



Designing Culture

MPB | Leadership Accelerated

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Agenda

- Assessing the Effectiveness of Your Culture
- Defining a Successful Culture for Your Firm
- What Your People Need and What Your Clients Expect
- Developing the Foundation for a Thriving Culture – Values Based Behaviors

Exercise!

In Your Mind, What Does
a Thriving Culture Look
Like?

Merlin Methodology
1 yr, 3 yrs, 5 yrs



Important Philosophical Mindsets

Intention does not equal impact

The Assume Nothing Principle

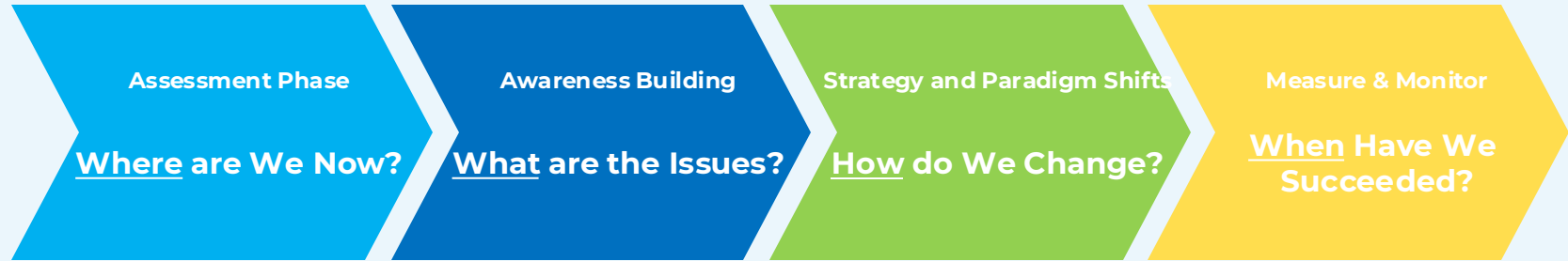
Little intentional actions move change forward as long as you measure them

This is never one size fits all

Deploy, measure, evolve, deploy, measure...

ACCOUNTABILITY at the granular level!

THE CULTURE CONTINUUM



- Business case
- HR Data
- 360 Feedback
- Culture & DEI Surveys
- People metrics: retention, hiring, rankings, promotions, etc.

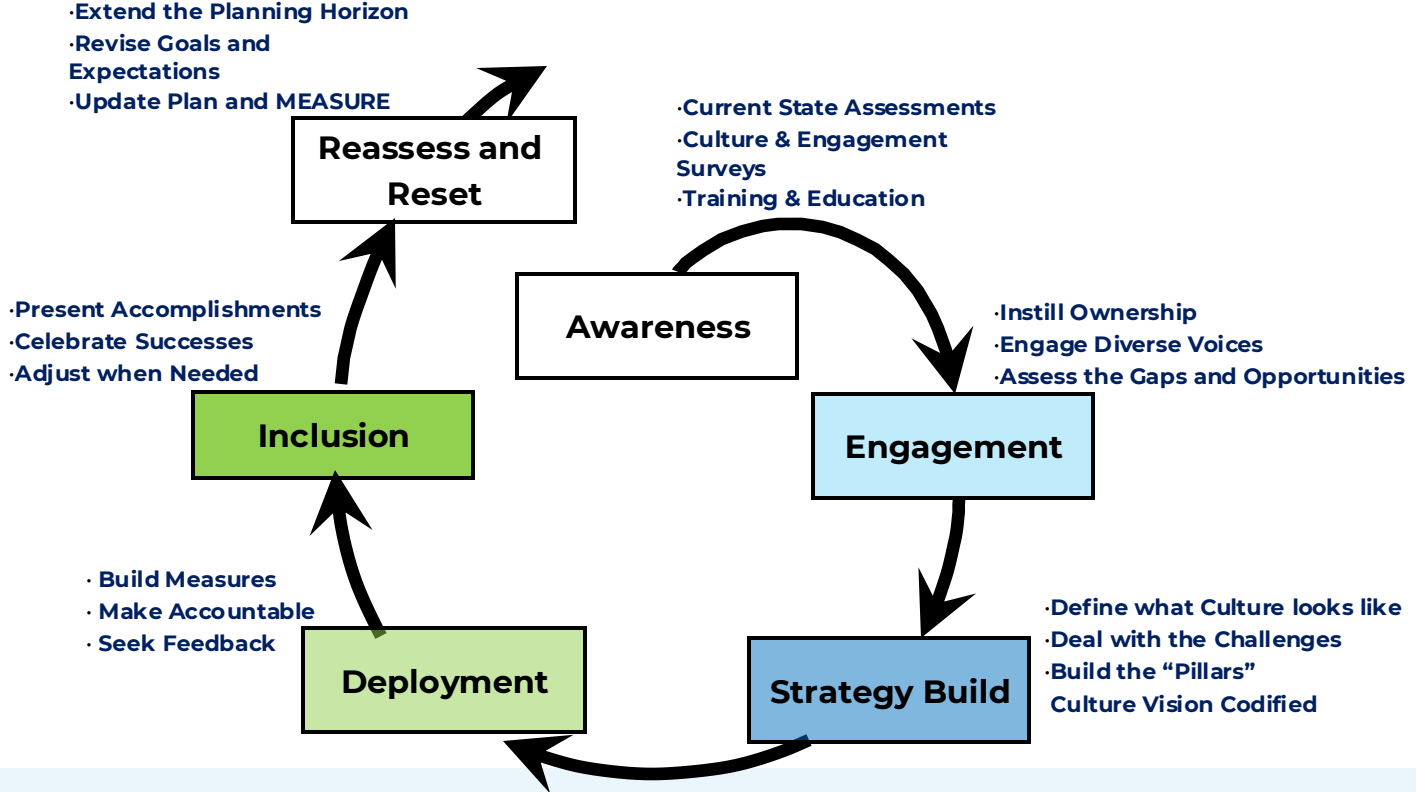
- Listening Sessions
- Unconscious Bias Sessions/Cultural IQ
- Emotional Intelligence
- Mental Health
- Values Building
- Leader Conversations
- Strategy

- Talent Acquisition
- Pay/Opportunities
- KPIs
- Education/Coaching
- Leader Development
- Onboarding
- Promotion
- Retention
- Policy Changes

- Pipeline Management
- Career Trajectory Analysis
- Power Mapping
- Review
- Leader Expectations
- What do Metrics tell us?
- Accountability

Culture Strategy Paradigm

Engage, Embody, Empower



Cultural Assessments:

- Demographic Significance
- Measures PERCEPTIONS and PERSONAL EXPERIENCES/OBSERVATIONS
- At One Point in Time
- Straightforward Execution
- Gives GREAT Insights in to FOCUS
- In conjunction with data, give you a roadmap for strategy, education, and communication
- Surveys, focus groups, interviews, forums
- You cannot assess your own culture effectively

Survey Data

What did you see culturally as a whole?

Environment

Performance

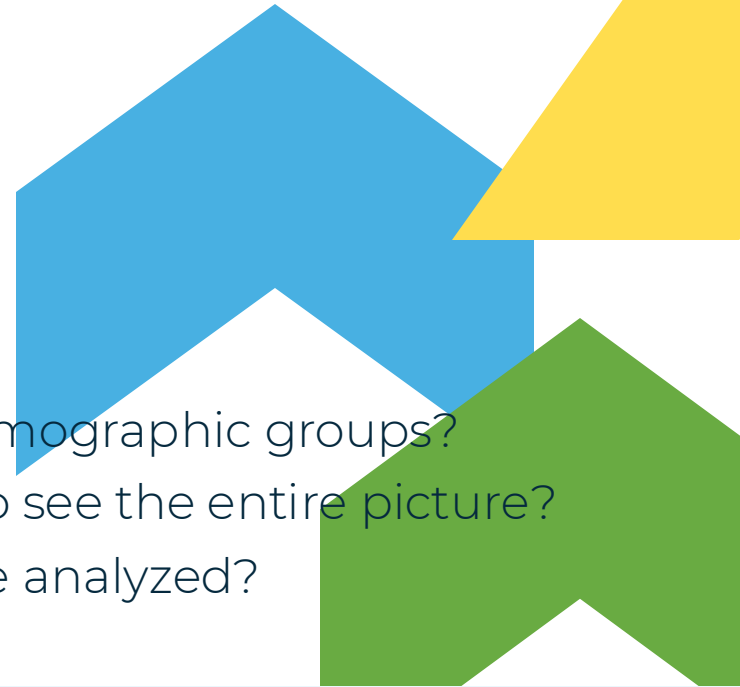
Communication/Transparency

Commitment/Belonging

What did you see as variances among demographic groups?

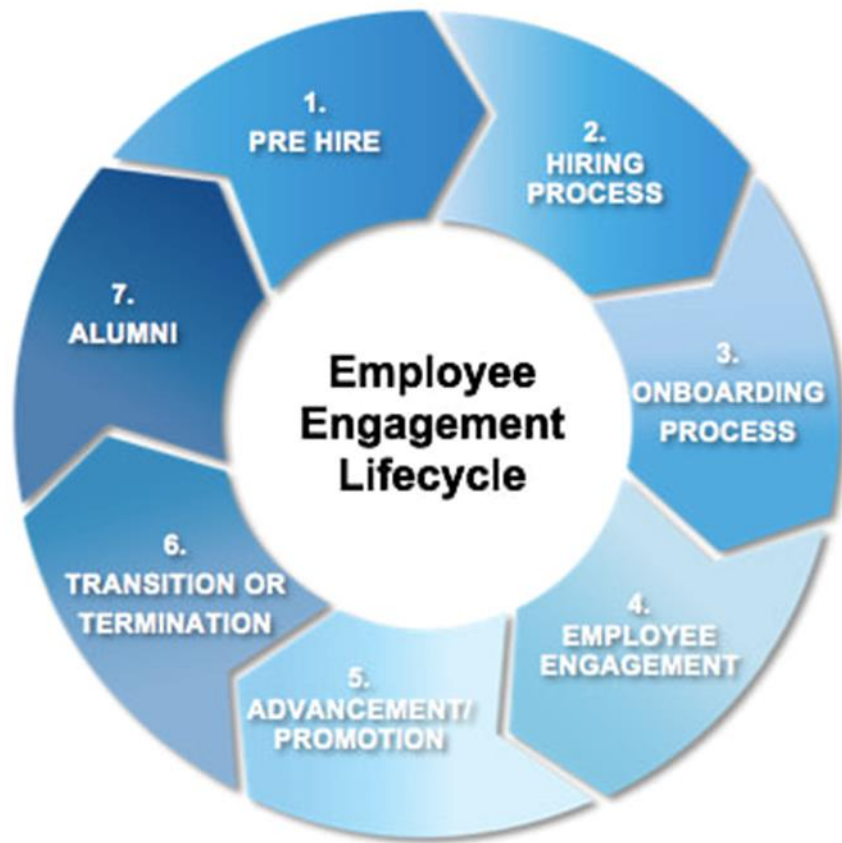
What context must be further explored to see the entire picture?

Does it square with any HR Data you have analyzed?



HR Data Analysis & The Employee Lifecycle





Cultural Strategy Development

Set long-term goals around each component:

What are the components?

What gaps prevent us from meeting these goals?

What outside factors are hurdles?

Do we have the resources?

Prioritize:

What can we accomplish before Y/E?

Does it align with our business goals?

COMMUNICATE RESULTS AND PLANS



Metrics for 3 Different Purposes

Diagnose risk areas and opportunities

Track progress of strategy and initiatives

Calculate ROI of Culture Efforts

Lather. Rinse. Repeat.

Values Based Behaviors: The How To of Culture Building



First Breakout: What has been the
greatest team experience you've ever
had?

Tell us what that dynamic was like.



Second Breakout: What characteristics did your best team have that made it great for YOU? What values were present?



Report Back from Breakouts:



What Do You Value?

What do you value?

What unspoken values have contributed to our success to date?

What do successful employees share in common?

What values should govern the way we interact with each other and with our audience?

Example Case Study

High standards

Quality

Creativity

Impactful

Passion

Insightful

Culture of Responsibility

Sustainable

Vibrant and exciting

Socially responsible



Establish Top 20 Values



Toxic Behaviours:

Why is culture building hard?

What ruins a good culture?

What causes people to give up on a firm?

What must be present ALWAYS to keep people engaged?



In the moment

- Consider the impact you WANT to have with the person before you have the interaction
- Put words to what you are observing and experiencing
- Speak in a manner that is non-confrontational, but clear & straightforward
- Speak from your own perspective, using “I” statements
- Do your best to stay calm ALWAYS
- Contemporaneous feedback with the interaction
- Never give constructive feedback in front of others
- Foster a “call in” culture for feedback and discussion (understanding and ownership)

What does a great team have that makes them great? How does that translate to the individual?

- Beliefs
- Behaviors
- Traits
- Skills
- Actions
- Habits

Culture is simply the result of the interaction amongst the employees working for a considerable period of time in the organization.

Communication and Relationships

Transparency

Alignment of individual to firm vision

Respect, trust, confidentiality

Inclusion includes honesty coupled with compassion

NO blame

Intellectual curiosity: “this is what I heard” “help me understand”

Clarity and management of expectations

Community and Relationships

The covenant to lead

Growth mindsets

Own your own stuff

Respect boundaries

Assume the best

Be brutally honest with yourself

Reflect DAILY on interactions: HOW DID YOU LAND??



Culture Accountability Map

- ID cultural behaviors and who reinforces them.
- Choose 3 core cultural behaviors;
- Who models it? Where is it breaking down? What can reinforce it?
- Assign partners to sponsor each behavior in firm

What's Next?



This is What is Next:

Codify what values you've agreed to with leaders into value statements, then...

What does this value mean to us?

What does it look like in action?

How might it be misinterpreted?

How will we evaluate adherence to it?

How will it change our relationships or our interactions?



BIG CONSIDERATION: Hybrid Workplace



Questions?



Thank You



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