

Our Five Principles

Operating Principles for Bersin & Associates



Bersin & Associates lives by its five principles. They are the "rules" of the business, developed through our own personal experience and success. They should be considered the "best practices" and guidelines for everything we do. You as an employee or stakeholder should consider these principles as your "operating guidelines" -- they will be used to evaluate individual performance, help us to make decisions, and form the basis for the development of our people.

This document lists the principles and gives examples of activities and behaviors which can help you understand how to apply these principles.

I. Unparalleled *Client Service*

Our first principle is client service. While we develop research and deliver consulting, ultimately we are in the service business. We must always strive to exceed client expectations in every single interaction. Service excellence will drive clients back to us. Remember that our clients are "people people" – and they greatly appreciate and remember each and every interaction with our company.

- Each and every client (and prospect) should feel like they are our #1 customer
- Call everyone back that day or the next day (we have a 24-hour response policy on call calls and emails)
- Respond to all emails politely and quickly
- Use a professional manner and approach
- Listen carefully before responding ("listening" is one of our core competencies)
- Clients are almost always "right"
- We are here to help our clients solve their business problems, not sell them things
- Our clients goals are our goals
- Every client and prospect is important – small or large
- Always err on the side of politeness and respect
- Be discreet, do not spread rumors or talk about other clients
- Offer clients many ways of giving us feedback and take all feedback positively and seriously
- Unhappy or upset clients are a great opportunity to create delight and satisfaction – take these situations very seriously
- Try to over-exceed client expectations in every interaction - go the extra mile to build a long term relationship
- Make clients thrilled to be working with us
- Our reputation is your reputation; your reputation is our reputation – strive to become "loved" by your clients
- Everyone deserves respect regardless of their level in the organization
- Listen carefully to all vendors regardless of size – we have a responsibility to work with everyone in some way, and often small vendors become big vendors
- Case study participants should be treated as if they are clients whether they buy anything or not
- Vendors are important to us and should always be treated with respect.

2. Error-free *Quality* in everything we do

Our core product is information – a very intangible thing. People have learned to trust this information and advice, so it must be predictable, reliable, and correct.

Quality in form, content, and delivery drives our value and client loyalty. Excellence in quality is core to our brand.

- We are in the intellectual property business, we should not tolerate errors
- Emails should be simple, clear and error free
- Billing and collections should be correct
- Check everything twice before you send it
- No spelling or grammatical errors – they reflect on you and the company
- Colors and fonts and templates really matter, do not go around them
- Use our brand, tagline, logos, company description, and template correctly, get the latest version if you don't have it
- Fix web site errors immediately
- Proposals should be simple, clear, readable, and accurate, read them twice
- Don't be afraid to take an extra hour or day if you have to and make sure it's 100% right
- Get things reviewed by others to make sure you didn't miss something
- Test all surveys at least 2 times before sending them out
- Do not send any emails with broken or incorrect links
- All emails should be sent only to the appropriate lists
- Do not spam any of our clients ever
- Check, validate, and test any vendor claims
- Do not necessarily believe any vendor statements until they are proven
- Do not disclose or even hint about confidential information
- Feel free to point out errors to others immediately when you see them
- When you make a mistake, just fix it and try not to do it again (we're all human.)

3. *Integrity*: in Research, Client, and Vendor Relationships

We are key trusted advisors to our clients and prospects and must constantly strive to do what is best for the client's business. We treat suppliers with equality and integrity and we must use integrity in the development of our products and services.

- Our research are not reports they are solutions
- We do not sell research and consulting we sell solutions to business and training problems (maintain integrity to the client)
- Every deliverable should help a client solve a problem
- Do not write information which is not actionable - our research should focus on practical solutions which others can use

- When you voice an opinion make it clear that it is an opinion, and do not voice opinions without hard evidence to back it up
- Share your opinions with others to make sure they are consistent with company statements
- Listen to precisely the business problem your clients have and keep asking about what business problem they are trying to solve, continuously ask yourself ‘what problem is this client trying to solve?’
- Remember that all client problems have three parts: the business problem, the organizational and political problem, and the personal challenge this presents to the actual client as an individual
- Seek out repeatable solutions and best practices which others can use - many best practices are very simple and practical – do not miss them.
- Explore case studies for “what works” – not “what should work.”
- Do not be afraid to identify “what doesn’t work” and report these findings, academic approaches are interesting but not actionable
- We research business solutions, processes, and how technology solves problems – and how others can learn; be careful when you find a ‘best practice’ which no one else could possibly replicate
- Measure only enough to be actionable, not everything; think about your hypotheses before you launch a study, develop a survey, or start asking questions
- Be inquisitive and interested in why a client did what they did
- Analyze data as much as possible before drawing conclusions, and do not jump to the conclusion that two correlated factors are causally related – think about other factors
- Test all survey results against actual qualitative interviews; when you see survey results ask yourself – what does this mean? What is actionable about this data?
- When engaging with clients listen carefully and slow down; do not jump to conclusions.
- Try to deliver exactly what the client needs and do not be afraid to tell them if you think they are going down the wrong path
- Do not give “opinions” about vendors – only facts you can stand behind – your casual statements may cause major decisions to be made
- We do not “recommend” vendors but rather give clients information and processes to help them make decisions -- let them make the final selection
- Always respect vendor’s confidential plans and strategies like they are ours
- Propose the “right” solution and if you’re not sure what that is ask someone
- If you are unsure of something or do not have enough information do not be afraid to say so.

4. Client Value: Deliver the Highest Value at All Times

Our products and services should always deliver 10-100X return on investment. We do not “do research” – we solve client problems – and in every interaction we should price, propose, and deliver solutions which we believe will bring 10-100X return on investment.

- Value is very important; price our services to deliver a minimum of 10-100x the return on investment;
- We should always be the best value for the money, not the cheapest (e.g. our value is much higher than others)
- We are a premium brand – people will appreciate the quality, service, and integrity we bring to their problems
- Work within your client’s budgets and propose the right solutions

- Be patient with clients who do not see the value yet – they will over time. It's ok to start a relationship small and grow.
- Under-promise and over-deliver, think through how we will deliver on client needs before making claims or proposals
- Do not chase deals which are not profitable or in our core areas of focus
- We sell intellectual property and best practices and strategy services, not “arms and legs” to do work, others are better suited for implementation services
- We are unique and different from our competition; we have deep knowledge and experience and we are vendor-neutral: this is of high value
- Clients of all sizes should be able to afford our research and services, we must package our solutions for mid-sized as well as large organizations
- Do not be afraid to create creative pricing as long as it is profitable and consistent
- Sell and propose our core services and be careful of straying from our core.

5. Teamwork: We complement and support each other

We are a special team of individuals with passion, drive, and focus. We support each other to drive client results.

- We are “egoless” and communicate openly and honestly.
- We all take “stewardship” for the organization in every decision – deciding what is best for Bersin & Associates, not only my own job or function
- When we see an opportunity for another person to improve, we tell them. When we need help, we ask for it.
- We respect each other and listen.
- We are not afraid of constructive confrontation and debate. It makes us a better organization and helps us develop better products and services.
- We celebrate the successes of others.
- We develop our people and promote from within.
- We make sure that all individuals are in the right jobs, to leverage their skills and abilities and career aspirations.
- We give honest feedback to individuals who are not performing to our standards. And we must be open to feedback and consider it a gift.
- We give people an opportunity to improve.
- We provide time and opportunities for training and learning.
- We understand that others may be busy and we respect their time.
- We show up to conference calls and meetings on time.
- We discuss and debate decisions but one decisions are made we execute.
- We honestly assess the wisdom of our decisions and are not afraid to admit if we make mistakes.

Five Principles as the Foundation of our Organization

These five principles make up the foundation of the company's competency model. You should familiarize yourself with these competencies and discuss them with your manager on a regular basis.

Our Talent Profile

Bersin & Associates Competency Framework

