



PETRA PEOPLE

**'ROCKS' CREATE SOLID FOUNDATION FOR
PROFESSIONALS AND PERSONAL GROWTH**



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LIFE LESSONS for BUSINESS OWNERS

At DSI, we are constantly focused on building and maintaining a strong and supportive company culture. It is one way – and a very important one – that we live our core purpose of “eDiscovery about people.”

Central to our efforts to build a strong corporate culture are the “Rockefeller Habits” – a collection of proven organization-building methods used by John D. Rockefeller and outlined by Verne Harnish in his book, *Mastering the Rockefeller Habits*.

The Rockefeller Habits – or, the Rocks, as we know them – are the foundations of a company's priorities, data and rhythm. Here is what that means for us:

- **Priorities:** Each quarter, we have a planning session with our business coach, Andy Bailey of Petra Coach, who has been integral in our successful implementation of Rocks. At these meetings, we set individual and company quarterly priorities –the top three to five things we should accomplish in the next three months to move our business forward. Company priorities support the one-year, five-year and 15-year goals we have set, which we revisit annually during our fourth quarter planning meeting. Most individual priorities are tied to company goals so that team members can see how they help our company succeed as they further their own professional development.
- **Data:** Each employee has a one-on-one meeting with his or her supervisor every two weeks. During these meetings, employees discuss personal highs and lows, professional highs and lows, metrics about their progress towards goals and customer or co-worker feedback. The meeting ends with the employee setting the top tasks to be completed before the next meeting. These meetings help break down large quarterly or annual goals into smaller, measurable projects, making them seem more attainable. They also guarantee robust two-way communication between management and staff to ensure that each person's voice is heard and helping our company run smoothly.

- **Rhythm:** We hold a “huddle” – a short standing-only meeting – four times a week. Our Monday all-hands-on-deck (AHOD) huddle includes all of our employees. Tuesday through Thursday, each department has rhythm huddles with their team. These efficient meetings quickly cover things we should be aware of, if someone needs help, where each person stands on their priorities and tasks, and what their schedules are like that day.



This Rocks system may sound simple, maybe even simplistic, but the results have been significant. For example, the biweekly one-on-one meetings have helped improve employee performance, provided one-on-one accountability and enhanced company culture. Employees have a safe space to discuss anything they wish with their superiors, such as an issue with a co-worker or client, something in their personal life that is distracting them at work or the solid work they have completed for clients. These meetings also give team members a chance really get to know their supervisor on a personal level, which fosters deep bonds of trust throughout the company.

We track our Rocks system through an online platform called Align. As an eDiscovery company, we love technology, and this system allows us to easily monitor how we're doing. Each day's huddle information is input so it's accessible as needed throughout DSi. We are able to see all company and individual priorities and statuses. It includes our core purpose, core values, growth goals and more.

Recently, we had a quarterly theme around using Align and attending huddle. Employees gained points for logging top priorities, checking off completed tasks in Align and making progress toward meeting goals. Every Friday, the team with the highest number of points sprayed silly string on the team with the lowest rankings. This was a fun way to encourage everyone to make Rocks and Align part of their everyday mentality and to reward those doing a good job.

Ultimately, this system is about making our company the best it can possibly be – a place where our employees feel valued, our business stays innovative and our clients receive the best service possible.

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THE PETRA EXPERIENCE

The Petra Experience is like a Mental Marathon of focused effort to create a specific set of priorities and a planned process to achieve them... as a team.

Looking to change your business life - forever?

The daily grind of growing a business is tough... it doesn't have to be that way. We work from our own business experiences while focusing on your business – as coach and an accountability partner. We implement the Petra Process in a way that ensures it “sticks” then we stay engaged to keep you on your path to success and less frustration. We don't want this to be just another thing you start – then it gets ignored and finally dies... let's stop that cycle in your business. The Petra Program 'clarifies' what is most important to be done – by whom, by when – **AND** creates an accountability structure to ensure **IT GETS DONE.**

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