



CLIENT TESTIMONIAL

I first learned about Joe Ratterman through my CEO, Carl Mayer. Over the years working with Carl, he would often reference conversations with Joe about business and leadership. So when Carl introduced the opportunity to work with Joe directly I was extremely humbled and excited.

In our first conversation, Joe went through his approach very methodically to help me understand what would and wouldn't be the aims of our work. The preparation and care that went into designing this program were apparent, synthesizing a career's worth of valuable experiences into a form that could be shared to help me learn and grow.

One thing that was obvious from the beginning is that Joe's style and intention is not to help you 'be like him', but rather to discover or refine your identity and style as a leader. I learned as much about myself in the year working with Joe as I did about his experiences and how those can help me. And not just me as a businessperson, but as a father, husband, mentor, friend and all the other roles I hold in my life. This level of guided reflection and synthesis was extremely valuable to deepening my understanding of my identity and core values, which in turn have made me more effective as a leader in my organization. The "Hats I Wear", "Core Values Discovery" and "Personal Mission Statements" were impactful exercises that I will continue to refer to throughout my life.

Most of my work week-to-week with Joe centered around team dynamics and leadership methods to produce positive outcomes on a more consistent basis. Key topics/conversations that had a major impact on how our company is run today:

- 1. Culture Index – Joe's simple but pragmatic approach to utilizing this tool dramatically shifted the way our company and our managers look at candidates, teammates, and ourselves. Joe was able to put the tool into practical terms to make it much more approachable and useful for our management team.*
- 2. Recruiting/hiring process – One of the first topics we worked on, Joe's influence has led to an overhaul of our recruiting process. Not so much in the mechanics of who interviews and how, but on the assessment and being persistent about holding the highest bar we can when deciding who to bring onto our team. It has shaped how we gather feedback from interviewers, and what we look for in that debrief session to gauge excitement of the team, surface reservations and be proactive about resolving any lingering concerns. As Joe cautioned me, we have said 'no' to good candidates as a result, but have continued to bring on great ones and the results for our company have been outstanding.*

The year I spent working with Joe was a period of significant growth for our company. Joe often encouraged me dealing with challenges I was facing for the first time. His independent, experienced perspective was invaluable in helping me stay centered and focused on fundamentals to keep moving forward amid uncertainty. One of the most important take-aways came when discussing how to deal with different sub-cultures with the organization, as we managed lots of new staff coming onboard rapidly and the inevitable friction that arises between departments. I will never forget Joe's advice, instead of 'correcting' unproductive behavior, to relentlessly live in my vision of what our company is becoming and embody that spirit in all my interactions with the team.

This focus on the future and forward momentum, while acknowledging the challenges of the present, has become a central component to how I and my senior leaders now carry ourselves and lead our teams. It has tied us back to our mission (which we refined), providing a unifying theme to mobilize around, overcome obstacles and seek common ground when conflict arises. This lesson came from one of our last conversations, and it will have a lasting impact on me and our entire company.