

DORN'S CORNER

Dorn Swerdlin



It's time to present my declaration for 2017. I declare 2017 as The Year of Enhanced Corporate Culture.

So why worry about culture?

Many experts say that the culture in an organization is becoming the primary competitive advantage in the organization. As technology advances accelerate, the playing field in the marketplace becomes more level. For example, in the retirement administration business, the first companies to provide for 401(k) daily valued recordkeeping services were large corporations who could afford the expensive technology. Smaller companies, like Swerdlin & Company, could not even play in the daily recordkeeping game. As technology advanced and became less expensive, the competitive advantage held by the larger firms dissipated. As this happens, corporate culture becomes the primary force factor in the competitive advantage.

The first step in enhancing the company's culture is to develop a set of values for the company. This gives all employees a guide for their behavior. I'd like to use our firm as an example. Our value statement is:

BALANCE

Our employees are our greatest asset, and we recognize that they have a life outside of work. We provide a positive and nurturing work environment and advocate a healthy work/life balance.

INTEGRITY

We hold ourselves to the highest professional and ethical standards. We maintain independence and work to always do the right thing.

RELATIONSHIPS

We build strong, long-lasting relationships based on trust, accountability, and fairness. We truly care about our employees and our clients.

DEVELOPMENT

We focus on developing our people professionally and personally. We provide professional training and mentoring, and encourage our people to pursue personal development.

In order to enhance your culture, the trick is to have all employees understand and “live” by these values. The company leaders must set up policies and procedures to reflect the values. Then they must create accountability systems and metrics to monitor behaviors to assure consistency with the values.

We Soar like a BIRD!

I'd like to share some of what we've done at Swerdlin & Company to enhance our culture based on our values, **Soar like a BIRD**. For many years I have assumed the job of focusing on our culture. As you look at our values, you might notice that our major focus is keeping our employees happy, well trained, and able to enjoy a balanced lifestyle.

In order to encourage a balanced lifestyle, we encourage our people to take on personal development unrelated to work. We reimburse our employees for approved activities such as the following:

- Weight loss programs,
- Meditation classes,
- Photography classes, and
- Many others.

We also host company activities throughout the year to help make our employees enjoy their work-life, such as:

- Monthly “STARS” meetings for the entire company. We serve a catered lunch, share news and company updates, and award “stars” to other employees to acknowledge exceptional behaviors that enhance our company culture. For example, if Mr. A stays late to help Ms. B on a client project, Ms. B could give a star to Mr. A to thank him.
- Halloween and Christmas parties,
- Deadline parties, (to celebrate finishing a busy season),
- Lunches to generate money for charities, and
- Many others.



For more than 20 years our Christmas party has included an Elvis Impersonator who performs for the company. That impersonator is me! I have a jump suit, a wig, and lots of jewelry. My performance is backed up by 4 talented women (employees), known as The Swerdlinaires, named after the Jordanaires, who backed up the “other” Elvis. It's a lot of fun!

Another distinction in our culture is the opportunity to learn how to meditate. I am a certified instructor in the Primordial Sound Meditation technique created by the Chopra Center for Wellbeing. I conduct classes to teach those employees interested in learning this technique. We hold a group meditation for those interested every Monday, Wednesday and Friday at 9:00 am in our office. I believe when employees meditate they are more productive, happier, calmer, and better equipped to handle life's stresses. In fact, the main benefit of this meditation is to help release stress.

Our offices provide an attractive and comfortable environment. In fact, visitors have often commented on the positive feelings they get from our people when they walk through our offices.

I think we have a great culture, even if I have to say so myself. It's not perfect, and this year we are focusing on improving the accountability structures to assure our behaviors remain consistent with our values.

I believe our caring about our people, our clients, and those relationships we have cultivated in our industry and throughout our community are what makes our culture so special.

In the following months I will continue our conversation about the importance of corporate culture. 🐦