

# Blue Margin Values



●●●● BLUE  
●●●● MARGIN  
The Dashboard Effect

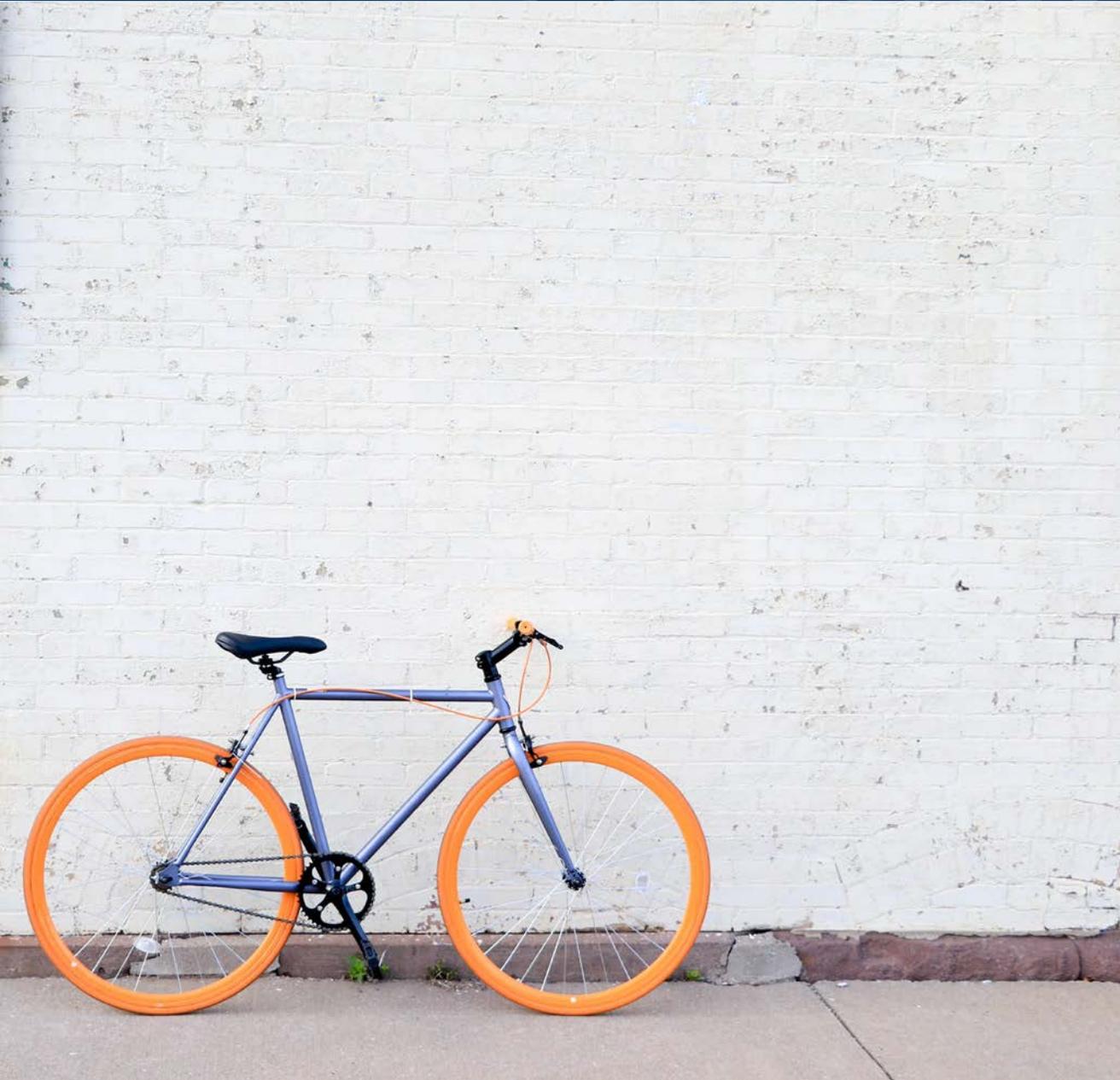


Seriously, who wouldn't love this crew?



**Values and Culture** are Blue Margin's most important assets.

They're the foundation of our success and the reason **we love this company.**



# Our **Core Values**

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Be Transparent

Be Positive

Be Efficient

Be Generous

Be Learning

# Be Transparent

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- We are honest and up-front with our colleagues and clients (always with kindness and respect).
- We readily confess our mistakes; we don't fear them.
- We graciously receive feedback from our colleagues.

**Honesty is simply the right thing to do.**

**When truthfulness is non-negotiable, decisions becomes much simpler.**

**Transparency builds the respect and trust needed to make us a healthy team.**



Early in her employment, Sarah had the courage to give Brick (her new boss) direct feedback. She told him he didn't clearly communicate his expectations when away from the office (that took guts; she gave him a "2" 😊). Sarah was right. Her feedback helped Brick be more effective as a manager, and made life better for the engineers.

# Be Positive

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- We choose the positive point-of-view.
- We choose to associate with other positive-minded people.
- We aren't cynical, and we're not negative just for the sake of humor.

**Our business is what we make of it; choosing optimism helps us thrive, even in adversity.**

**Looking for the good in situations makes life and work more enjoyable.**

**"Faking it" for the sake of being positive isn't healthy. Be positive, but be real.**



Brick and Jon have a good friend, Tracy, who was born quadriplegic. He is without question the most life-affirming, positive person they know. He received his graduate degree and has been a probation officer for the past 25 years, and he's only said one negative thing about another person to their knowledge. When asked why [anonymous] hadn't been around, he replied, "He complains too much." 😊

# Be Efficient

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- We produce high-quality output, but we don't waste time on perfectionism.
- We "cut through" complexity and get to results as directly as possible.
- We systemize and automate wherever it increases our efficiency.

Perfection is not the goal, making steady progress is; don't let perfectionism get in the way.

Working-hard  $\neq$  Value. The more hours, the lower the ROI.

Productivity is energizing. "Slogging through" is not.



Our project managers used to prep for and conduct weekly client status meetings, mostly shooting from the hip. Kyle and Matt systemized the process with a simple status update form. It delivers better, more-consistent results with less effort.

# Be Generous

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- We believe generosity produces better business outcomes and wellbeing.
- We're generous not just for our benefit, but for our customers, and for everyone who interacts with Blue Margin.
- We prioritize volunteering to help those in need.

**Generosity is a universally good principle.**

**Generosity, like honesty, reduces many difficult choices down to one.**

**When in doubt, give more.**



At a BMCW volunteering event, a homeless woman dropped her handful of belongings to give Josh a bear-hug simply because he offered her a box to carry her things in. Extending ourselves, even in small things, can have a big impact on others.

# Be A Learner

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- Our culture is one of learning.
- We're disciplined about learning because we recognize it takes work.
- We involve ourselves with people and activities that grow our understanding and make us sharper.

**Learning is synonymous with growing— making it a habit keeps us alive (literally) and inspired.  
Our industry is moving fast - if we stop experimenting and creating, we'll become obsolete.  
Learning increases a person's security and marketability.**



When we started this company (in a basement), Google was the leader in Cloud-based productivity tools. Then Office 365 took center stage. Within 2 years, 365 became a commodity. With each change, we pivoted, ultimately landing on data. But we haven't actually "landed." In our industry, we have to be intentional about learning the latest and greatest, and be willing to redefine ourselves to meet the market.