

Breakdowns & Band-Aids

As we grow as a firm and navigate change, we wanted to create a way to help us normalize internal task and process conflict. This form is meant to become a new place for these things to land conveniently and quickly throughout your day as issues come up. This will also help us drive the Ops Manual Collaboration, hopefully identifying areas where we need to up-level our processes, workflows, training, and communication.

Examples of Breakdowns:

- Frustration with technology
- Lack of clarity around a firm initiative
- Miscommunication about who is supposed to be doing what
- Thinking that something would be better handled in a different way than it was
- A ball that was dropped
- A process you're involved in that feels clunky

Guidelines:

- This is a no-judgement zone
- Be curious about why the breakdown has occurred
- Focus on the process, not the person
- Step into a solution-oriented mindset
- Nothing is too small (maybe you're wondering why the conference room chairs are never pushed in)

Next Steps:

- Your Breakdown Brief submissions will land in a safe space
- Tiffany and Jarrod will lead the prioritization and resolve of each Breakdown
- Weekly check-ins during All Company meetings on Mondays



* Required

1. Name *

2. Which core area of business do you believe this breakdown falls under? (Select One) *

- Business Strategy
- Culture & People
- Operations, Finance, & HR
- Client Service & Experience
- Investments & Financial Planning
- Compliance, Security, & Legal
- Marketing & Business Development
- Technology

3. What's the breakdown?

4. Who is involved? (team members, clients, COI, vendor, etc.) *feel free to be as general or specific as you're comfortable with

5. What technology platform(s) are involved?

6. (Optional) Please share any ideas, feedback, or resources that you believe might resolve this breakdown.

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