

Saltmarsh

Saltmarsh, Cleaveland & Gund

CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS

The Saltmarsh Way

Integrity and Honesty, Respect, Creativity, and Quality Service. For generations these words have defined our unique firm. But what do they really look like in practice? The 33 “Fundamentals” that make up the Saltmarsh Way provide the answer. They outline how we work with our clients, our strategic partners, and each other. These Fundamentals describe who we are, and they’re what drive our team’s extraordinary success.

1. **DO THE RIGHT THING, ALWAYS.** Integrity is our foundation. Demonstrate an unwavering commitment to doing the right thing in every action you take and in every decision you make, *especially when no one’s looking*. Always tell the truth, no matter the consequences. If you make a mistake, own up to it, apologize, and make it right.
2. **MAKE QUALITY PERSONAL.** Demonstrate a passion for excellence and take pride in the quality of everything you touch and everything you do. Generations of Saltmarsh clients have come to expect this of us. Don’t accept mediocrity. Good is *not* good enough. Always ask yourself, “Is this my best work?”
3. **HELP THE TEAM SUCCEED.** It’s not about you. Don’t let your ego or personal agenda get in the way of doing what’s best for the team. Be there for each other and be willing to pitch in, step into another role, or help a coworker when that’s what’s required. Help each other to succeed.
4. **BE PRESENT.** Have a passion for what we do and stay fully engaged. Come well-prepared for each meeting and be present for every interaction. Make the most of each day by approaching every task with energy, focus, purpose, and enthusiasm.
5. **DO WHAT’S BEST FOR THE CLIENT.** In all situations, do what’s best for the client, even if it’s to our own short-term detriment. Show courage in speaking the truth and putting their needs ahead of our own. There’s no greater way to build a reputation than to steadfastly do what’s right for others. Every day.
6. **PAY ATTENTION TO THE DETAILS.** Missing just one detail can have an enormous impact on a job. Be a fanatic about accuracy and precision. The goal is to get things *right*, not simply to get them done. Double-check your work. Get the details right the first time.
7. **PRACTICE EMPATHY WITH OTHERS.** Walk in the shoes of those with whom you interact – both our clients and our own people. Know their challenges and frustrations, and see things from the other person’s perspective. Understand how

events might impact them. The better you know them, the more effectively you can anticipate and meet their needs.

8. **BE INTENSELY CURIOUS.** Be curious, ask thoughtful questions, and listen intently to the answers. Challenge and question what you don't understand, not to put up obstacles but to help find the best solutions. Don't accept anything at "face value" if it doesn't make sense to you. Dig deeper to go beyond the expected. Ask the extra question. It's okay to not "know" the answer at first.
9. **HONOR COMMITMENTS.** Do what you say you're going to do, when you say you're going to do it. This includes being on time for all phone calls, appointments, and meetings. If a commitment can't be fulfilled, notify others early and agree on a new deliverable to be honored.
10. **DELIVER LEGENDARY SERVICE.** It's all about the experience. Do the little things, as well as the big things, that surprise people. Make every interaction stand out for its helpfulness. Create the "WOW" factor that turns clients into raving fans.
11. **TAKE ACTION.** Work with a sense of urgency to get things done. Don't get so caught up chasing the perfect plan or asking for input from everyone that you never get started. Instead, gather the relevant facts and evaluate your options thoroughly, then get moving. Act decisively. If new information becomes available, don't be afraid to make a new decision and change course when it's appropriate.
12. **PRACTICE BLAMELESS PROBLEM-SOLVING.** Demonstrate a relentless solution focus, rather than pointing fingers or dwelling on problems. Identify lessons learned and use those lessons to improve ourselves and our processes so we don't make the same mistake twice. Get smarter with every mistake. Learn from every experience.
13. **SPEAK OPENLY AND HONESTLY.** Speak directly in a way that helps to make progress. Say what you mean, and be willing to ask questions, share ideas, or raise issues that may cause conflict when it's necessary for team success. Give constructive feedback and be courageous enough to say what needs to be said. Address issues directly with those who are involved or affected.
14. **LISTEN TO UNDERSTAND.** Listening is more than simply "not speaking." Give others your undivided attention. Be present and engaged. Minimize the distractions and let go of the need to agree or disagree. Suspend your judgment and be curious to know more, rather than jumping to conclusions.
15. **CELEBRATE ACHIEVEMENT.** Take the time to celebrate our victories. No one is too busy to recognize and enjoy success. Celebrating achievement reinforces the fact that we're in business to deliver results. When one of us wins, we all win, so "ring the bell" for one and all!
16. **BE A FANATIC ABOUT RESPONSE TIME.** Respond to questions and concerns quickly, whether it's in person, on the phone, or by email. This includes simply

acknowledging that you got the question and you're "on it," as well as keeping those involved continuously updated on the status of outstanding issues.

17. **TREAT EACH OTHER LIKE FAMILY.** Our relationships go deeper than simply being teammates at work. We genuinely care for and about each other. Whether it's a kind word during a tough stretch, a friendly smile each morning, or a helping hand in stressful times, show your compassion.
18. **TAKE OWNERSHIP.** Take personal responsibility for making things happen. Be resourceful and show initiative. It's never someone else's job or someone else's fault. If you see it, own it, and find a way to get it done. Don't make excuses.
19. **BE RELENTLESS ABOUT IMPROVEMENT.** Regularly evaluate the way you work to find ways to improve. Don't be satisfied with the status quo. "Because we've always done it that way" is not a reason. Guard against complacency. Find ways to get things done better, faster, and more efficiently.
20. **GET CLEAR ON EXPECTATIONS.** Create clarity and avoid misunderstandings by discussing expectations upfront. Set expectations for others and ask when you're not clear on what they expect of you. End all meetings with clarity about action items, responsibilities, and due dates.
21. **LEAN IN TO GROWTH.** We're in business to deliver value for our clients while making a profit. We all play a role in building revenue that exceeds our expenses. Look for ways to increase our revenue growth, develop strong client relationships, and control our expenses.
22. **SHOW MEANINGFUL APPRECIATION.** Recognize people doing things right, rather than only pointing out when they do things wrong. Regularly extend *meaningful* acknowledgment and appreciation — in all directions throughout our organization. It matters.
23. **DELIVER RESULTS.** While effort is important, people expect *results* and we celebrate *achievement*. Follow-up on everything and take responsibility to ensure that tasks get completed. Set high goals, use measurements to track your progress, and hold yourself accountable for achieving those results.
24. **BE POSITIVE.** You have the power to choose your attitude. Choose to be joyful, optimistic, and enthusiastic. Don't gripe about our clients or our people. Instead, see the good in others. Your attitude is contagious, so spread optimism and a positive attitude.
25. **PRACTICE GOOD "BUSINESS HYGIENE."** Rigorously follow our operating procedures to ensure consistency, high performance, and good "business hygiene." Post time immediately and keep current with billing. These procedures keep our firm profitable and in business.
26. **EMPOWER OTHERS.** Take responsibility, both formally and informally, to coach, guide, teach, and mentor others. Give those around you the opportunity and tools to succeed. Encourage your coworkers and let them know they are

capable, regardless of age or experience. Empowering others strengthens our team.

27. **EMBRACE CHANGE.** What got us here is not the same as what will get us to the next level. Get outside your comfort zone, rather than simply hanging on to old ways of doing things. Be excited by the possibilities that change brings. Be flexible.
28. **BE A LIFELONG LEARNER.** Seek out and take advantage of every opportunity to gain more knowledge, to increase your skills, and to become a greater expert. Be resourceful about learning and sharing best practices.
29. **INVEST IN RELATIONSHIPS.** Get to know your clients and coworkers on a more personal level. Connect in live conversations more and email less. Build partnerships by treating others as people, not transactions. Understand what makes them tick and what's important to them. Strong relationships enable us to more successfully work through difficult issues and challenging times.
30. **LOOK AHEAD AND ANTICIPATE.** Solve problems *before* they happen by trying to anticipate future issues, planning for contingencies, and addressing them in advance. Work with appropriate lead times. Preventing problems is always better (and more efficient) than fixing them.
31. **COLLABORATE.** Share information and work together. Collaborate internally and with our clients and partners to find better solutions. Collaboration generates better ideas than working alone. Be inclusive.
32. **TREASURE, PROTECT, AND PROMOTE OUR REPUTATION.** We're all responsible for, and benefit from, our firm's image and reputation. You never know when opportunity will present itself or who might be watching, so consider how your actions affect our collective reputation. Always be a proud ambassador of the firm.
33. **KEEP THINGS FUN.** While our passion for excellence is real, remember that the world has bigger problems than the daily challenges that make up our work. Stuff happens. Keep perspective. Don't take things personally or take yourself too seriously. Laugh every day.

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