



# CULTURE OPERATIONS PLAYBOOK

"A GUIDE OF OUR COMPANY CULTURE"

2023





# *Our* COMPANY CULTURE



How we interact, the values we share, and the decisions we make.





# MEET OUR COMPANY

HERE ARE 5 FUN FACTS ABOUT CULTURE WORKS.

1

On April 1st, 2020, we left the first business and rebranded as Culture Works, creating a different business model aligned with the right purpose, people and processes. The intention is to build people with an outcome of building business.

2

Our CEO has an extensive background in Human Resources, Operations, Building & Scaling Companies, and Emotional Intelligence.

3

We used to have an office in Carlsbad, CA. However, our future vision has been expedited and we currently work hybrid. Mostly from home, on client sites as needed, and as often as needed together in a coworking space.

4

Today, we have 19 Team Members, serving small to midsize businesses in a wide variety of Industries across multiple states. We believe in Customizing, Humanizing, and Simplifying the impact and experiences of each of our team members and each of our clients.

5

Our 5 year plan includes healthy, sustainable, organic growth that produces rich referrals from employees, clients, and referral partners that will be supported by a growing, innovative and impactful team in multiple states.



Hear more from the team.



# WELCOME TO CULTURE WORKS!



"Our Purpose is to ultimately build people (purpose for people) and protect businesses (partnerships of all kinds).

How Do We Do It? Through alignment (value and culture) and as individuals through our individual game success factors."

- Kristi Pastore, CEO | Purpose & People Officer



## PURPOSE STATEMENT

We align **purpose**, **people** and **process** to maximize success through dynamic culture operations

### *What is your PURPOSE?*

- What do you want to impact?
- What values are important to you?
- What's your jam?

## VISION STATEMENT

We are **creative doers** impacting people and scaling business purpose

### *What is your VISION?*

- What do you see in your future?
- What do you want to create?
- Who do you want to be?
- Where do you want to be?

## MISSION STATEMENT

We are the **consultants of service** empowering people and protecting partnerships in business

### *What is your MISSION?*

- How will you do this?
- What is your plan?
- What will be your success indicators?





# CULTURE WORKS VALUES



## MOMENTUM MAKERS

We are a team that moves the needle forward while maintaining focus on empowering leaders and strengthening culture.



## GAME CHANGERS

We get sh\*t done, drive results, and take action on undiscovered opportunities.



## IMPACTFUL INNOVATORS

We help people evolve faster and further, serving as a catalyst for change through building strong relationships.



## TRANSPARENT PARTNERS

Authenticity is everything to us. We provide value by taking on each new partnership with an open, honest, and creative approach.



## TENACIOUSLY FUN ENERGIZERS

We are enthusiastically determined to approach work and life in a refreshing and daring way.

## OUR VALUES IN ACTION



### MOMENTUM MAKERS

#### Our culture – Who we are

- Create efficient working sessions
- Build QGPs in collaboration with clients & COS Team
- Create ownership and accountability
- Create healthy cadence- at a minimum, book next meeting after each appt
- Leverage technology



### GAME CHANGERS

#### What our brand represents – and what we do differently

- Client lifecycle advancement- we meet clients where they are & help them evolve!
- Consultants of Service – we are hands-on and fully integrated with each client!
- Out-of-box solution recommendations – we are not your normal HR!



### IMPACTFUL INNOVATORS

#### Why we are here - we want to impact and innovate for us and for our clients!

- Cross Training: Internal team is aligned & collaborative
- Creative Template Process (CTP): Utilized to capture/evolve internal processes, procedures, and best practices
- Product development & continuous improvement
- OneNote/SharePoint: Client documentation storage and collaboration, templates & meeting notes evolved and stored for all team access



### TRANSPARENT PARTNERS

#### How we do business - internally and externally

- Client and referral partner alignment of expectations, services and value
- Role Alignment internally and externally – no egos!
- Quarterly Game Plan: Collaborative planning for clients to forecast and deliver results Shared Calendars: Maximize time management, collaboration and efficiency
- Open Communication: Build awareness & streamline internal/external sharing methods Define and discuss
- appropriate communication: shared OneNote, instant messaging, email, text, or phone



### TENACIOUSLY FUN ENERGIZERS

#### Our voice, our traits, our brand

- Open and refreshing, be YOU, have fun, be daring and different! Discuss and evolve professional role alignment
- Create team accountability around personal goals and evolution
- Individual development & internal Learning & Development opportunities
- Choose your style of work-life integration or work-life balance
- Hands-on opportunities to learn and integrate with clients
- Work with a genuine & caring team for collective success



# Unity is Strength

## OUR AWESOME TEAM!

### LEADERSHIP

CEO | Purpose & People Officer



### CLIENT TEAM

Culture Operations  
Talent & Recruiting  
Consulting



### OPERATIONS

Internal Culture Operations  
Sales Specialist  
Business & Branding Ops  
Internal HR  
Accounting



Learn more about our services



# Meet Our PEEPS

## #15

People at  
Culture Works

### CULTURE OPS

Simone  
Culture Ops  
Partner - DTM



Kelley  
HR Business  
Partner - DTM



Heather  
HR Business  
Partner - DTM



Tim  
HR Business  
Partner - DTM



+1 Unicorn  
CW Mascot



Lea  
HR Generalist  
- CTM



Cymbre  
HR Generalist II  
- CTM



Molly  
HR Coordinator  
- CTM



Margie  
Sr. HR Generalist  
- CTM

### TALENT

Cocco  
L&D Specialist



Karla  
Talent Specialist



Maria  
Talent Coordinator



Rachel  
Talent Scout

### OPERATIONS



Amber  
Culture  
Operations



Jenn  
HR Consultant  
Internal HR Ops

### CONSULTING

Kristi - CEO | Purpose & People Officer



Want to  
know more  
about us?



# 2023 CULTURE & PEOPLE INITIATIVES

PURPOSEFUL team initiatives that create personal engagement & establish **ACCOUNTABLE** internal culture operations.

## Tenaciously Fun Events

### WEEKLY

- Friday Feels

### QUARTERLY

- Virtual Team Building Activities

### YEARLY

- In person Team Building and Media Day Workshop

## Team Collaboration

- Weekly Company Meetings
- Weekly Jam Sessions & Team Huddles
- Working Sessions
- Monthly All-Hands on Deck

## Team Recognition

- Weekly Meeting Shout-Outs and Wins
- Team Member Birthdays & Work Anniversaries
- New Hire Welcomes
- Company Values Recognition
- People's Choice Awards
- Monthly MVP Awarded Self-Care Gift Card

## Team Success

- Quarterly EQ Growth Goals
- 30-60-90 GamePlan
- Weekly New Hire Check-ins
- Monthly Performance Success Meetings
- DiSC Assessments & Training
- Company and Self-Driven Training, Development & Success Indicator Mapping
- EQ, Workstyle, & Strengths Assessments



## Quarterly Reflect - Reset - Rise

## Work|Life Balance Perks & Practices

## Semi-Annual Employee Surveys

## Culture Ops Playbook







# AROUND HERE, FEELINGS MATTER.



1. EVERYONE HAS A SEAT AT THE SAME TABLE. (A BIG TABLE)



ACTUAL PHOTO!



2. EVERYONE HAS ACCESS TO EVERYTHING. WE HAVE NO DOORS. EVERYONE WORKS ON EVERYTHING. (THERE ARE NO ISLANDS. IT TAKES A COMMUNITY TO DO THE WORK WE DO.)



3. WE ALL HAVE A VOICE. (IF YOU ARE NOT STUCK ON ZOOM MUTE THAT IS) THEY ARE HONEST, UNFILTERED, AND SOMETIMES LOUD ONES.



4. WE COMPETE FOR A FUN GAME BASED TROPHY, NOT A CORNER OFFICE (WE PROMOTE SELF WORTH AND MANAGEMENT.)

# *The* **TEAM MEMBER EXPERIENCE**



Everything we learn, do, see, and feel as we integrate into the company.



# THE ROADMAP TO SUCCESS, OUR GAME SUCCESS FACTORS

1

Your Individualized  
**PERFORMANCE SUCCESS SYSTEM**



2

Purpose and Culture...  
**CLIENT SUCCESS**



3

People and Evolution...  
**TEAM SUCCESS**



4

Process and Alignment...  
**BRAND SUCCESS**



**VALUE ALIGNED  
SUCCESS!**



And then it happens...

One day you wake up and  
you're in this place. You're in  
this place where everything  
feels right. Your heart is calm.  
Your soul is lit. Your thoughts  
are positive. Your vision is  
clear. You're at peace, at peace  
with where you've been, at  
peace with what you've been  
through and at peace with  
where you're headed.

- Author unknown



# My First Week at Culture Works



My Name is

ME

My Title is

Individually Role Aligned

Like Everyone, I report to

Kristi Pastore directly

This week I....

Received SO many fun things in the mail. All my office equipment, AND.... a SWAG BOX! It had so many personalized items inside. I felt pretty special.

- I started the morning of my first day with a meet and greet with the CEO, it's so nice to have that direct link and feel so welcomed, all my first-day nerves went away.
- The CEO provided me with a calendar for my first two weeks, so I knew exactly where I needed to be and what I'd be doing from day one. Talk about easy integration. Daily trainings were all set up to learn the different systems and tools, the company's best practices, and all the things I need to embrace the Culture Works way.
- I met all of my new team members in our weekly team meeting. They kick off meetings with their shout outs and wins, they REALLY are tenaciously fun energizers. It's contagious!

This first 90 days, I am excited to...

Receive my customized 30-60-90 GamePlan, establish my success indicators, and jump in on projects with the team so I can successfully hit the ground running IMPACTING PEOPLE & BUSINESSES.



# IT STARTS WITH YOU, AND YOUR PERFORMANCE SUCCESS SYSTEM



## 0 - 90 DAYS **ONBOARDING**

*Drinking from the firehose and learning all you can. We encourage you to ask questions and raise your hand!*

- 100% **30-60-90-Day GamePlan**

### **GamePlans:**

- Are self-guided
- Foster team collaboration
- Include 50% self-awareness & role training + 50% project work participation
- Are shared with other team members, creating collective awareness, and aligned success indicators
- Progress is checked in on weekly with the CEO for questions and feedback
- Are reviewed monthly with the CEO and evolve based on progress



## 90 DAYS - 1 YEAR **WORK HARD**

*Your first year is all about working hard toward Role Alignment!*

- **Client Team** | 100% client-facing or client projects
- **Ops** | 100% role aligned with functional ownership
- **Performance Success System** | Monthly 1:1 Check-ins with the CEO



## 1 - 3 YEARS **GROW BETTER**

*It's all about getting better and better as you learn, evolve, and improve your skillsets.*

- **Client and Ops Team** | Eligible to remove 100% capacity from role or clients and add Value Contributor (VC) capacity in leading leaders, leading process, or leading business
- **Performance Success System** | Quarterly 1:1 Check-ins with the CEO



## 3-5 YEARS AND BEYOND **PLAY HARDER**

*You've got this! Now is the time to rebalance work & life and check in with all the things you love.*

- **Client and Ops Team** | Eligible to remove 100% capacity from role or clients and add VC capacity in leading leaders, leading process, or leading business
- **Performance Success System** | Quarterly 1:1 Check-ins with the CEO



# OUR PERKS

"Realize that everything connects  
to everything else"  
- Leonardo da Vinci



## "COLLECT MOMENTS, NOT THINGS"

Robust Vacation Time

California-Based Paid Sick Leave

10 Paid Holidays (including your birthday or  
work anniversary)

## "SHOW ME THE MONEY"

401K Retirement Plan

Monthly Work From Home Stipend

Monthly Cell Phone Reimbursement

One-Time Home Office Set-Up Allowance

Culture Works Bonus Program



## "YOU DO YOU BOO"

Medical | Dental | Vision | Life | Pet | Wellness Insurance Plans

Hybrid Work Model (work from home & office)

Flex Time\*

Educational Reimbursement

Employee Referral Program

\*After a successful 30-60-90 GamePlan period is completed



# total compensation package.

We Bring It - You Do It - We Got this!



Culture Works

purpose ▶ people ▶ process

## culture works = aligned success to truly **do you**

We want everyone on our team to:

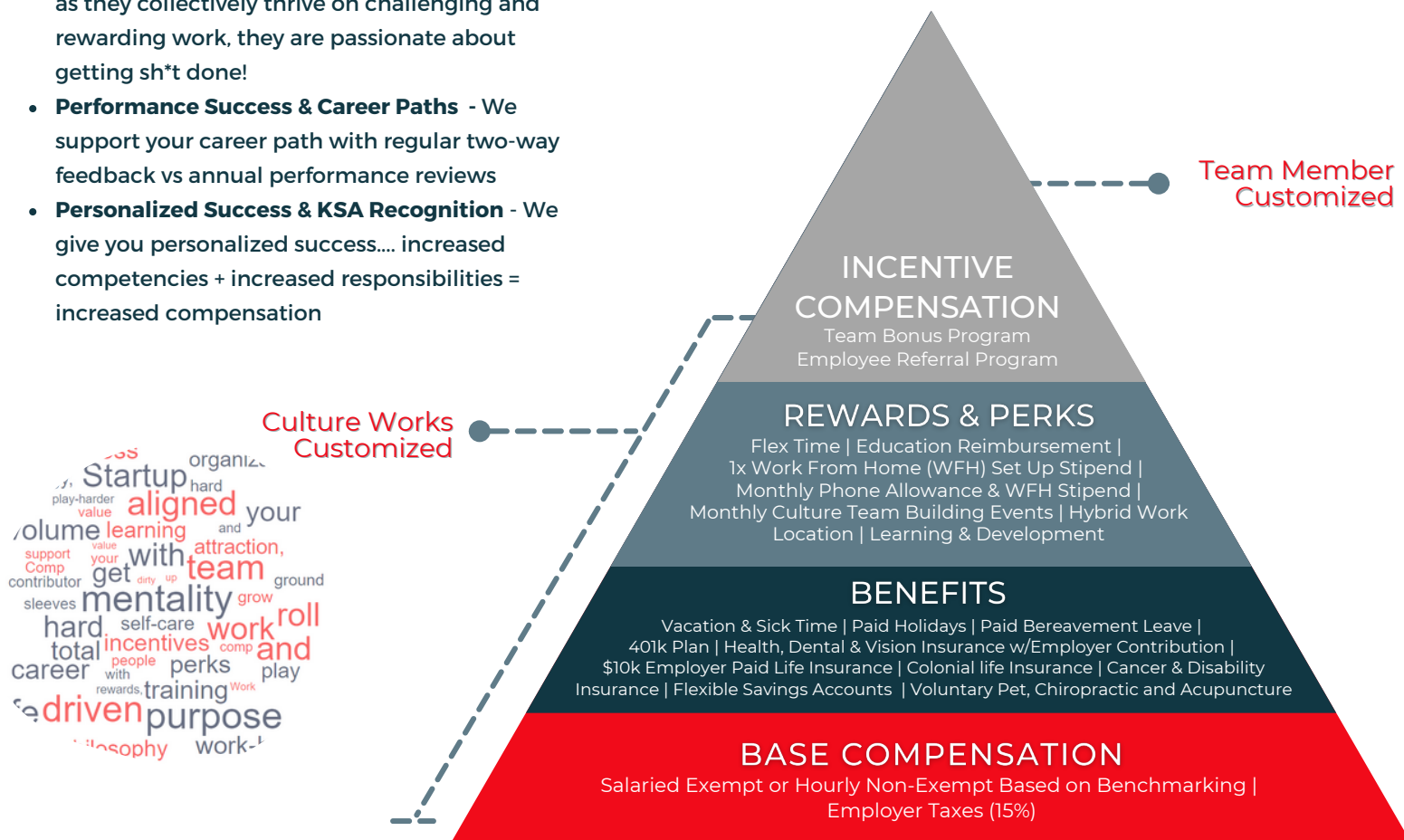
- DO WHAT YOU LOVE
- LOVE WHAT YOU DO
- Give us feedback on what matters to YOU: culture, money, incentives, rewards and recognition
  - you speak we listen we talk we implement

## what we **do**

- **Role Aligned Compensation** - your compensation is aligned with **your** role vs. annual merit/seniority/ cola increases
- **Reward Performance** - We encourage our team as they collectively thrive on challenging and rewarding work, they are passionate about getting sh\*t done!
- **Performance Success & Career Paths** - We support your career path with regular two-way feedback vs annual performance reviews
- **Personalized Success & KSA Recognition** - We give you personalized success.... increased competencies + increased responsibilities = increased compensation

## what we **offer**

- **Learning Organization** - resulting in increased team member KSA's via experiential development and continuing education
- **California Base Rates** - All employees, regardless of location, are paid at California benchmarked rates aligned with their individual role, KSAs and experience
- **Incentivized Team Success** - Bonus Program designed to incentivize collective team success
- Monthly MVP Awarded a Self-Care Gift Card
- Generous Vacation and Sick Time
- Medical | Dental | Vision | Life, including chiropractic, acupuncture, and pet insurance
- Basic 401k Plan
- Flexible Work Schedule & Hybrid Work
- TONS of Rewards & Perks





# Employee Referral Program



Refer a friend and receive up to a  
**\$1,000 bonus**  
for each referral hired!\*

Recruiting top talent can be a challenge . . . finding candidates who are a culture fit can be an even greater challenge! This is where you can help us grow our team by referring candidates that align with our values to be:

Momentum Makers  
Game Changers  
Impactful Innovators  
Transparent Partners . . . and  
Tenaciously Fun Energizers!

- Bonus payment schedule:
  - after 30 days = **\$100**
  - after 60 days = **\$100**
  - after 90 days = **\$100**
  - after 120 days = **\$700**
- New hire must be employed more than 120 days for referring employee to receive the full \$1,000 bonus.

\*See Employee Referral Program Policy for details.



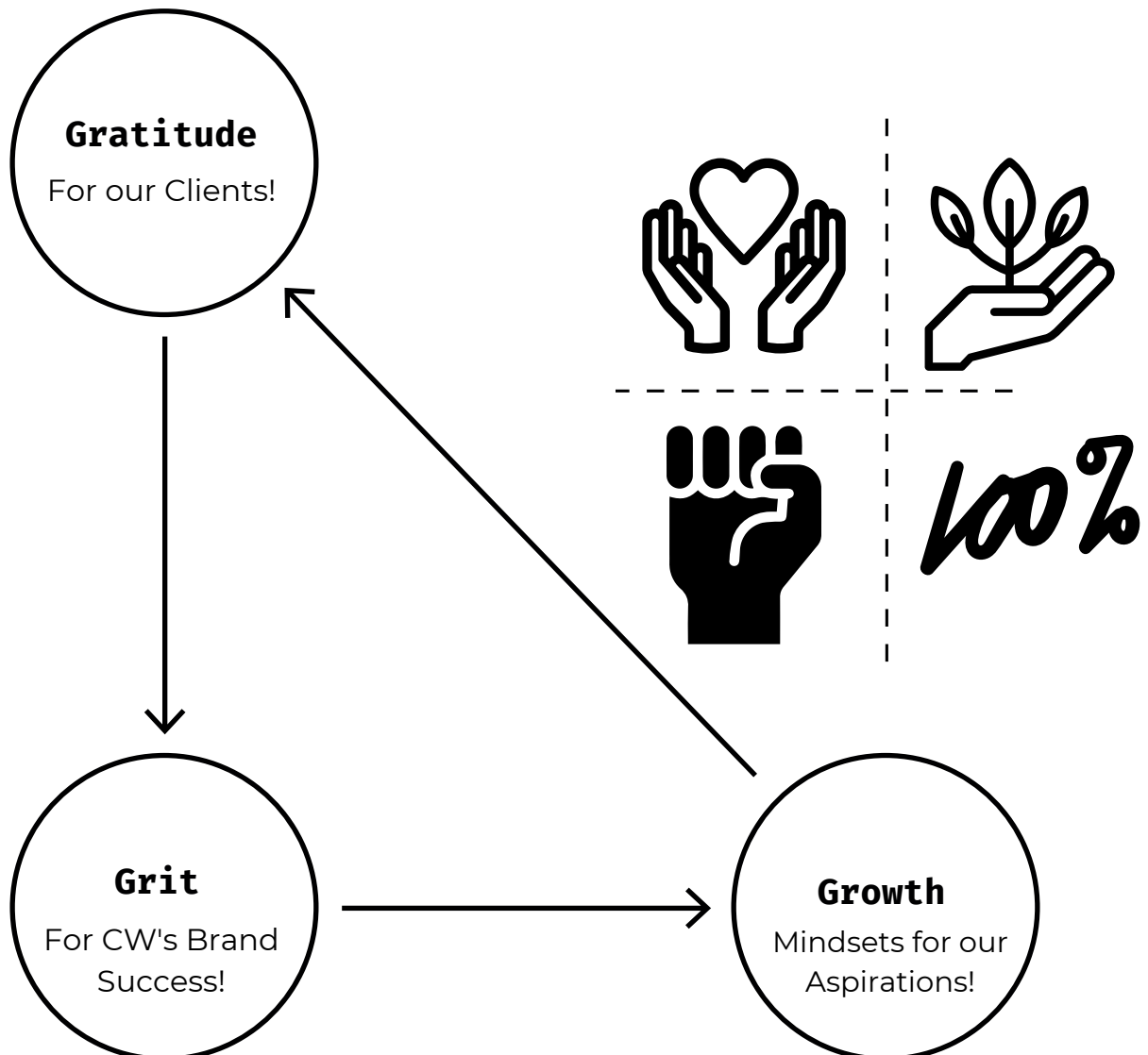
# *How we do* **BUSINESS**



Little tricks for big success.

# FOCUS ON THE GOOD THINGS

2023





# HOW YOU SHOW UP!

## BECAUSE IMPRESSIONS MATTER....

### Internal & External Meetings | Online & In-Person

#### (P)URPOSE

During your employment at Culture Works, you are representing our brand and culture. How you “show up” is key to your success and our company’s future! These three “Ps” will guide you in making an impressive impression!

“Once an impression is formed, it’s very hard to change it”

#### (P)REPARE

- Coordinate with team members to have an agenda and discussion points
- Clearly identify who owns what parts of the meeting.
- Show up on time; if online, video always on!
- Keep meetings on track and be mindful of the time
- Be welcoming and begin with introductions
- Be present – engage and be ready to contribute!
- Document – agenda and meeting notes in the client’s OneNote section



#### (P)ERSONAL APPEARANCE

##### Client Meetings

Align with the Client’s dress code policy

##### Culture Works Meetings

Wear work-appropriate casual attire unless otherwise specified

Proper grooming, hygiene, and clean clothing is always expected and required

#### PROTOCOLS

- Make sure all meetings are Purposeful and/or Productive
- Cell phone volume off and out of sight
- Mute microphone when appropriate
- Avoid eating food during client meetings
- Technology notifications are silenced or off
- Avoid emails and IMs during meetings
- Use MS Teams / Zoom background feature if your location is not presentable
- Limit distractions - no pets or humans in your background



HUMANIZE | CUSTOMIZE | SIMPLIFY

# What Makes Us....Us?

- Purpose, People and Role Alignment
- Team Engagement
- Culture and Value Alignment
- Business Owner Advocates
- Operationalizing Culture
- Impact and Results

**BUT ENOUGH ABOUT WHAT WE THINK...LET'S ASK THE TEAM**



We help clients build kick-ass company cultures!!!



We help client companies build better scalable processes which operationalize culture



*We take it from crayons to paint. Use our experience for the good of all. Think outside the box, always curious, improving, evolving, and innovative*



We help energize workplaces and move the needle forward in our client's businesses



We help develop employees and implement processes so they are aligned with the purpose and goals of the company



We are passionate about helping HR + Operations work together!



*We don't take ourselves too seriously, even though we deal with serious topics*



We're not afraid to have hard conversations because we believe in keeping it real, being transparent, and coming from a place where we have the client's best interest at heart!



# CLIENT & BRAND SUCCESS



We operationalize good culture that works for ALL!



Align people and process

Drive results

Create peace of mind

# Culture Works Speak

## **cos**

*culture operations specialist*

## **csa**

*client service agreement*

## **ctm**

*committed team member*

Integrated into the Culture Ops Client QGP for specific areas of ownership. Typically client facing 10 - 20% of the time.

## **ctp**

*creative template process*

The CW's term for standard operating procedures. In our world, processes are always evolving, never stagnant like a traditional SOP.

## **dtm**

*dedicated team member*

Partners with the Client Owner & HR Stakeholders to develop, evolve and manage the QGP on Culture Ops Accounts. Owns the client relationship, and brings in CTMs as needed. Client facing 70 - 80% of the time.

## **eq growth**

*emotional intelligence growth*

Quarterly individual emotional intelligence goals set by each team member, we discuss them during our Monday morning meetings.

## **hra**

*human resources assessment*

Product we offer in which we perform a strategic and tactical assessment of a company's hr infrastructure, and provide a detailed report to the client company.

## **hubstaff**

time tracking system for internal impact and/or client service metrics.

## **onenote**

Our team collaboration tool. They are online notebooks that house client activity, internal procedures, team info, meeting agendas, etc.



## **pss**

*performance success system*

Your roadmap to your personal success at CW from your 30-60-90 GamePlan through your entire employment lifecycle.

## **qgp**

*quarterly game plan*

A collaborative and results-driven roadmap of priorities developed in partnership between the DTM and the client stakeholder.

## **resources page**

*hr resources one note tab*

The usernames and passwords for HR resources we use in our day-to-day are located in the OneNote Resources page.

## **sharepoint sites**

**Team Site:** All Culture Works online files are housed in this area, including client files.

**External Client Sites:** site for some clients used to share documents, including sensitive data (limited access).

**Recruiting Site:** used by the Talent Acquisition team.

## **VC**

*value contributor*

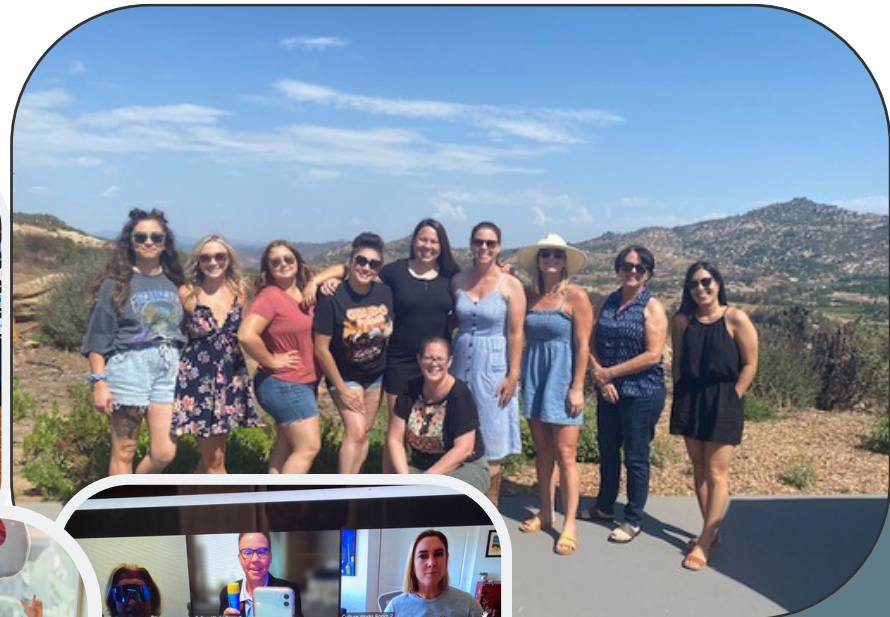
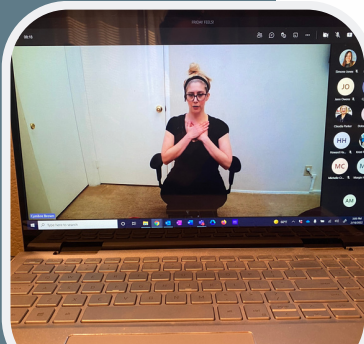
After one year of employment, team members may be approved to be a company contributor, and have value contribution capacity in the areas of: leading profit, leading leaders, and leading business.





Life at

# CULTURE WORKS



Work Hard, Play Harder

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# WE ARE A MODERN WORKFORCE.

We don't conform to a single work environment because team members work differently. We have a work policy that allows team members the flexibility to choose their work schedule and location based on their needs, taking into consideration specific client needs, of course. As Consultants of Service, performance and culture accountability are most important.





# OPERATIONALIZING FLEX TIME

FLEX TIME = MANAGING YOUR ENERGY, BOUNDARIES AND TIME

THE WHY OF MEETINGS - ALIGNING THE **PURPOSE**

THE HOW OF MEETINGS - CREATING A **PRODUCTIVE OUTCOME**

Assess and Identify the Meeting TYPE

*Time Ranges can fluctuate based on format and size of participants*

## MEETING TYPES @ CW

<u>HUDDLE</u>	<u>MEETING</u>	<u>WORKING SESSION</u>	<u>CHECK-IN</u>	<u>1:1</u>	<u>TRAINING</u>
<ul style="list-style-type: none"> <li>Updates, focus, priorities (ex: Tuesday Team Huddle)</li> <li>Due dates, action items, ownership</li> <li>Debriefs</li> <li>Outline obstacles &amp; roadblocks</li> </ul>	<ul style="list-style-type: none"> <li>Provide collective awareness (ex: Team Mtg, AHOD)</li> <li>Engage in productive discussion</li> </ul>	<ul style="list-style-type: none"> <li>Collective team brainstorming, best practices, problem-solve</li> <li>Learn &amp; flow of work. Do   Build   Teach (ex: Jam Sessions)</li> <li>Team Member &amp; Client Facing</li> </ul>	<ul style="list-style-type: none"> <li>Need clarity, direction, commitment, expectations or alignment</li> <li>Hard conversations, feed forward feedback</li> <li>Team Member &amp; Client Facing</li> </ul>	<ul style="list-style-type: none"> <li>Development &amp; coaching</li> <li>Career path or PIP</li> <li>Performance Success System</li> </ul>	<ul style="list-style-type: none"> <li>Learning</li> <li>Educational</li> <li>Directive, and/or</li> <li>Informative</li> </ul>
10-30 MINS	45-60 MINS	30-60 MINS	20-30 MINS	15-60 MINS	30-50 MINS

## CREATE MEETINGS THAT INSPIRE!

Evolve our **CULTURE** through meeting preparation that creates inspired action to be a **MOMENTUM MAKER** and foster being a **TRANSPARENT PARTNER**

### IDENTIFY THE INSPIRATION BEHIND THE MEETING

- Why:** What is the **Purpose**
- How:** Create a **Productive** outcome
- Success Indicators:** Identify how it will be **Productive** and **Purposeful**

### MEETING OWNER:

#### PLAN, PREPARE, ORGANIZE

- Coordinate calendar & agenda
- Be prepared to lead the meeting
- Give others ample notice & time to prepare (the more time the better, no same day expectations)
- Include the why, the high-level agenda and/or subject in the calendar invite

### CONFIRM MEETING

- Always confirm the meeting the morning of, or the prior day
- Why?** To foster the importance of a productive and purposeful mindset so people are present and manage their time or distractions accordingly

## MEETING DETAILS MATTER!

The **WHY & HOW** of a meeting helps create the **PURPOSE & PRODUCTIVITY** levels directly tied to **ENGAGEMENT & INTENDED** outcome

*Customize times and topics based on number of heads and purpose*

### SCHEDULING MEETINGS: Things to Consider

- Frequency
- Cadence
- Time zone & most productive time for all
- Mindset
- Agenda
- Adequate prep time for all
- Book 3 weeks out, but leave time for reactivity
- Functional ownership assigned, reduce side-meetings

### REDUCE MEETINGS: Know When to CALL vs MEET

- Identify discernment in your service offering
- Not everything has to be a meeting, use your channels effectively: channels for specifics, text for urgent or quick
- Be the change agent, evolve culture through transparent relationships
- Continued and transparent feedback is healthy in safe spaces

**CULTURE EVOLUTION** with **ONSITE INTERACTION** and **CONTINUOUS FEEDBACK**

### SHOW UP READY TO INSPIRE

- Open Communication Culture:** no distraction, mics on, video on, use reactions/emoji's, BE PRESENT!
- Mindset:** treat it as if you were onsite
- Review:** "How You Show Up" Flyer

### OFFSITE VS ONSITE

**Top two reasons clients & business owners struggle with no onsite employees:**

- Onsite promotes interaction & engagement which inspires innovation, action, & alignment
- Reduced awareness, confidence, trust, or data to make informed decisions

**How do we help them bridge the gap and lead by example? This is a HUGE way!**

### SAFE SPACES

- If you don't personally apply feedback it won't be taken personally
- When providing feedback, focus on the process, not the person
- The specifics, the competencies, and the skillsets are what is broken, missing, or needs to be improved
- Don't focus on the person

## MEETINGS THAT FOSTER CULTURE EVOLUTION

# CULTURE WORKS

## Operating System



### MONDAY



9 AM (PST) Weekly : MONDAY TEAM MEETING



10:30 AM (PST) Weekly : [TALENT TEAM](#) HUDDLE

### TUESDAY



9 AM (PST) Weekly : [CLIENT TEAM](#) HUDDLE

### WEDNESDAY



9 AM (PST) Weekly : JAM SESSION



1 -2 PM (PST) 1ST WED OF THE MONTH: [CLIENT TEAM](#) STRATEGY

### THURSDAY



*just breathe*

### FRIDAY



1 PM (PST) Weekly - FRIDAY FEELS

#### QUARTERLY: REFLECT - RESET - RISE

JANUARY - 1/23/23

APRIL - 4/10/23

AUGUST - 8/14/23

OCTOBER - 10/16/23

#### ALL HANDS ON DECK

FEBRUARY - 2/13/23

MARCH - 3/13/23

JUNE - 6/12/23

DECEMBER - 12/11/23

#### \* TEAM BUILDING AND MEDIA WORKSHOP

SEPTEMBER - 9/21/23-9/22/23

#### \* MONTHLY TRAINING & LEARNING

2ND TUESDAY - CULTURE, LAWS AND LATTES

3RD TUESDAY - HARASSMENT TRAINING

4TH TUESDAY - L&D WITH CW COMMUNITY



# JAM SESSIONS

WEDNESDAYS 9 AM PST

\*TEAM FACILITATOR

2023

EQ WITH KRISTI	JAN 4
CLIENT TEAM STRATEGY	JAN 11
HEATHER STEWART	JAN 18
TBD - BASED ON CURRENT EVENTS	JAN 25
GUEST HOST - PREFERRED PARTNER	FEB 1
SIMONE JONES	FEB 8
THE GOODS	FEB 15
TBD - BASED ON CURRENT EVENTS	FEB 22
CLIENT TEAM STRATEGY	MAR 1
EQ WITH KRISTI	MAR 8
KELLEY BLASCO	MAR 15
TBD - BASED ON CURRENT EVENTS	MAR 22
SABRINA VONCH	MAR 29
TBD - BASED ON CURRENT EVENTS	APRIL 5
CLIENT TEAM STRATEGY	APRIL 12
THE GOODS	APRIL 19
TBD - BASED ON CURRENT EVENTS	APRIL 26
EQ WITH KRISTI	MAY 3
GUEST HOST - PREFERRED PARTNER	MAY 10
TALENT TEAM	MAY 17
CLIENT TEAM STRATEGY	MAY 24
TBD - BASED ON CURRENT EVENTS	MAY 31
SIMONE JONES	JUN 7
COS TEAM	JUN 14
THE GOODS	JUN 21
TBD - BASED ON CURRENT EVENTS	JUN 28

CLIENT TEAM STRATEGY	JUL 5
EQ WITH KRISTI	JUL 12
KELLEY BLASCO	JUL 19
TBD - BASED ON CURRENT EVENTS	JUL 26
GUEST HOST - PREFERRED PARTNER	AUG 2
HEATHER LYNCH	AUG 9
CLIENT TEAM STRATEGY	AUG 16
THE GOODS	AUG 23
TBD - BASED ON CURRENT EVENTS	AUG 30
SIMONE JONES	SEP 6
EQ WITH KRISTI	SEP 13
TBD - BASED ON CURRENT EVENTS	SEP 20
CLIENT TEAM STRATEGY	SEP 27
COS TEAM	OCT 4
SABRINA VONCH	OCT 11
THE GOODS	OCT 18
TBD - BASED ON CURRENT EVENTS	OCT 25
GUEST HOST - PREFERRED PARTNER	NOV 1
CLIENT TEAM STRATEGY	NOV 8
EQ WITH KRISTI	NOV 15
TBD - BASED ON CURRENT EVENTS	NOV 22
TALENT TEAM	NOV 29
THE GOODS	DEC 6
SIMONE JONES	DEC 13
CLIENT TEAM STRATEGY	DEC 20
TBD - BASED ON CURRENT EVENTS	DEC 27

# Friday

# Feels

FRIDAY'S 1 PM PST

2023

VISION BOARD - CREATION	JAN 6
VISION BOARD - PRESENTATION	JAN 13
YOGA BY CYMBRE	JAN 20
QUIZZICLE - TEAM EDITION	JAN 27
GUEST HOST	FEB 3
DIY VALENTINE'S DAY CARDS	FEB 10
WELLNESS BINGO	FEB 17
HOLLYWOOD SQUARES	FEB 24
Q1 TEAM BUILDING EVENT	MAR 3
YOGA BY CYMBRE	MAR 10
ST PATRICK'S DAY PARTY / EVERYTHING GREEN	MAR 17
GUEST HOST	MAR 24
HEADS UP!	MAR 31
THE PRICE IS ALMOST RIGHT	APRIL 7
GUEST HOST	APRIL 14
EARTH DAY - ROCK PAINTING	APRIL 21
YOGA BY CYMBRE	APRIL 28
CINCO DE MAYO FIESTA / GUAC MAKING	MAY 5
GUEST HOST	MAY 12
VIRTUAL ESCAPE ROOM	MAY 19
Q2 TEAM BUILDING EVENT	MAY 26
MTV CRIBS	JUN 2
EXCITING SPONGE	JUN 9
YOGA BY CYMBRE	JUN 16
GUEST HOST	JUN 23
PATRIOTIC WREATHS	JUN 30

PICTIONARY- MULTI PLAYER DRAWING GAME	JUL 7
GUEST HOST	JUL 14
CATEGORIES THE GAME	JUL 21
Q3 TEAM BUILDING EVENT	JUL 28
YOGA BY CYMBRE	AUG 4
PERSPECTIVE DRAWING	AUG 11
SPIN OF FORTUNE	AUG 18
GUEST HOST	AUG 25
FAMILY FEUD	SEP 1
3RD ANNUAL CW TALENT SHOW	SEP 8
WELLNESS BINGO	SEP 15
ANNUAL IN PERSON TEAM BUILDING EVENT	SEP 22
YOGA BY CYMBRE	SEP 29
GUEST HOST	OCT 6
RECIPE ROUND UP PART 3	OCT 13
VIRTUAL ESCAPE ROOM - CARNIVAL THEME	OCT 20
HALLOWEEN PARTY / PUMPKIN DECORATING	OCT 27
Q4 TEAM BUILDING EVENT	NOV 3
VETERANS DAY OBSERVED	NOV 10
THANKFUL TREE	NOV 17
POST-THANKSGIVING DAY	NOV 24
YOGA BY CYMBRE	DEC 1
2023 CW HOLIDAY PARTY	DEC 8
GUEST HOST	DEC 15
CHRISTMAS EVE OBSERVED	DEC 22
SHOW & TELL - HOLIDAY EDITION	DEC 29

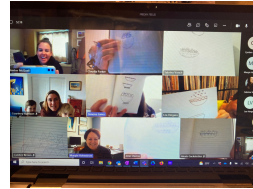
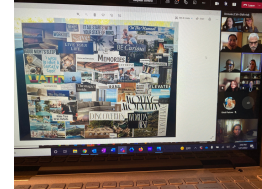
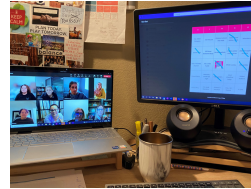
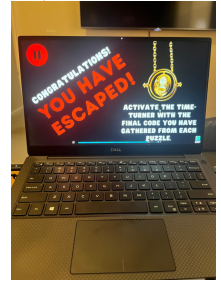
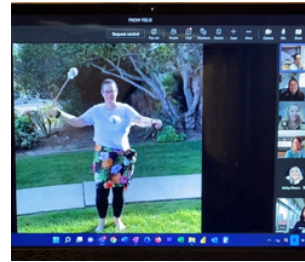
# CULTURE BUILDING *In Action!*

## VIRTUAL FRIDAY FEELS

Icebreaker or Q&As  
Game Shows / Trivia  
Talent Shows

Mind and Body Exercises - Wellness Bingo & Yoga  
Annual Vision Boards

Weekly



Monthly

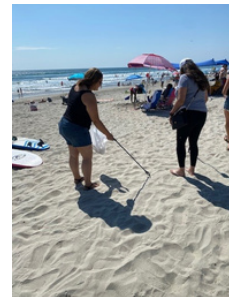
## ALL HANDS ON DECK



## TEAMBUILDING DAYS

Wine Tasting - DIY projects  
Cooking Class  
Game-Based Trophy Competitions  
Community Service

Quarterly



Annual

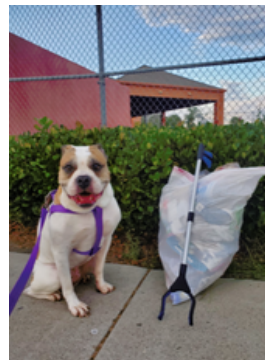
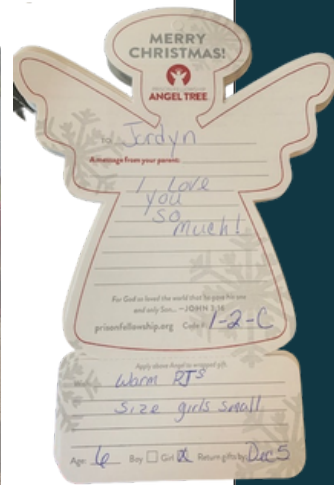
ANNUAL MEDIA DAY & TEAMBUILDING WORKSHOP  
HOLIDAY LUNCHEON





# COMMUNITY, LENDING OUR HELPING HANDS!

- San Diego Food Bank  
February 25th, 2022
- Bernardo Bay Trail Clean Up  
Earth Day April 2022
- Oceanside Pier Beach Cleanup  
July 29th, 2022
- Community Outreach Ministry  
Holiday Donation Drive  
December 2022



Even when our team can't be there, they participate in their local areas.



# 2023 Holiday Calendar

**NEW YEAR'S  
DAY**

Jan 2

\*OBSERVED

**PRESIDENT'S  
DAY**

Feb 20

**MEMORIAL  
DAY**

May 29



**INDEPENDENCE  
DAY**

July 4



**LABOR  
DAY**

Sep 4



**THANKSGIVING  
DAY**

Nov 23

**POST  
THANKSGIVING  
DAY**

Nov 24



**CHRISTMAS  
EVE**

DEC 22

\*OBSERVED

**CHRISTMAS  
DAY**

Dec 25

**YOUR  
BIRTHDAY  
OR  
ANNIVERSARY**

*celebrate*



# COVID-19 EMPLOYEE SAFETY AND SELF-MANAGEMENT PROTOCOL

## Where do we stand?

The well-being and safety of our team and our client partners are of the most importance. We recognize the regulations in place and practice the recommendations, like social distancing, and masks, based on the comfort level of the individual. We want to ensure that we provide an environment where employees feel heard and empowered to make decisions regarding COVID-19 that are best for their own health and safety and the safety of those they come into contact with.

## What does that mean?



### COVID-19 Screening

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We practice self-managed health checks to ensure all employees are healthy enough to work and are protecting the safety of others. Employees are required to self-screen before any in-person meetings and complete the Self Check Questionnaire.



### Social Distancing and Face Masks

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Employees are free to wear a mask or social distance as they feel comfortable. Use your best judgement for what is best for your safety and for the safety of the people you are coming into contact with.



### Proof of Vaccination

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We believe in our employee's right to choose what is best for their body and their right to privacy regarding their health care. We will not be requiring employees to disclose their vaccination status.



### What if I am sick or have been exposed to COVID-19?

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Employees who have symptoms or may have been exposed to COVID-19 should immediately notify Kristi or Human Resources to determine the next steps necessary. We discourage discussions around exposure with the team before speaking with Kristi or Human Resources.



OUR FAVORITE



Tools &  
Resources



Culture Works

purpose ▶ people ▶ process

# SYSTEMS & TOOLS



## Team Notebook

- We're very collaborative and love OneNote
- We prep for client meetings by creating agendas, and keeping notes of our interactions so our team members have the scoop
- We also keep track of resources, CTP's (internal procedures) and best practices that will make our lives easier
- You can also find team success and internal meeting agendas. If it's something worth sharing or important to keep, do it here



## Team Site

- aka Team Drive aka SharePoint
- This is where we keep Word, Excel, PowerPoint, PDFs, and Picture files.
- Everyone on the team has access.

## External Client Site

- Sometimes when working on projects with clients and document sharing is necessary, we set up a shared folder and give them access. This keeps their data secure (i.e. SSNs, DOBs, offer letters, etc).



- **Access:** [www.office.com](http://www.office.com)
- Easily access all your work documents from here: OneDrive, Outlook, PowerPoint, OneNote, Excel, Word, Teams, from any computer



Email isn't fun and can get cluttered, so we use Teams for:

- Intentional communication
- Team & external meetings (just like zoom)
- Explore our existing team communication channels, and create new ones if needed
- **Best Practices:** 1) always reply to messages within the thread to keep the #channel readable; and 2) make sure you set up notifications for the channels you're interested in



In addition to your email:

- **COSTeam@cultureworkshr.com** - Shared inbox set up for the Culture Ops team and used by clients for HR help requests
- **CW All Distribution List** - for "all team" communications.
- Some clients may have dedicated email addresses
- **Calendar** - as the Transparent Partners that we are, we all have access to each other's calendars



- Employee Engagement, Culture Pulse Checks, Value Evolution & NPS Surveys...you name it, we've probably already done it!
- SurveyMonkey is our partner for all these fun surveys we facilitate for clients, or use in-house



Paylocity is our internal HRIS System, we use it for:

- Timekeeping
- Time off requests
- Expense reimbursements
- Employee documents
- Onboarding and offboarding



- Time tracking for internal impact and/or client service metrics



Do we need to explain zoom? lol

- we use zoom for those clients that prefer it to MS Teams
- We also use it for remote Learning & Development sessions, and CW facilitated webinars
- **Best Practice:** we collaborate as a team, so always set up your calls online so you can verify that zoom timeslot is available at that date/ time



- We use Canva to create all sorts of fun and impactful flyers, posters, and communication materials customized to our client's brand
- We also use it for internal materials, including this Culture Playbook
- Trust us, you will feel like you went to design school once you get a chance to play in Canva!



- Our Talent Scouts use this platform to keep track of applicants interested in job postings



- We drive better business decisions by analyzing data visually in POWER BI for insights .



## Microsoft Teams Group Chats



## Microsoft Teams Collaboration Channels

### Informal / Ad-Hoc

- Individual or Group informal chatter
- Cannot add subject/title to messages
- Can upload files, but not saved in SharePoint
- Everyone in the chat group notified of new messages

### PURPOSE

### More Formal/Tracked Conversations

- Group collaboration channels
- Channels can be private or public (CW public)
- Can add Chat Subject/Title to each chat
- Uploaded files are saved within the Channel and in the Channel's SharePoint folder
- Can connect to OneNote Notebooks
- User determines if they want to receive new message notifications

### CW USES

#### CW Team Group Chat

- Strictly informal group chat. (For work updates, communications, or requests, use the COS Internal - General Channel, or an applicable Channel)
- All Culture Works employees have access to this chat group
- Wish happy birthdays, happy anniversaries, etc.

#### Visualize to Materialize Group Chat

- All Culture Works employees have access to this chat group
- The purpose of this chat is to share photos, quotes, or actions we are taking to accomplish our Vision Board desires

#### MS Team Meeting Chats

- Chats that are part of MS Teams scheduled/facilitated meetings show up in the Chat section:
  - Monday team meeting
  - Tuesday team huddles
  - Jam session
  - Friday Feels, and any other meetings scheduled in MS Teams

#### Informal 1:1 Team Member Chats, or 2+ Team Member Chats

- Informal chats between team members (two or more) will show up in the Chat section



Culture Works

purpose ▶ people ▶ process

#### COS Internal - General

- Use for work updates, communications, or requests

#### ✓ Best Practices - Culture, Talent and HR Tips

- Tips on how to do our job better in Culture, Talent and HR



#### Compliance Updates

- Used to provide employment compliance updates to the team



#### Culture Operations - COS Team Requests

- Our Consultants of Service coordinate and track COSTeam Requests here. They coordinate these efforts through this channel to process, collaborate and organize service and support.



#### Education - Articles and Reading Materials

- Articles, Books, and Reading Materials recommended by the team, for the team



#### Crowdsourcing Culture - Sharing News Digitally

- Do you have news to share or have something news worthy? We want to crowdsource our culture by sharing who we are! The clients love CW, but they ultimately love the People that create the magic!
- Use this Channel to share digital pics or short videos that you are giving us permission to share or post on social media.
- Ideas to Share: Culture Works Team Events; Your Birthday pic (after you're back from being off); Your Vacations; Your Clients and their Teams; Your Special Moments & People; Your WINS



#### EQ Techniques, Tips, and Practices

- Use this channel to share EQ techniques that are working for you, EQ articles, books, tips, personal awareness and knowledge

**NOTE:** Additional Project or Group Specific channels exist, or can be created. They can be private channels, or public to anyone at Culture Works.



# NOTES



# NOTES



# Follow Us on Social Media



Let's Get Connected for Our Latest News & Updates



[www.linkedin.com/company/culture-works-hr](http://www.linkedin.com/company/culture-works-hr)



[www.instagram.com/cultureworkshr](http://www.instagram.com/cultureworkshr)



[www.facebook.com/CultureWorksHR](http://www.facebook.com/CultureWorksHR)



<https://www.youtube.com/channel/CultureWorks>



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