Support might co-own your revenue and growth metrics. And don't forget to assign targets everyone can get behind. Everyone at Facebook famously rallied around a mad dash to 1B users.

Long-term, tops-down direction on goals are critical. Exec engagement is an absolute must-have. Even if you want to source plans bottoms-up or push decision-making down into the organization, company leaders must be engaged in what those are. Otherwise, you'll end up with multiple points of focus, or worse, conflicting ones.

There is operational *and* existential overhead associated with the planning process. Planning comes with not only the tactical burden of updating content in the plans, but also the existential burden of making tough tradeoffs, communicating/implementing those decisions teams that are emotionally invested in their work. There is also energy and momentum lost through the process of shifting focus.

Pick the right time on the company calendar: Find a time that doesn't conflict with other big company moments like performance cycles, holidays, team/user conferences, etc. You want everyone to be able to dedicate focus.

Dependencies kill productivity. Most companies agree that dependencies on other teams create artificial blockers. Dependencies arise when teams aren't organized or architected to act independently or when it's not clear where the real dependencies lie. One thing planning can do is decouple those dependencies (through decision-making) and/or organizational structure/restructuring. Companies like Amazon have business units instead of centralized planning processes as part of an effort to actively instill cultural, organizational and architectural norms to remove blockers.

Removing dependencies doesn't have to mean removing communication and coordination. The risk of decentralized planning is that work gets duplicated or teams accidentally start competing. This can be solved through leader engagement and/or a process that looks out for this. For example, Atlassian's centralized aspects of their planning process through their strategy team after learning teams were duplicating some efforts and uncoordinated on launches.

Team plan format must mirror company plan format. Good leaders empower and enable their teams to get the work done their way. When it comes to planning, though, everything must easily and obviously ladder up into company plans. One shortcut to ensuring this is the case is getting everyone to use the same format to communicate and stay accountable to their plans.

For more on how to get there, check out The Planning Issue of The Kool-Aid Factory

Features of a great planning process, part 2

I like to imagine the company's plans as an invisible string pulling everyone at the company in the same direction. A great planning process helps the organization get there by translating ambitious goals into tangible workstreams and doing the hard work of globally-optimized prioritization up front so that it can be easily embraced in local execution of work ongoing. A great planning process also ensures that everyone, in every corner of your organization, understands, trusts, and knows how to plug into both the planning process and the ongoing execution associated with planning.

Feature list

Makes room for perspective to precede focus: Focusing on a single path forward before taking a step back will almost certainly prevent your organization from reaching a global maximum. Why? Your organization is facing an ongoing multi-armed bandit problem. And as long as your organization is growing, it will be sprouting new arms.

(Temporarily) suspends organizational inertia: The default state is to keep doing the work you are already doing. Planning can help you decide if that's what's best for your company, and if it turns out it isn't, shift the entire company at once. It also gets the whole company oriented and motivated around the same timelines; it's much more efficient to have the entire company sprinting at once.

(Temporarily) reverses organizational gravity: Employees will always be pulled towards the work closest to them; their inbox, their calendars, their stakeholders, their teammates, their managers. Planning is an opportunity to increase the gravitational pull of company-level global priorities.

Gets the time horizon right: The goal is to get to a unified and realistic plan for what the company is collectively working towards over a given time horizon. A vision will help you look out into the future and put a stake in the ground that gets you moving in the right general direction. And the plans should generate a relatively high fidelity map to get there (especially when there are crossfunctional dependencies involved). So, plan on a time horizon that allows you to do that; whether that's a two-week sprint or 3-month company-wide initiative.

Gets the altitude right: Some companies are small enough or cohesive/coordinated/focused enough to rally around a single plan–this is often the case when everyone at an organization is focused on a single product/set of features. But, once the organization comes more of a multi-lane-highway when it comes to product development (more products, teams/orgs in different phases/moving at different paces), there may need to be several sets of plans. When we were first confronting this challenge at Stripe, we solved this by having a company-level tier of plans (that took the highest priority) and a team-level plan tier (that served the company-level plans + served/accommodated their team-level goals).

Embraces tensions (and resolves them wherever possible): Planning helps the organization bring tensions and tradeoffs to the surface, and then resolve them up-front. This is particularly company leaders who will need to make decisions and drive the process. You can build trust and promote company cohesion by bringing those tensions to the surface, speaking about them directly, and resolving them when you can.

Treats the organization as a single entity (Conway's Law): coined in 1967 by computer programmer Melvin Conway, Conway's law states "Any organization that designs a system will produce a design whose structure is a copy of the organization's communication structure." Steven Sinofsky, of Microsoft and then a16z, evolved this idea with the phrase "don't ship the org chart."

Still not clear? You "ship the org chart" when your users can tell how your organization is structured based on their interaction with the product. Imagine the scenario that company A has just launched shiny new product Z and decides to include a "quick start guide." At company Z, the product manager has a goal of maximizing new signups, the marketer has a goal of cross-promoting product Y, and the finance team has a goal of up-selling the user on product Z+. If company A "ships the org chart" their quick-start guide includes three different sets of instructions to "do this first" that map directly to the goals of the teams involved. If company A doesn't "ship the org chart," all three teams come together to decide what is globally most important for the company and the quick start guide suggests a single way to get started.

Decouples cross-org work: dependencies, particularly cross-team/org ones, kill speed. No matter how good your team is at working together and how satisfying people find it to collaborate, it will ultimately be way more satisfying to close work out. This is good for your users (more stuff to take advantage of sooner) and it's good for your team (glory of shipping + reduction of cognitive load of unfinished work).

Assigns an owner for the meta-process: Once your planning process reaches sufficient operational complexity, designate an owner for the planning process and facilitate the company-wide communication on it. You want planning to feel as efficient and smooth as possible.

Understands that planning is where the work begins: Many companies have elaborate processes around getting a plan in place, and then never check in on them. Make setting up accountability mechanisms that check in on the status of your plans part of your planning process. Company leaders can decide which plans they want to review and which they want to push to their organization and team leaders to review in service of those plans. This is also where you'll define your process for making and communicating (inevitable) changes to the plan.

Staffs "platform" and "keep-the-lights-on" teams, too. The planning process will typically orient towards net-new stuff. However, there is always going to be incredibly important work being done to maintain or improve existing products and infrastructure and to support the teams that do these things (ex-teams like recruiting, people ops, and workplace, or functions like security, finance, accounting, and operations).

Bringing the team along

As in, helping everyone at the company (not just those on the Planning Committee) embrace your plans for the future.

Makes company-wide comms a first-class feature: Planning is as much about painting a clear and exciting picture of the future as it is about defining what you need to do to get there. While not everyone will directly contribute to the planning process, you can and should bring everyone at the company along with excellent company-wide and team-wide comms. Share out in All Hands. Send company-emails and messages. Be transparent about the process and decisions. Invite questions and feedback. Have your managers reiterate key messages in their local meetings.

Creates artifacts: You can intentionally design a planning process that produces artifacts of what your company leaders, teams, and employees believe the future should hold. Standardizing these will make them easier to digest and compare across. This can be a powerful source of insight, context, education, visibility, and connection across your team.

Generates memes: Clever taglines, stories, and quippy phrases will help make themes stick. Planning is a good time to wield them. One classic example is Intel's company-wide Tick/Tock cycles. Tick cycles were focused on infrastructure and Tock cycles were focused on innovation. The entire company participated. In another example, when the Sun Microsystems team moved to business units, they called them planets because planets revolve around a sun. (If you want to make someone from Stripe laugh, ask them about URP's–short for user release plan. This was the admittedly-ridiculous name I coined for the artifacts of our planning planning process. It made everyone laugh to say 'urp', but it was memorable and it stuck!)

Clarifies what decisions are centralized, and what are local: Be clear and direct about what decisions and reviews you want to centralize and what you want to want to remain local. This is a matter of what's best for the company and what's best for empowering your local leaders.

Initiates a waterfall of ownership. Most companies have fairly clear ownership models over what goals or metrics teams or individuals are responsible for. For example, PMs or GMs are often responsible for gathering sales and user ops feedback. That's all well and good but it's usually in a way that's completely unrelated to the planning process. Ensuring plans waterfall from the company level to the org/team level to the individual level, not only introduced more clarity and ownership, but also helps everyone feel more connected to each other and the global cause.

Planning = resourcing. Part of planning what to work on is deciding how you'll dedicate resources to various efforts–resources can be heads and/or budget. The planning should include ways to actually get those heads and funds to teams as soon as possible. This typically means also staffing platform and infrastructure teams like recruiting, people, and finance teams to support this work.

Prioritization = org status. Whether it's intentional or not, when you prioritize work, you effectively promote the people who work on it. You might have to smooth that dynamic with other recognition and accountability mechanisms.

Make the planning process friends with the performance process: Now that you know who owns what, and how important that work is to the broader company, you can more effectively determine (and reward) the people who get their work done… and more!

For more on how to get there, check out The Planning Issue of The Kool-Aid Factory

How do I address tough times in the world outside work with my team?

Like most big questions, there is no right answer. The answer is ultimately up to you, but I can offer some guidance on thinking through how you want to answer this for you and your team.

A few reminders before we dive in

The most important thing you must prioritize is making people feel safe at work.

A non-answer is an answer. And it's a loud on. By not talking about this stuff at work, you are sending a signal "we are not talking about this stuff at work."

You are probably not going to heal anyone or change their minds from your particular position as company leader.

You are just one person. Not everyone will be reacting in the same way as you are to what's going on. You can't begin to know how other people are really feeling. But you can make sure they

Put these hats on and see which path forward most satisfies them

Moral leader of the company hat: How will you show your team what you care about in the broader world, and your company's role in it?

Company glue hat: how will you bring people together through this?

Publicly-facing figurehead hat: How do you want to show up for your community of users and followers?

Controller of budget and resources hat: is there anything you would allocate your company's time or money to as a way to contribute?

Business leader hat: How can you keep the company on track through these times?

Human with your own human reactions hat: Do you want to let your team know how you feel? (Steve Kerr's reaction to the latest school shooting comes to mind).

Tactic Spotlight: Make a Bet

What is it? A fun way to get everyone on the team behind the same goal.

When to invoke it? For a truly spectacular milestone (maybe even one you think might never happen) or when something feels a little laborious and unfun to accomplish (like getting through user ticket queue).

Company Stories

Behance founder (and vegan), Scott Belsky made a bet with his team that if they got 100k members, he would eat meat a bite of meat off their forks

Canva CTO said he wouldn't cut his hair until they launched real-time collaboration. He went 8-years without a haircut.

Peter Thiel said he would die his hair blue when they became profitable. (He never got around to it, though)

What shouldn't we be transparent about?

The reason organizations pride themselves in transparency is that it creates a system of trust for team members to operate in. There are are scenarios in which sharing information may work against that goal.

With the understanding that transparency is not binary (and you can increases the changes that sharing contributes rather than detracts from trust by sharing at the right time in the right context), here are some topics to be particularly thoughtful about.

Caveat: I'm not a lawyer, people, or communications professional. If you're not sure about anything along these lines, consult one.

Anything that will seriously damage the company if leaked. by seriously damage, I mean it has potential to end the company (like a security breach) or interfere with a critical process (like fundraising). I do not a bad story might crop up in the press. Playing out worst case scenarios will help you make this judgement call.

HR investigations (during the investigation). There are also legal implications here. After the investigations, sharing learnings and more about the process getting there can be an opportunity to build trust with employees.

Private employee matters. Always try to protect the privacy of an employee regardless of what has happened. It might seem easier to be very open about what happened, but protecting an employees privacy (even after they leave) is the right thing to do.

Governance and controls. understanding of the details and process around this should sit with only a very small handful of leaders.

Details of company financials without context. I'm a big advocate for sharing information that helps your team better understand the health and/or core processes of the company, but many companies make the mistake of sharing this information without context in a way that distracts and confuses team members. If you're going to share detailed reports or numbers, make sure it's done with the appropriate context so that a passive consumer can metabolize the information properly.

Tactic Spotlight: Internal News Briefing

What is it: An artifact for building organization-wide context around company-impacting news.

When to invoke it? When somethings is going to hit the news that you want your team to know/hear about from you first. It sucks to find out news about your company on Twitter. It also subtly helps your team align on language to use when they are inevitably asked about it outside the walls of your company.

Examples might be fundraising, new partnership, new market, acquisition, hiring a new leaders, etc. You can also use this for less savory news.

What should be included?

One-liner. One sentence description of news/announcement

Audience. Who is most likely to be consuming this.

Goals. Why is this thing happening? Include under-the-hood story.

DRI. Who within the company people can talk to if they have questions.

Announcement timeline. You'll probably want to share this with some advance notice. Helping your employees understand the overall timeline will help everyone play along.

Ideas for sharing. What/how/where you hope employees will share the news with their networks.

Template: here

Where can we put information we want everyone on the same page about?

Something tells me you're asking this question because you're finding that there's critical information your team members aren't on the same page about. There are two reasons this might be happening. One is that there isn't alignment on the content itself and the other is that the content isn't making its way into all the corners of the organization where you team members can effectively internalize it.

It's worth diagnosing where the gap is but in either case, it's helpful to start with a single source of truth for company information. This way, employees can rely on this and refer back to it when they need it.

Establishing a single source of truth

You'll need a searchable, referenceable, artifact. A single announcement in All Hands isn't going to cut it–not even a simple message can survive a game of telephone. Here are some examples of template for basic facts about your company.

company fact sheet

company messaging

Note: It's common for stakeholders to think there is more alignment than there actually is–creating an artifact is a fantastic way to draw out competing perspectives and, from there, establish a single, consistent narrative.

Getting the word out

Once you have your artifact, turn your attention to getting that artifact distributed to all the right places. And, don't just quietly put it there once. Remind people these artifacts exist over and over and over again. Repetition doesn't spoil the prayer.

Onboarding: make sure it's part of the new hire reading list for anyone that joins, maybe even do a full session on it. Your new hires are a great place to start ushering in cultural changes.

All Hands: announce/remind team members that the documents exist

Company Wiki: give it prime real estate for people poking around

All company Slack channel: post it, pin it, cross-post it to other channels, @here about it, re-ping about it.

Make sure managers are aware of it: this way, they can make sure their teams rely on it. Have them post reminders in their team channels.

When you hear incorrect information, correct it (and send them to the artifact): it may feel a little awkward, but the maximally helpful way to shift culture and conversation. It will also model this behavior and therefore empower others to do it themselves when you're not there.

Tactic Spotlight: Hiring Plan

What is it? Artifact of plan for filling and open role.

When to invoke it? Set context for the broader team when sourcing, referring, and interviewing candidates.

What to include?

One-liner about the role

Hiring Manager (also DRI for anything on this doc)

Who might be a good fit (example LinkedIn profiles are better than generic skills)

Process for applying

Processing for referring

Sourcing constraints

Evaluation criteria

Ladder/Level

Interview Plan (who is evaluating what)

Template here

Tactic Spotlight: New Hire Welcome Doc

What is it? Artifact of plan for getting a new hire welcomes, prepared to become a good citizen of your organization, and get to productivity as quickly as possible. This should complement any company-level onboarding content.

When to invoke it? When someone new is starting. Send this out to anyone that might interact with person to set context on what they're here to do.

What to include?

Role (few sentences)

Why you're here (How this role fits into the broader mission/goals of the company. Turn up the pathos, logos, and ethos)

Team (Who this person will be working with an in what capacity)

How we work (notable collaboration norms and/or operating principles)

Stakeholders (name, relationship)

P0's/glass balls (things that can't be dropped)

P1's/rubber balls (things that are important, but bounce back if dropped)

What a great job looks like

What a not so great job looks like

Anticipated joys

Anticipated challenges

What you'll teach us

What you'll learn from us

30, 60, 90 day plan (starting with what should be accomplished at each milestone)

Operating rhythm (things to join in on, ways to engage with companies)

Reading list

1:1 list

Lurk/Shadow List

HR/Tech Setup list

Template here

Advancing the collective wisdom of your organization

Establishing a system of shared knowledge not only makes an organization more effective, it also helps turn a company into an incredible source of community and self-actualization for its people.

Here's how to get there.

Think about documentation in terms of papertrails and curations: Papertrails are documented accounts of what happened, typically produced in the run of work while it's happening. Slack pings, client emails, bug reports, Linear tasks, meeting notes, agendas, and brainstorm docs are the some examples. Curations are artifacts of work produced to contribute to the system of shared knowledge. These are typically editorialized summaries of work that has already happened or an outlook on work that will happen soon. Think: retrospectives, PRD's, kickoff docs, etc. You can read more about how I think about papertrails and curations here.

Establish a culture of curations: Your organization will naturally produce many, many more papertrails than curations, but curations are a forcing function for global thinking and communication. It activates a very different mindset to spin up a doc to jam on an idea with someone quickly versus writing something that others around the organization with less context on the work will read. This critical shift in going from thinking about how work gets done in your immediate working group vs how work advances the collective wisdom of the organization forces everyone to provide more context on their work and connect the work to the broader goals of this company. This makes the content a lot more legible (and useful) to randos in the corners of your organization.

Create distribution channels for curations: This is a critical part of the flow of information process that most teams will ignore. But, where a document goes once it's created is the source of all of your docs sprawl so you want to make sure it goes to the right place. Some examples of good norms around communication/distribution channels are having Slack channel naming conventions so that people can easily self-serve on poking around or creating a shipped@ channel or a state-of@ channel where people can curate/spotlight for the company). This structure can apply to other communication tools like your bug ticketing system.

Think about distribution in terms of push/pull: A team members can "pull" information from the system by going to search for something (in Slack or your Wiki or by asking a friend). Information is "pushed" the team members when they don't know they need to look. For example, it's great if Chan wrote the product FAQ and published it to the team Notion page, but if Alyssa doesn't know it exists, she'll never know to search in Notion in the first place so she'll never see it. Distribution channels for curations help you push more information out for people to scan/scroll in.

Creating more channels, but highly targeted channels, is okay: When it comes to the docs sprawl, it can feel counter-intuitive to spin up more channels. But, the things that make things feel sprawly to consumers is that you can't find what you're looking for. It's so easy to miss critical information in channels like #engineering or #general because they are a catch-all for all kinds of information: fun stuff, requests for action, things to read up on, etc. Whether you know about something depends on when you click into the channel and how far up you feel like scrolling. With more highly-targeted channels, even if there are more by count, information will be easier to navigate to. (And, those channels will naturally become lower-volume). Here's a list of my favorite company-wide communication hubs to start with.

People will self-select into what they read which will lead to distributed collisions: Moving information through managers is extremely inefficient and, I work argue, largely ineffective. Not even a simple message can survive a game of org telephone. And plus, managers can't carry all the rich context and texture about interests and inclinations that employees know about themselves. By allowing employees to self-serve on what they consume, information can move freely throughout the org.

Remember, gaming the system is good. Org "points" for good stewardship: If you want your company to value this, you have to make sure good behavior is not only accepted, but rewarded in the culture. Managers and leaders around the company can and should be spotlighting and recognizing this work.

Appoint rangers for communication channels (especially company wide ones): Rangers are responsible for upholding the norms of a given channel. In other words, they are explicitly given the organization's blessing to keep the communication in a given channel relevant and productive. So, they may say things like "don't forget to include $x-information when you ping in this channel," or "can you please move this to channel y that's a better fit for this kind of conversation." They may also be responsible for building out guidelines and templates for appropriate communication. When deciding who should be a ranger, choose people who are already great communicators and naturally value this work, should be thought of as a lite honor (and communicated as such in prep) they are responsible for help setting, upholding, and evolving the norms in the channel (writers and readers), and can act as a go-to for those with questions, should not be a meaningful amount of time. For example, if someone uses the wrong channel for something, the ranger should feel totally empowered and culturally-accepted to respond with the slightly-annoying-in-the-moment-but-good-for-the-health-of-the-overall-system "could you please share this in x channel instead so that $insert-specific-reason-here."

Don't hire someone to be the sole owner of this work: I think this instinct comes from the right place ("we're investing in this thing by hiring up against it" is usually the right call), but this should be everyone's job and everyone's going to have to link arms to make this happen. Rangers help with this. So can managers–you'll want to make sure managers are bought-in and encourage/value use of these.

Write a company communication guide: This is a helpful forcing function for getting crisp and prescriptive on your expectations and norms for where and how to communicate at your company. For each communication channel/tool combination, include details about ownership, roles and permissions (read, write), SLA's, norms, etc. It should be introduced during new employee onboarding and then available to reference at any time. It can also include your expectations for tone and/or words and phrases you like and don't like. Here's an example of one I wrote for Slack norms.

Your Company Digest, not your All Hands, is your best global push mechanism: Your company digest is a curated list of everything anyone in any corner of the organization should be aware of. It is pushed out to your team at some set cadence for reading. This is better than All Hands because it's async and people can read it when they are in the mood.

What does a fully-functioning go-to-market org look like?

Go-to market organizations typically have the following four sub-teams. Here's some things to keep in mind for each.

Sales

Support

Marketing

Comms/PR

1. Sales

This team will often have SDR's (sales development reps) who pound the pavement with outbound, sales reps, and account managers (for once the sale is made)

Over time: you may want to vertical-ize (retail, sass) and/or have people focus on tiers (enterprise, SMB's), you can also have product specialists as a full time role or as a part of someone's role

Sometimes this org also houses: business development, partnerships

2. Support

This team will have people actively doing ticket and those doing the scaled work that supports them (tooling, management, documentation, etc.)

Over time: you may want to have product specialists and/or dedicated agents for top users (this can be a career path opportunity into sales or account management)

Sometimes this org also houses: education/documentation, field/integration teams

3. Marketing

This team has a lot of potential directions. The main differentiator for the marketing org is that they think company:many where sales and support teams are mostly 1:1. Here's an overview of the potential sub-teams:

Brand: look and feel of the company (works closely with design and comms), maybe writing (editorial and copy)

Product: launches and campaigns for new products and features, messaging across the portfolio, think in end-to-end flows for users throughout their life

Community: social, programs, events

Growth: website, acquisition (ads), lifecycle (email, nurture campaigns, etc.)

4. Comms/PR

In my experience, companies are either comms-led or marketing-led, and that should be made explicit. Otherwise, it's really confusing (and tense!) around messaging.

This team will typically have some combination of brand comms, product comms, and internal comms. Some comms teams are naturally more reactive or proactive.

Comms teams typically need a process or person for crisis comms (when PR shit hits the fam) and executive comms (to make sure company execs represent themselves and the company well) too.

Here's a rough sketch of the org chart with an emphasis on marketing (since it's often the sprawliest of the gtm orgs)

A love letter to retrospectives (+tips)

To quote my favorite book on retrospectives (yes, I have a favorite book on retrospectives), a retrospective is "a special meeting where the team gathers after completing an increment of work to inspect and adapt their methods and teamwork." Retrospectives can apply to all sizes and shapes of work, for all teams and they should be conducted for ~every workstream.

Retrospectives are so effective because they help the whole team learn together, and then use those learnings to create change. They focus not only on the work itself, but also, critically, on team dynamics. They help emphasize and implement methods of work and qualities of teams you want to continue, and come up with a plan for those that you want to change. Retrospectives are *not* a punishment for work that went sideways. They are just as valuable for work that has gone exceedingly well. They are all about what you want to take with you into the future.

As a bonus, when done well, the very act of participating in a retrospective can also bond teams and build trust through dispassionately aligning on an account of events, facilitating open-minded discussion, and a collaborating on a vision for the future.

Here are best practices for conducting retrospectives

First, a note on language

The term “retrospective” is often interchanged with “post-mortem.” I advise you insist upon using the term “retrospective.” The primary definition of post-mortem is “an examination of a dead body to determine the cause of death.” The term is morbid and connotes death which does not align with the goal of the retrospective which is to promote health in the work.

When to retrospective

There should be some space between the completion of the work and the retrospective. The magnitude of that space will be determined by the length and complexity of the project as well as the level of controversy. The longer, more complex, and more contentious, the longer you should take. However, it shouldn’t be so much space that team members start forgetting details. The max you want to wait is about a month.

You can do a retro on your own, or get a group together for a discussion.

Who to invite

Everyone at the retrospective is expected to participate in discussion, help make decisions, and be a part of the next steps. As such, attendees should include those closely related to the work. Participants should not be restricted by team or function.

For more substantiative retrospectives, it may be helpful to have someone in the room that is not close to the work. This person can focus on the process and structure of the retrospective and remain neutral in the discussion.

The better the discussion, the more effective the retrospective. The two highest contributing factors to the quality of discussion are 1/ how prepared attendees are and 2/ how well the retrospective activity goes. Both require planning.

Preparing (yourself and others) for the retrospective

There are many different flavors of retros (I like 'Stop, Start, Continue', template here) and often they require materials (ex- sticky notes, poster paper, colored pens or your favorite collaboration tool du jour–Figma, Miro, etc.). Make sure you'll have these on time for the retrospective. (I'd also recommend making a list of topics, themes, or events that you hope come up. This way, if they don't, you can seed conversation.) Once you know your activity, send a heads up to the team with some details of the activity so that they can prepare their thoughts.

Your prep note might include the following details:

A reminder of what a retrospective is and why it's a good practice to do it

A proposed goal for the retrospective

Most likely, it should be something related to developing learnings that can be leveraged in the future (either by your particular team, or your organization more broadly)

When you will be meeting

Who else will be attending

A proposed scope for discussion

A description of the activity

And a request that attendees prepare thoughts in advance to be shared during the activity

An invitation for questions or input in advance of getting together

The recap

The retrospective artifact is critical for maximizing the impact of a retrospective because this is the thing you're going to send around for anyone to learn from. Tell the story. Make it compelling. (And, easily scannable).

Your recap note might include the following details.

Key learnings

What you'd do differently next time

Decisions

Next immediate steps (with owners)

Ideas other's doing similar work might want to keep in mind

Your personal editorial

If you're looking for more

Or think retrospectives could be your bag, I highly recommend reading Agile retrospectives: making good teams great. It goes really deep on not only the practices, but also the principles behind them. It also suggests ~a dozen excellent activities. If you do read this book, you'll see that I borrowed many of the ideas for this chapter.

Tactic Spotlight: Office Hours

What is it? A way for teams to make themselves available to their crossfunctional partners to discuss work and answer questions

When to invoke it? When teams/leaders are feeling inundated with one-off 1:1 requests. If you establish a set cadence for these, ad-hoc requests can be pushed to this forum to save time and help teams remain focused.

FYI

This is a mechanism borrowed from academia, wherein professors make themselves available at designated times for 1:1 time with students outside of class.

Teams or workstreams can have these. At Figma, the legal team set up weekly office hours for anyone to come to with one-off requests or contract reviews. At Stripe, the writing team had office hours to help people with anything from product copy to blog posts to internal emails.

Ownership for facilitating can rotate. In the examples ^, the same lawyer or writer doesn't have to attend every time.

Tactic Spotlight: Mission Statement

What is it? What everyone is working together to achieve, the one-liner

When to invoke it? establishing consistent language for describing what the company is working towards. If you raised money, you probably included one in your investor pitch. That might not be the one your early team wants to get behind, or the one your later team embraces once you establish your footing as a company. Stripe's mission statement, "increase the GDP of the internet," was something a journalist reflected back to the founders in an interview. It stuck.

Tips

It's subtle, but using aspirational versus descriptive language can make a real difference in elevating the day-to-day work of your company.

Uber and Lyft don't say "we help people give and get rides places." Instead, the focus on the benefits to people and society. Lyft's mission statement is: "Improving people's lives with the world's best transportation." Uber's mission statement says: "We ignite opportunity by setting the world in motion." Stripe doesn't say "we make payments better." Instead they focus on their purpose around economic access and growth. Their mission statement is "increase the GDP of the internet."

Since a mission statement is mostly about what other people say, and aligning it on a singular phrase, make it something you and your team would be proud to say over dinner or in a meeting.

There's a fine line between ambition and hubris. Bias towards ambition by taking a clear-eyed look at what's possible if your company was wildly successful. Steer clear of hubris by taking a clear-eyed look about the reach and impact your company can actually have.

Some favorite mission statements

Hallmark: create a more emotionally connected world

Nike: bring inspiration and innovation to every athlete* in the world. *If you have a body, you are an athlete

Microsoft (in 1980): a computer on every desk in every home

Google: "To organize the world's information to make it universally accessible and useful."

SpaceX wants to make humanity multiplanetary. From their website: "You want to wake up in the morning and think the future is going to be great – and that's what being a spacefaring civilization is all about. It's about believing in the future and thinking that the future will be better than the past. And I can't think of anything more exciting than going out there and being among the stars." – Elon Musk

Patagonia is “in business to save our home planet” From their website: “Patagonia grew out of a small company that made tools for climbers. Alpinism remains at the heart of a worldwide business that still makes clothes for climbing—as well as for skiing, snowboarding, surfing, fly fishing, mountain biking and trail running…. As the climate crisis deepens, we see a potential, even probable end to such moments, and so we’re fighting to save them. We donate our time, services and at least 1% of our sales to help hundreds of grassroots organizations all over the world so that they can protect what’s irreplaceable.”

My favorite, lesser-known, reads on company culture

You can also find this list on Startupy

Faves and founder-focused

I would say these are the ones I share around the most, they're not necessarily canonical, but I think they're the right amount of counterintuitive to get the gears turning! (Sharing in order of most to least shared/referenced, but I really do share/reference these all a lot).

An interview with Patrick Collison in Elad Gil's High Growth Handbook

How Organizations Are Like Slime Molds, Alex Komoroske

Demanding and Supportive, Ravi Gupta

Be Kind, Boz

Antifragile, Boz

Inspection and the limits of trust, Will Larson

https://marginalrevolution.com/marginalrevolution/2018/10/high-return-activity-raising-others-aspirations.html, Tyler Cowen

Five Levels of Autonomy, Matt Mullenweg

Conway's Law

Little things make all the difference, Derek Sivers

An interview with Patrick Collison at Khosla Ventures Summit

We Don't Sell Saddles Here, Stewart Butterfield

From YC's How To Start A Startup

How To Operate, Keith Rabois

Hiring and Culture,(Patrick/John Collison, Ben Silberman,

What made working at Stripe so special, me

Ten things we know to be true, Google

Don't Fuck Up The Culture, Brian Chesky

Why Writing Cultures Win, me

Writing in Public Inside Your Company, me

Tinkerings of Robert Noyce, Tom Wolfe

From Ben Horowitz

Peacetime CEO, Wartime CEO

Which Way Do You Run?,

How to ruin your company with one bad process

From Paul Graham

What startups are really like

What we look for in founders

Culture becomes experience, Julie Larson Green

World Building, Alex Danco

Four Common Gaps in crossfunctional teams, Michael Siliski

Good Questions, Julia Evans

Faves and operator-focused

Moving Faster, Jamie Brandon

An incomplete list of skills senior engineers need, beyond coding, Camille Fournier

My Heroku Values, Adam Wiggins

How to Be Great? Just Be Good, Repeatably, Steph Smith

Hackers and Painters, Paul Graham

Help! I have a manager, Julia Evans

Faves and a little sardonic but still really good

The Gervais Principle, Or The Office According to "The Office", Venkatesh Rao

Uncanny Valley, Anna Weiner

8 reasons (within your control) you're not being promoted into leadership, Samantha Davies

What I miss about working at Stripe

Excerpt here. Read the full post on Every!

....

There's no way around it: the culture was demanding. I spent many late nights working. I cried more than a few times after feeling like I let a user or a colleague down. My heart would beat out of my chest before heading into an exec review. There were many times that I had to grab a colleague for a calm-down lap around the office after we decided to yet again delay the launch I was sprinting towards to get that final pixel perfect. My imposter syndrome was through the roof. Once, my manager asked me to reconsider the vacation I had been planning because my team needed me. "If you go, who will cover your work?" I looked around at my colleagues who were also regularly working 15-hour days and decided to stay put. I'm proud of that choice. Call me masochistic, but I have to admit that it felt good to care about anything that much. And, to be around people who I know cared that much too.

Once a candidate asked me what my favorite period in Stripe's history was. I thought for a second. "This may be weird, but it was in 2015 when our API was facing major stability issues." She raised an eyebrow. I started squirming. "You look surprised," I continued, trying to regain some composure–I was selling her as much as she was selling me. "It's just that we learned so much about how badly our users needed us and everyone really stuck by each other and made themselves available to help in some really spectacular ways." I prepared to tell a story about how the sales team ordered a bunch of pizzas to the office for the account management and support team, when they realized we were going to be in for another late night. But she jumped back in. "I guess I am surprised. But it's mostly because you're the third person to mention that same thing to me today."

Lately, I can't help but feel like Silicon Valley has lost this culture. I don't hear people talking about work this way anymore. Maybe that's for the best. Maybe it isn't.

keep reading here

How can we recognize great work across the company?

Recognition is really important to get right. On the individual level, it's a fantastic source of motivation. On the collective level, it's the best way to establish the standard for quality.

I like to think about recognition on a 2x2 with formality (formal vs informal) on one axis and direction (tops-down vs side-to-side) on the other. Here are some examples of norms and mechanisms that you can bring to your company in each quadrant.

Most companies overlook three critical aspects of recognition:

establishing a foundational understanding of what "great" looks like at their company: This must come from the company leaders. And, the more specific, and the more thoroughly-documented, the better. That way, there is always something you can point to and say "push it in this direction," or "this is where that thing didn't quite meet the bar."

the informal stuff: which, in my experience, these are some of the highest ROI activities.

monitoring the side-to-side informal: this is the place that's most susceptible to team members reinforcing the wrong behavior and work product. It might not sound like a big deal when someone gets a pat on the back for meh work, but if your organization does too much of it, the quality bar will fall over time.

Tops-down/formal

Promotions and raises (this is where ladders/levels can help you codify expectations)

Spot bonus from a leader (use these sparingly and make a splash when you do)

Taking on a new role (even if it's "sideways" on the ladder, it can be framed as personal and career development).

Assigned as DRI to larger and more critical projects

Asked to represent the company (events, interviews, talks, etc.)

Selected for a role as formal mentor or guru. These can be person-to-person-based (ie-supporting a junior team member) or topic-based (ie-being asked to "red pen" on writing, selected for the "launch review committee")

Selected as a leader shadow (Amazon's Jeff Bezos had a rotating cast of shadows in his time as CEO, including now-CEO Andy Jassy)

Participating in 'bar raisers' interview process

Allocating extra budget to do something

Side-to-side/formal

Survey with a single question "who among your peers best embraces our company values"

360 review designation

Peer spot bonus (have very clear guidelines around this if you are going to implement a program like this)

Asked to post to the company blog about what you're working on

Presenting about work at company all hands or featuring work in the company digest

Tops-down/informal

Spotlighting great work for the rest of the company (ie-cross-posting work in the corner of an organization to a company-wide channel)

Asked for feedback on a particular thing (ex-comms to company, product spec, etc.)

Invitation for casual time with leader (meal, walk, coffee)

Sending a personal thank you (this is surprisingly effective, especially if it is very earnest and specific)

Gifting something personal (at holiday time or at important milestones)

Side-to-side/informal

Hi-fives or kudos tool/channel

Shoutouts and thank you's

Presenting work to another organization

How do I encourage spicy feedback about how things are going at our company?

One of the essays I return to most is Ben Horowitz's Peacetime CEO/Wartime CEO. In it he states, "wartime CEO is paranoid." I think all great leaders are at least a little paranoid, and when that tingly feeling starts cropping up, I think a desire to chase it down is a the right instinct. Especially because, whether you like to admit it or not, you're probably surrounded by a bunch of sycophants who want a promotion from a raise and know the best way to get there is to tell you how awesome things are going. You can't just wait for the tough stuff to fall in your lap. You have to go hunting. Here are some ideas for how.

Listening tour. Take a tour around your company and ask about how things are actually going. Do this in groups of 3-7. Depending on the size/shape of your company, you may want to be selective about who comes and what the composition of the group is. I'd advocate for having crossfunctional vs team-oriented groups so that you stick to the the company-level, not team-level, topics. Be explicit about wanting to hear about the papercuts. Come with particular topics you want to tackle (it'll show not only that you have the finger on the pulse, but also help extract the stuff you really want to know).

Braintrusts. If you have some hypothesis about what challenges your organization is facing, and who may be feeling the pain most acutely as a result, get those people into a room to talk about that topic directly. Prepare qusetions that'll help you deepdive. You're

FUD. In the early days at Stripe, we had a forum called FUD (short for fear, uncertainty and doubt). At the end of the typical Q&A session, we moved into the FUD section, where people raised questions about stuff they had fear, uncertainty, or doubt about. This set a clear tone for the company that we were not only allowed, but encouraged, to talk about the hard stuff. Because everyone is generally well-mannered in these public forums in high-trust teams like Stripe's early team, it also helped us build good habits around these conversations–what language to use, how to be gentle with one another, how to keep things peaceful.

Minority Report. Stripe instituted this mechanism that never quite caught on, but I thought was a really, really cool idea. Here's how it worked. Anyone could write up a memo that makes the case for something the company wasn't doing but should. And I mean anyone. The idea was that this would help anyone in any corner of an org raise a flag and/or surface good ideas. Contract was that if someone submitted one, an exec would read and respond–there was no promise of action, but there was a promise of serious consideration.

Other examples of mechanisms like this are: Google's Bureaucracy Busters (to help IC's surface and breakthrough any org red tape) or Toyota's Andon Cord (so that anyone can stop the assembly line, also implemented by Amazon and Netflix)

What not to do

Dear god not a survey. Faceless processes get faceless inputs and faceless results. Take your human self into the room (IRL or Zoom) and ask human questions.

Not a lipservice mechanism. It'll be extremely obvious and very annoying to your teammates. Don't waste their time if you aren't prepared to listen and act.

"Over to you, folks." Come ready to be an active participant in the conversation. Have hypothesis and questions prepared to keep the conversation alive.

Don't outsource. If this is truly about making the organization you are in the driver's seat of better, don't send someone else to do the information collection. be there to listen and ask questions. The details and nuance matters. A lot would be lost in the write-up. Also, it'll get you some precious time with your colleagues. You may even make a new work friend or two in the process.

Force solutions talk too soon. Listen, really listen, to the problems. You want to get very, very crisp on what the contours and surface area of the problem is. Jumping to solutions too soon, or asking folks without full oversight on the company to generate them, will likely lead to suboptimal solutions. Idea generation is fine, but it shouldn't be the goal.

Skip the followup. You don't have to act on everything you learn about, but it is important that you reflect back what you heard to the people who bravely shared.

Read this before you deliver that feedback

The feedback conversation is a delicate one. Here are some things to keep in mind for your conversation:

You are on the same side: the intention behind delivering feedback should always be that you want them to be successful. Consider making that explicit at the outset of your conversation.

Consider and convey your degree of conviction: Where on the spectrum of "you might want to consider this" to "you should take actions against this" are you? Make that known.

Go directly to the person : Going straight to the person closest to the work is always a best practice, but it's particularly important when it comes to feedback. Even a simple message won't survive a game of telephone and the risk of having your words misconstrued in the context of tough feedback is high. The more direct and transparent the communication in your organization is, the less political it is, and everyone at the company should take ownership of their role in that in every interaction.

If this seems scary, or not feasible for some reason, ask for support from colleagues and managers it making it less scary or more feasible.

Relatedly, if someone is talking about someone else, ask them if they've communicated this directly to the person (especially if they expect or insinuate that you do something about it).

Focus on normative observations: Don't make assumptions about why or how. Don't make judgements. Don't state opinions. Share examples and show evidence. This will make it much more likely that you can start from a shared understanding of reality.

Be inquisitive: the feedback conversation should be a conversation meaning you should be prepared to do at least as much listening as talking. Ask questions about the other person's context, perspective, and experience and really listen. This will help you create a foundation of understanding and trust that will not only make your conversation better, but also help you work together more effectively in the future.

Be forward-looking: the feedback conversation will typically start out by taking a look at something that has already happened, but it should ultimately be oriented on how to make things better going forward. Come to the conversation with ideas on what that better future could look like and co-create the path forward.

Speak from your own experience and perspective: Unless you are delivering a formal review with the explicit purpose of consolidating/summarizing feedback from others, do not speak on behalf of anyone that isn't you. It's good for individual relationships and good for the overall health of the organization.

Lean on stated principles, values, expectations, and standards: Anchoring feedback on what was already agreed upon by the organization and team, and where the target work/attitude is a departure from that, will help the conversation stay focused and productive.

Make absolutely sure your feedback was received: As the person delivering the feedback, it is your responsibility to ensure that it has been understood and internalized. If it hasn't, it is also your responsibility to go further.

When you're ready to find the words or the right context to deliver it, give this decision-tree a look.

How should we handle underperformers?

This should go without saying, but it is often overlooked that evaluating performance starts with having clearly defined and clearly articulated standards for work. And, I don't mean having ladders and levels or a performance review process in place. I mean having a crisp sense of what work product clears the bar and what doesn't. Once that's in place (and, it's much easier said than done), you can start looking at whose work is consistently not meeting that bar.

Spotting underperformers

Clarifying goals. Spend time upfront with team members to create clear goals (this can be in the form of clear deadlines, metrics, or defining shippable units of work) so you can easily spot when an employee is not hitting them.

Tracking system. Check in on these goals proactively in your 1:1's. Don't wait for them to give you updates. Ask how things are going.

Peer feedback. Peers working closely with team members probably have the best insight on the quality of work. You don't have to wait until performance reviews roll around to get to these. A simple ping with the question of "how are things going working with x" is available to you any time.

Underperformers usually know they are underperforming.

Getting it out in the open. Help them talk about it openly not by pointing out everything that's going wrong, but rather by asking them what conditions could be set to help them be more successful. Help them say it first so they don't feel "found out."

Exercising empathy. Underperformance is frustrating for everyone! But, it's usually the most frustrating for the person who is underperforming day in and day out. Be kind.

Turning towards micromanagement doesn't work. When someone's underperforming, the feeling of being under a microscope often exacerbates things. There's a lot of research behind the phenomenon that the presence of others makes high performers perform better and low performers perform worse. Think about it. This is why track stars PR on race day. It's also why having someone watch you type probably slows you down or causes more mistakes.

No hidden PIPs! It would do a tremendous disservice to your team member and your company to keep a performance improvement plan a secret from them. The whole point of a PIP is to create a plan to get them back on track, and they should share in those plans.

Keep the focus on the work. Underperforming feels personal. You can help with that feeling by keeping things oriented on how the work is going and how to improve the work.

Show them you're a partner in their success. Create forums and space to work together towards achieving goals. For example, create extra 1:1 time every week to collaborate on work.

Leaders should be held to the same standard and process. Arguably an even higher standard for performance. A leader's manager should also be keeping up with their performance and success.

Formally dealing with an underperformer directly

Performance improvement plans. These should be used to help an employee stay. They should not be used as a way to usher someone out. They should be designed with fair timing and clear goals. PIP goal should be the start of improvements not that an employee is hitting every single goal. If you have no intention of keeping an employee do not make them jump through hoops of a PIP. The end goal of a PIP should be to help an employee get back on track NOT an HR checklist to prove they can now be terminated.

Termination. If employees consistently (6 months) underperform against clear goals, you should terminate employment. 6 months might seem like a long time, but it is fair. 6 months gives enough time to recognize the problem and gives the employee time to correct or at least start to correct.

Actively managing externalities

Colleagues and stakeholders know. If the rest of the team is probably avoiding working with them and talking about it amongst themselves. Some of this is gossip (bad) but some of this is strategizing about how to work around this (good). As a company leader, want to help get this under control ASAP.

Don't ignore the problem. Performance doesn't fix itself. Get hands-on! As a manager, it's quite literally your job to make this better for everyone.

Colleagues and stakeholders want to know you know. It's critical to maintaining the quality standards of your organization that you are clear that you see and deal with underperforms. But, it is not okay to discuss the sensitive details around another employee's performance. It is okay to get involved in the work to help close any gaps left by an underperformers.

NO GOSSIPING! From you, or your team members. Gossip, in all forms, is toxic in an organization. Be solutions oriented. Be direct. Go to the source with feedback. Encourage others to do the same.

Add extra steps in workstreams to check/improve work. One way to contain the problem is to fix things before others see them. Adding an extra review or collaboration step for just the two of you before the work goes out to others can help.

Other teammates stepping up to help. High performers surrounding an underperformer will often naturally step up to help. They can also be nudged to do so. When they do, explicitly recognize and reward them.

Retrospective

Once an employee has left it is important to understand what this happened and check in on trends. Take the time to learn from why this did not work out so you do not repeat the same mistake. Hiring and onboarding is extremely expensive and resource draining, don't waste these resources. here are some questions you can ask of yourself and your organization.

Is one team underperforming consistently? Is this a problem with leadership? Clarity of goals?

Was this a hiring mistake? How can you adjust the hiring process

Was the role not needed? Role not on the right team? A different set of skills for that role?

Was this an onboarding issue? Did the employee not have enough support?

Did the employee have enough time to onboard?

Did they get enough information about the company? And the team? About their projects?

Was the employee not a good team fit? Was the work not up to standard? What can you learn from this as you move forward?

Is it a trend on a certain team that people leave after x amount of months because of performance?

Has a manager/hiring manager had multiple performance issues?

Is it a specific type of work at the company that is poorly performing? How as a company can you remedy, you need all types of work! If your company is only having successful engineers, you will not have a successful company

Tactic Spotlight: Customer Obsession Moment

What is it? The moment a user decides they can't live without you.

When to invoke it? As a way to rally your company around a single moment of customer love. That way, everyone's strategy can help point to this.

This article from First Round Review describes Superhuman's strategy to orient their product around early users that reported feeling 'very disappointed' if they could no longer use superhuman, even though it only accounted for 22% of their total user-base at the time.

Tips

Many companies take the lens of the 'magic' moment, but the best want their customers to experience more than delight. They want them to experience obsession, desire, or a desperate need to have them in their user's lives.

You can let your customers tell you what their obsession moment is and you can help create it through the way your product works. Consider what you want your customer obsession moment to reinforce (Acquisition? Retention? Loyalty? Referrals?) and build from there.

There should probably be only one of these.

Customer stories

Shopify defines this as a user's first sale

Lambda School's is when a student gets hired. You see people from the company tweeting about this all the time

Facebook's early metric was "7 friends in 10 days"

Slack's: was 2,000 team messages (90% of teams that reached this milestone didn't churn)

Isabella Stewart Gardner Museum director, Anne Hawley, called the patron's first step through the modest facade and into the lush courtyard garden an "epiphanic moment"

Non-obvious functions to nail earlier than you think

Onboarding

Bizops

Internal comms

Admin BP

Internal tools

Research

Editorial

Talent brand/Brand Marketing/Comms (getting company messaging tight)

Favorite reads on writing well at work

How to write well at work

Other great resources on writing well

Putting Ideas Into Writing, Paul Graham

Writing, Briefly, Paul Graham

On Writing Product Specs, Amazon

Becoming a Better Writer as a Software Engineer

Writing strategies and visions

Product Planning, Stripe

Writing in Public, Inside Your Company

(podcast) Amazon Narratives: Memos, Working Backwards from Release, More

Telling your colleagues you did something cool

If you did something awesome, you should tell the company about it! It will not only contribute to the library of shared knowledge at your organization, but it will also help people in other corners of the organization familiarize themselves with you and your work.

Questions to ask yourself before you get started

Is this awesome enough to share? (What have others shared that you've loved? Is this on par?)

Has this made a meaningful impact on the company in some way?

Would someone else benefit from knowing about it?

If you clear the bar, create your artifact!

Questions to ask yourself before you get started

Summary: what did you do? How does it help the company?

What shipped? What exists now that didn't before? (project details, where to do look, how to use it)

Context and motivation: why the company wanted to do the work (why it was prioritized, what set the stage for the work, what should be different now)

Under the hood: the story of how it got here, for our eyes only (what could go down in the company history books about it? What didn't ship? Why? What does the company know now that it didn't know before)

Success criteria: how we know if we did a good job (what metrics did you use, what was the experimental design?)

What's next: how this impacts the future (what do you expect now that it's live? What work is left to be done? What is left to learn?

How to keep tabs: staying engaged with what's happening (where to go to follow along)

Asks: if there are any for readers or onlookersThanks: to everyone that contributed (specific names and actions!)

Quick tips:

have at least two other person read a draft before you send it–one person who is familiar with the work and one person who isn't.

give it some personality! it should be fun to read

How to spread the word about it

This part is just as important as generating the artifact.

Post the artifact to the appropriate company-wide chat channel/email list

DM it to people you think should know about the work or might be especially interested (including the people you thanked)

Update any documentation that references your work to link to your new artifact

(if it's really, really good stuff) Present about it in All Hands

How can I choose good metrics?

A crisp metric is a great way to show what your company cares about moving the needle on. Here are some ideas for picking metrics.

Gut-checks for "good metrics"

Ask “why do I care about this?” for each metric until the answer is “because it makes the company better.

If I were to tell someone my metric and only my metric, would I feel like they have a good sense of how my team is doing?

Assuming I was running an experiment (and most workstreams at these rapidly changing companies are experiments), would this metric tell me if my experiment was succeeding or failing?

What do our users care about? Does this metric move the needle on that? How?

(Especially for a north star metric) If I spend 100% of my time working towards this metric, would my time be well-spent?

If the metric was moving in the wrong direction, would I change my behavior? (Bonus: would I know what behavior should change?)

What unintended behaviors could this metric incentivize? (For , if you’re on a fraud prevention team and your metric is “blocked accounts,” might you inadvertently block good customers for the sake of your metric).

How does our set of metrics play together? Remember. “if the highest aim of a captain were to preserve his ship, he would keep it in port forever” -Thomas Aquinas

Using with the SMART framework

Specific: The metric is focused on a single objective

Measurable: You can measure this now (or have a path to it)

Achievable: The target can be achieved with the available resources (team, skills, priorities, tooling, etc.)

Results-oriented: The metric reflects an observable outcome

Targeted: There is a value that you aspire to and a timeframe for achieving it.

On targets and metric-fidelity

The expectation for reaching your target is a cultural one (on both the team and company level). At some companies, and in some contexts, you might value high-fidelity metrics and targets (ie- you hit your numbers). Sales and recruiting teams are a good example of teams that usually hit high-fidelity targets (especially if you are going to compensate employees based on them). At other companies, and in other contexts, lower fidelity metrics or targets might do the trick. A favorite metric at Stripe was startup penetration (as in, what % of startups that exist are on Stripe). Even know the data underneath the metric was a little shake (which I'm comfortable saying because I helped stand that system up!), what mattered more is that we had a reason (and a number) to come back to the value around reaching startups over and over again.

The most important thing is that you're clear about the status and expectations for each metric and target (and the consequences of hitting them or not).

Peloton has a 100% NPS target. Will they ever hit it? Probably not. Will anyone get fired over it? Probably not. Does it make a clear to everyone what the company cares about? Definitely.

Tips for helping the team embrace them

There should probably be a single "North Star Metric" with 3-5 additional supporting metrics.

Make these meme-able if you can. Targets of 0 or 100 are easy to remember. When new president Joe Biden took office in 2021 with a mission to get the still-spreading Coronavirus under control, he set a very public target of "100 million shots in first 100 days"

Put these on a visible dashboard

Send these out in an email along with some editorialization about how things are going

Celebrate together when you hit targets

Review progress in All Hands every week

Examples/flavors of metrics I like

zero targets: zero churn (or zero churn of top users), zero incidents

streaks: ending day with support queue at 0, signups above x number, code committed

To make a metric more tangible, you could consider orienting around great experiences of individual users versus averages across all users (especially early on at a company). This may mean looking at performance of top user(s) only, seeing if a single customer can beat its previous best on a metric (or get overtaken by another user), or maintaining some bar for activity over an increasingly sustained period of time.

operating leverage: revenue/headcount, user feedback conversations

count of accounts over xMRR

product adoption/acceleration

input metrics: lines of code written, number of tickets answered, products shipped

output metrics: revenue, user satisfaction, team satisfaction, product adoption

For Those Big Swings in Blood Kool-Aid Content

The best and worst thing about working at a rapidly scaling tech company is that everything is different every three to nine months. Another way to think about this is "the rule of three and ten" which the founder and CEO of Japanese tech company Rakuten developed to describe how every single thing at a company breaks at multiples of three and powers of ten. What this means for you is that whatever you love or hate about your job today may no longer be a part of it soon. These periods of highs and extreme lows will vary in duration and intensity. For better or for worse, without any proactive intervention, it always changes soon.

When I feel like making a big decision or declaration based on my current state of startup mind, I like to do a check-in with myself on my Blood Kool-Aid Content level—in other words, how drunk on my company's mission, leadership, coworkers, role, and operating norms am I at a given moment? A high BKC feels like I can do this work, with these people, every day for the rest of my life and be happy. A low BKC feels like I'd consider throwing my laptop out the window at any moment.

Whether you're way up, or way down, your BKC can affect your work and your work relationships. So, here are some tips for neutralizing those big swings and taking more control over your mood and mindset.

Here's what to do and not to do when you're detecting high or low BKC.

Low Blood Kool-Aid Content

Do's:

Spend time with your work besties

Make a list of three small things you will absolutely get done today and tomorrow. Do those things and no more.

Ramp up exercise, sleep, and healthy eating (this will be hard but do it)

Something fun outside of work.

If you can muster:

Thank someone who is currently supporting you

(counter-intuitive) Take recruiting calls. I usually find this forces me to say nice things about the company that I actually believe and it takes me back to the happy state.

Don't's:

Slack your colleagues/go for coffee talks and talk about your frustrations

Give formal feedback to other people you work with

(counter-intuitive) Read your "things I'm proud of" doc. I find I end up minimizing the value/impact of things that once felt very meaningful.

Quit (yet!)

High Blood Kool-Aid Content

Do's:

Write out docs that require a big, bold, and ambitious vision with a whole lot of energy, documentation, state updates, etc.

Make progress on a long term goal

Spend some time in coffee walks with other team/org members

Write out a plan for a low moment that may be right around the corner

Don't do:

Start empire-building or power-tripping

Sign yourself up for loads of new work. Start with one thing.

(counter-intuitive) Give formal feedback. I often find I am overly effusive and the feedback isn't quite accurate but sticks with people.

Don'ts:

Start empire-building or power-tripping

Sign yourself up for loads of new work. Start with one thing.

(counter-intuitive) Give formal feedback. I often find I am overly effusive and the feedback isn't quite accurate but sticks with people.

If you are consistently finding yourself in a high/low BKC, especially if it's through a multiple of 3 or power of 10 phase, ignore everything in this post. In fact, do the opposite of what it says. It's probably time to make a big change.

Tactic Spotlight: Gift Giving

What is it: Thanking and celebrating employees in a way that feels like you. (You can do better than a t-shirt. Hoodie doesn't count as better than a t-shirt. The more unique and specific the gift, the more meaningful it will feel to receive it.)

Company examples, for inspo:

Dropbox did a swag giveaway wherein every employee took a personality survey and the style of the sweatshirt they received corresponded to their responses.

At Medium, every employee received $1k from the company on their birthday to spend however they like. The only rule was they had to make a presentation to the company about how they spent it. This was well-aligned with their culture of storytelling.

At One Medical, every time a new designer joined the team, the person who joined immediately before them buys them a coffee mug and goes out for a coffee (or tea!) break together.

Palantir employees designed 24-themed t-shirts to embody the Jack Bauer penache.

"Safety Third" was a running joke at Uber's self-driving car unit. The team printed stickers with the slogan in OSHA orange.

Deal Toys are popular in investment banking. They typically come in the form of a plaque or lucite tombstone and they're ceremoniously given to the entire team once the deal closes, company IPO's, etc.

At Stripe, new hires got fancy schmancy Bose headphones. It was mentioned during onboarding that wearing your headphones at your desk meant you were heads-down and not to be disturbed. A good cultural cue :)

Tactic Spotlight: Bar Raiser

I've interviewed lots (lots!) of people across lots of different roles. One cool thing that I was part of in my time at Stripe is spinning up and rolling out our 'Elevate Interview' program. The program borrows heavily from Amazon's 'Bar Raisers' program (Doordash calls their version Team Red[1]). The description on Amazon's blog states, "a Bar Raiser is an interviewer at Amazon who is brought into the hiring process to be an objective third party. By bringing in somebody who's not associated with the team, the best long-term hiring decisions are made and we can ensure that the company is always serving, surprising, and innovating for customers." The prevailing principle is that every new hire raises the overall quality of Amazon's talent. Specifically, "every person hired should be better than 50 percent of those currently in similar roles." Stripe's Elevate interview had

One added principle of Stripe's Elevate Interview is that it gives the candidate an opportunity to meet other people from around the organization

Tactic Spotlight: inviting inspiration in

What is it? A way to bring outside perspectives in

When to invoke it? To show off what great looks like (as in, what is the gold standard?).

Ideas for implementation

Start an inspiration channel in Slack or email where people can post things they see out in the world. This is a way to spotlight what great looks like. I would pay a lot of attention to what goes in here. If something is not in fact all that great, make sure you pipe up.

One place to start is by finding great thinkers, on any topic, even those not explicitly relevant to the company's work. It's also a great way for leaders to show their team who they are inspired by or take advice from.

When inviting speakers on a particular topic, consider doing a meal before or after with a smaller group that would really appreciate it and benefit from a hearing from this person in a smaller conversational forum.

Try connecting employees directly with board members to share expertise directly. It's a great way for your employees to get support and for your board members to get to know more of your team.

By creating explicit norms and forums for sharing outside inspiration, your team will be encouraged to look to the outside world more often. (Things in tech can get a little navalgaze-y and you've gotta fight inertia on that one.)

In action

Figma has an #inspiration channel in Slack where anyone at the company can post great work they see others doing.

Companies that have The Whole Earth Catalog, the original ode to tool-building, on display in their lobbies: Stripe, Notion, Figma, OpenAI. Notice anything in common? They're all tools companies.

When Amazon was first conceiving of how to build Amazon Web Services (AWS), Jeff Bezos had his leadership team read Creation, by Steve Grand, a book about the creation of the computer game, Creatures. It influenced the decision to build the forward-thinking cloud-based software based on a set of basic primitives that anyone can build on top of.

The idea for Craisglist was born when founder, Craig Newmark, read Neuromancer in 1984. He says, "that vision of what cyberspace could be, and the way regular people–having no power or influence–could work together to accumulate power from the grass roots up kicked off the imaginations of many people."

Tactic Spotlight: Bar Raisers

What is it? This tactic comes from Amazon. The description on their blog states "a Bar Raiser is an interviewer at Amazon who is brought into the hiring process to be an objective third party. By bringing in somebody who's not associated with the team, the best long-term hiring decisions are made and we can ensure that the company is always serving, surprising, and innovating for customers." The prevailing principle is that every new hire raises the overall quality of Amazon's talent. Specifically, "every person hired should be better than 50 percent of those currently in similar roles."

When to invoke it: When you're concerned that the talent bar is slipping, or might start to soon. When the company leaders can no longer interview everyone.

More musings

I had been meaning to write about this tactic for a while, and just as I finally sat down to do it, I saw that my friend and deeply thoughtful engineering leader, Will Larson had recently published something on the exact topic. And, no surprise, it's packed with wisdom.

So, here's a link to his post on the topic, with insights from his time at Digg, Stripe, Uber, and Calm. He also covers hiring committees (having a pool of interviewers and hiring manager make a collective decision) and structured approval (increasingly escalated decisions on a candidate).

Bar raisers, hiring committees, and other complex ways to improve hiring quality.

When Uber Engineering reached 800 engineers, engineering was divided across roughly five engineering directors. Most engineering and process issues were resolved locally within these five organizations. This worked well for the most part, but meant there was little consistency within our core proces…

Irrational Exuberance

In the end, Will advocates against the bar raiser system (unless there is a good reason the other approaches don't work). I, on the other hand, am a strong advocate for this system. When done right, I've found it helps orient the entire company around a set of qualities that every employee should have in common (and stave of cultural factions between teams). I also find it's a nice recognition system for current employees (it should be an honor to interview as a Bar Raiser) and nice experience for candidates who get the opportunity to meet other people around the organization.

I can also say that I interviewed for the Bar Raisers equivalent at Stripe (we called it Elevate) and I loved it because it gave me a good reason to spend time with colleagues on teams further away from mine that I might not encounter otherwise. And, it made the new hires feel a bit more familiar–there was usually at least one or two faces I recognized in each incoming class, which kept the organization feeling a bit cozier for longer.

Making crossfunctional projects more satisfying to work on

Crossfunctional projects are often some of the most dynamic and interesting. You get to talk to lots of different kinds of people, access new tools, and tap into a diverse set of skills. These are also the projects that are particularly susceptible to inefficiencies and colleagues grating on each other. These inefficiencies are often exacerbated as the company, and its lattice of cross-team dependencies, grows.

The better we are at project management, the more productive we can be and, as a result, the more satisfying the work will feel.

1. Trust > Buy-In

If you find yourself on a mission to 'get buy-in,' change your mission. 'Buy-in' is cheap and lends itself to bargaining and politicking. (Plus, doesn't the term 'buy-in' give you the ickies?) Trust is ultimately much more powerful and enduring because it relies on that deep, internalized feeling that "they've got this."

At the outset of the project, earn trust by doing research, talking with experts, understanding stakeholders (not just decision makers), and earnestly exploring the challenges. Explicitly time-box that process. Then, from this place of understanding, clarify your own point of view and use that to guide and communicate the direction of the project. Once the project is underway, you can maintain the trust by taking responsibility for not only the vision, but also the day-to-day work required to get things done.

Gut check: At the outset of a project, are you doing more talking or listening? During the project, does your team come to you for input and advice?

2. Tight Deadlines are motivating

A less obvious benefit of clear and explicit deadlines is that they provide a construct to rally behind. Above all else, each team member is accountable to the objectives of the project and deadlines help the group efficiently get there. Context for the deadline will also help—is there external pressure to hit a date? Why? Does other work depend on this work?

The expectation is always that deadlines are hit and that everyone should work together to make sure that happens. This means that missing a deadline feels bad and that hitting a deadline feels good. Relatedly, stretching for and hitting a deadline feels really good. A project manager can push the team to stretch for a deadline, but should be judicious about doing so. You can only provide your team with celebratory cookies so many times.

Gut check: If you pulled one of your stakeholders aside and asked them what the next deadline was, would he/she know? Are you consistently hitting deadlines? Missing them?

3. You can't beat the biweekly update

The project manager is going to know more about the state and progress of the project than anyone else. Get the information out of your head and into the hands of your stakeholders. The weekly update (or, whatever cadence works for your project) is always the best way to keep stakeholders and onlookers informed. Content and structure can vary, but the weekly update always wins. It just does. Don't worry about over-communicating or over-informing, especially at the outset. Most prefer over-communication for work they're invested in.

When you do write your weekly email, ensure your email is informative and compelling by writing it for your audience, not for yourself. What does your audience care about? What do they need to know? What happened since the last update that you found interesting?

Gut check: Do stakeholders respond to or cite your email? Have you noticed it being forwarded to others? If an onlooker were to seek state, would they be able to quickly find it?

4. Meetings are not the only accountability mechanism

Before you schedule that weekly meeting, consider whether the content benefits from in-person communication. As a general heuristic, a decision that requires discussion benefits from a meeting, while a status update is better handled asynchronously. If you do have a meeting, make explicit (in advance) why the group is gathering and what the expected outcome is.

Gut check: If you have a weekly meeting, do stakeholders attend? If so, are they engaged? Did you send out the meeting agenda in advance?

5. How your stakeholders think you are project managing is how you are project managing

Include introspection and feedback-gathering into your own process as a project manager. Periodically revisit overarching questions—how are we tracking against the plan? Where is our time going? Who haven't I heard from in a while? Who am I hearing from more than expected? Periodically collect feedback, and not in a 'check-the-box' kind of way. Ask specific stakeholders specific things you are thinking through. (This has the added benefit of helping to establish and maintain trust). From there, don't be afraid to change up the process!

Relatedly, when a stakeholder or onlooker offers you feedback, try to get to the root of what they are telling you. Make a decision about whether the feedback should precipitate a change and communicate that decision back.

Gut check: Are you getting the same questions from multiple people? Are you requesting generic feedback by saying 'let me know if you have any questions/feedback'? Or, are you asking for feedback on specific areas from specific individuals?

What are non-obvious roles I should I consider hiring for early?

In startup land, where the dynamics of the business and company are constantly changing, there's always work to be done that isn't formally owned by any one person, function, or team. This means accepting the fact that there's almost always going to be company-critical work that gets deprioritized and/or slips through the cracks over the short term. And, this comes from the right approach which is to avoid early bloat at al costs. But the risk is that these cracks become foundational fractures that put the company at long-term risk.

To minimize that risk, here are some roles to consider hiring for earlier than "when it's on fire," what their charters might be, and projects they might ship/workstreams they might own.

I'd recommend reserving these roles for junior team members and giving them a manager that is a great mentor, even if not a domain expert. What they lack in experience, they'll likely make up for in flexibility, a tolerance for papercuts, and a willingness to do the hard work. In my experience, these team members also turn into great culture fits and loyal team members that move in to other roles and do a fantastic job there.

Onboarding: Ensuring new team members are warmly welcomed and set up to be successful as efficiently as possible. (Ship/own: new hire curriculum, new hire IT setup, communication between offer signed and start)

Internal comms: Keep the pulse on the internal discourse and bend it in the direction of the company's identity. (Ship/own: All Hands agenda and execution, communication guide, wiki maintenance)

Social: Keep the pulse on the external discourse and bend it in the direction of the company's aspirations. (Ship/own: responding to/routing user requests, sharing user feedback with product teams, being a productive/generative voice).

Salesperson: Source and advance customer deals. (Ship/own: lead lists, project managing deals, customer-facing communication, CRM).

Recruiter: Bring great talent into the organization. (Ship/own: candidate outreach, careers page, interview scheduling)

Executive business partner: Free up executive time and bandwidth for high-priority company initiatives. (Ship/own: exec scheduling, offsite organization, calendar maintenance)

Bizops: Tackle any high-priority and unowned projects the company needs.

Putting software to work on company culture

Those of you who have been following along for a while know how deeply I care about this work. After being a part of great organizations like Stripe, Figma, and Google changed my life, researching and writing about the habits of ambitious, high-performing felt like the highest impact thing an operations wonk with a proclivity for the written word could work on.

I can't believe I'm saying this...but I'm going to try and put a piece software to work on the challenge of cultivating more of that "we're all in this together feeling."

Because for ambitious organizations that pride themselves in cultures of autonomy and distributed ownership, that feeling is fuel.

Constellate will be a collectively-curated feed of work-in-progress that anyone, in any corner of an organization, can rely on.

The core functionality of feeds and upvotes and reactions will feel familiar. But doing it at work with a community of trusted colleagues you're already building with and rooting for will feel different.

Here's where you can read more about Constellate (and, raise your hand to stay in touch or get involved). I hope you do because I think we've got a shot at transforming more organizations into the sources of community and self-actualization they should be.

Arc, Sequoia's seed-stage catalyst, is in Constellate's corner (I'm still pinching myself) and over the next few weeks, they're going to have me and 28 other founders hard at work learning how to build enduring companies.

So, for the next little bit, I'm going to be giving Constellate my full attention and you won't see as many emails.

I hope you stick around (and maybe use this break to poke around the archives), because I'll be cooking up something especially for you, dear readers. But, if you want to unsubscribe until I can tell you more about exactly what that is, I won't hold it against you.

Thanks, as always, for being here.