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Culture Is Part of the Operating System

A practical framework for intentionally defining and embedding an authentic culture that reflects how a firm makes decisions, develops people, and runs the business.

WHO THIS IS FOR: Owners, principals, COOs, and leadership teams in founder-, family-, and partner-led wealth management, family-office, and professional-services firms navigating growth, succession, professionalization, or integration.

> **The paradox at the center of this framework**
>
> You can choose to shape your culture. You cannot choose whether you have one.

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Practitioner guidance only. This framework is not legal, employment, or HR advice.

Executive Summary

Culture is already operating inside every firm. It is produced not only by stated values, but by the broader operating system: structure, decision rights, leadership behavior, incentives, routines, informal authority, tools, and repeated habits. When those mechanisms and stated values disagree, people learn from the lived reality.

For an established founder-led firm, the task is not to assume the culture needs fixing. Much of the existing culture may be what created client trust, standards, speed, relationships, and performance. The practitioner challenge is to understand it before intervening: protect what creates value, adapt what no longer fits, preserve productive subcultures where they improve performance, and change only what materially obstructs strategy, risk management, talent, or the next stage of growth.

Six practitioner conclusions

1. **Start with understanding, not a culture program.** Engage broadly across levels and functions, compare the stated and lived culture, and assess recurring themes before deciding what needs attention.
2. **The operating system teaches the culture.** Structure, decision rights, incentives, routines, leadership behavior, and informal authority all send signals. When those signals conflict with stated values, the lived system usually wins.
3. **Protect what created value.** In an established firm, culture deserves a presumption of value, not defect. Determine what should be protected, adapted, separated, or changed rather than defaulting to cultural replacement.
4. **Leadership behavior under pressure sets the real standard.** Employees learn what the organization truly values by watching what leaders reward, tolerate, challenge, and do when values become inconvenient.
5. **Scale does not require uniformity.** Founder-led firms eventually need culture to become organizational capability, but productive subcultures and different operating methods can coexist inside clear enterprise standards.
6. **Make culture part of how the firm operates.** Culture becomes durable when it is reinforced through leadership, accountability, talent decisions, rewards, cadence, measurement, and learning rather than managed as a separate HR or communications initiative.

The first practical step

Listen broadly. Compare the stated and lived culture. Assess patterns. Protect what works. Select the critical few areas, if any, that require adaptation or change. Establish ownership and cadence, then repeat.

The Business Case

Culture already influences performance. The question is whether leadership shapes it with the same intentionality applied to strategy, capital, clients, and growth.

> **Central premise**
>
> Culture is not the soft side of the business. It is part of the operating system through which strategy is executed, people develop, decisions are made, and performance compounds.

External evidence supports the business case. Heidrick & Struggles found materially stronger revenue growth among organizations led by what it termed "culture accelerators"; subsequent research found a growing proportion of CEOs viewing culture as a significant influence on financial performance.

Gallup's large-scale engagement research points in the same direction, linking stronger employee engagement with higher profitability and productivity and lower turnover. Engagement is not the same thing as culture, but it is one measurable consequence of the operating environment leaders create.

By 2026, Heidrick's language had shifted toward performance culture: aligning culture explicitly with strategy, behavior, structure, and execution.

What This Framework Addresses

Many organizations can describe their values but cannot describe how those values show up in decisions, incentives, talent development, accountability, or leadership behavior. The gap between the culture a company describes and the culture people actually experience is the operating problem this framework addresses.

Six questions worth answering from behavior, not policy	
1. What gets rewarded?	2. What gets tolerated?
3. How are decisions really made?	4. What happens when someone disagrees?
5. How are people developed and promoted?	6. What do leaders model when pressure rises?

> **A useful test**
>
> If employees would answer these questions differently from leadership, the firm has a culture gap.

Culture Exists Whether You Design It or Not

Edgar Schein’s work remains useful because it separates visible artifacts from espoused values and the deeper assumptions people learn through repeated experience. An organization can have polished values, a compelling purpose statement, and impressive employee programs while teaching very different lessons through everyday behavior.

Layer	Operating interpretation
Artifacts	What people can see: offices, language, rituals, policies, meetings, titles, systems, symbols.
Espoused values	What leadership says matters: purpose, values, principles, standards, expected behaviors.
Underlying assumptions	What people learn is actually true: who has power, what is safe, what gets rewarded, what happens when things go wrong.

> **The pattern worth noticing**
> When the written rule and the lived reality disagree, employees learn from the lived reality.

Founder-led firms make this especially visible. Early culture often forms through the founder’s instincts, standards, relationships, speed, and direct involvement. That can be a competitive advantage. It also means the culture may depend heavily on one person being present to interpret what “good” means.

When owners decide they want to build a company bigger than themselves, that implicit culture eventually has to become organizational capability. There is nothing inherently wrong with choosing not to make that transition. A successful lifestyle company can be exactly the right destination. The problem arises when the ambition is scale but the operating environment remains dependent on the founder.

> **IN PRACTICE**
> Family dynamics are not limited to single- or multi-family offices. They also shape family-owned and family-governed businesses, where history, ownership expectations, personal relationships, and informal authority can influence how decisions really occur. These dynamics belong inside the operating analysis even when they never appear on an org chart or policy document. Navigating them well requires judgment, discretion, and an understanding of both formal and informal authority.

Culture Is Part of the Operating System

Culture does not sit beside the operating system. It is continuously produced by it.

> ### Working definitions
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> **Operating model.** The formal design of how the business is structured and runs: structure, roles, decision rights, governance, processes, technology, resources, and capabilities.
>
> **Operating system.** The broader lived system: the operating model plus leadership behavior, incentives and consequences, cadence and routines, tools and data, informal authority and relationships, and repeated norms.
>
> **The distinction.** The operating model is one component of the broader operating system. Culture is the cumulative behavioral output of that system.

Strategy sets direction. Structure assigns authority and brings discipline. Processes determine how work moves. Incentives signal what matters. Talent decisions show who advances. Leadership behavior establishes what is safe. Technology changes what is visible, easy, or difficult. Repeated together, these mechanisms teach the organization how to behave. Over time, those behaviors and norms become the culture people actually experience.

Operating mechanism	What it teaches people
Strategy and priorities	What leaders repeatedly choose to fund, stop, accelerate, or defer.
Leadership behavior	What leaders model under pressure, especially when values and short-term results conflict.
Decision rights and accountability	Who can decide, who must be consulted, and who answers for the result.
Talent and rewards	Who gets hired, developed, promoted, recognized, compensated, or exited.
Process and cadence	How goals, meetings, commitments, reviews, and escalation actually work.
Tools, data, and technology	What the organization makes visible, measurable, repeatable, and easy to act on.

> ### Culture is an output
>
> Repeated behavior becomes habit. Habit becomes expectation. Expectation becomes culture.

This is why culture work that sits mainly inside HR or communications often disappoints. If the operating mechanisms continue rewarding old behavior, the organization receives two messages. The operating system usually wins.

Use proven models as components, not commandments

No single operating framework owns the answer. EOS, Scaling Up, Lean, the Danaher Business System, and other methodologies each contain useful disciplines. Some describe themselves as business operating systems; in this framework, I refer to them as operating frameworks to distinguish a named methodology from the broader operating system of the firm. The practitioner question is which disciplines fit the organization's maturity, capabilities, resources, and current needs.

Different operating frameworks express the principle differently. EOS embeds Core Values into hiring, performance, rewards, and accountability. Scaling Up connects values and purpose to its People and Strategy disciplines. Lean and the Danaher Business System reinforce continuous improvement through everyday operating behavior. Different methods, same underlying lesson: operating discipline always carries explicit or implicit expectations about how people behave, decide, learn, and work together.

Senge's systems-thinking perspective helps explain why this matters. Culture rarely changes by treating behavior as an isolated HR issue because the organization itself is a system: incentives, structure, decision rights, processes, relationships, and leadership behavior interact over time. A change in one can strengthen or undermine the others.

> **Continuous improvement as culture**
>
> A continuous-improvement culture treats "how we do things" as improvable rather than sacred. The expectation is not that everything changes constantly; it is that evidence, learning, and better judgment can change a process, behavior, or assumption when the current one no longer serves the organization.

> **IN PRACTICE**
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> Operating frameworks rarely work well when applied exactly as designed. One size fits none. Understand the firm's maturity, leadership capability, and resources; then select only the components the organization can realistically adopt and sustain.

> **Related practitioner theme**
>
> The operating model has to fit the business. Maturity usually requires more structure; it does not automatically require more bureaucracy.

Protect What Made the Firm Successful

For an established firm, the existing culture deserves a presumption of value, not defect. It is part of the system that brought the company to where it is. Founder standards, client orientation, informal relationships, speed, judgment, and ways of solving problems may be precisely what created trust and performance.

The difficulty is that what enabled one stage of growth may constrain the next. Changing too broadly can trigger team resistance and founder or principal defensiveness, especially when change is heard as criticism of the history or judgment that built the firm. A transformation leader who moves too quickly can lose trust and sponsorship, and ultimately put the mandate, and sometimes the leader's position, at risk. The discipline is to determine what truly needs to change and what does not.

Decision	Practitioner test
Protect	What still creates advantage and should remain intact: client trust, founder strengths, high standards, productive rituals, and valuable informal networks.
Adapt	What worked at smaller scale but now creates bottlenecks, key-person dependence, weak handoffs, or avoidable friction.
Separate	Where a team, acquired firm, location, or operating cadence performs better with some autonomy inside shared enterprise standards.
Change	What materially conflicts with strategy, values, risk standards, talent, client outcomes, or the next stage of growth.

Selective evolution

The objective is not cultural replacement. Preserve what creates value; adapt, separate, or change only what the strategy requires.

Culture belongs in diligence

In founder-led acquisitions, culture may contain both the strengths being acquired and dependencies that will not scale. If culture influences client service, decision making, talent, and risk, it is part of strategy and part of diligence. Bain's M&A work recommends identifying cultural fault lines before close and deciding what should be assimilated, preserved, combined, or reinvented; TPG describes culture explicitly as strategy. The scale and transaction context may differ materially from a small founder-led RIA acquisition, but the discipline transfers.

Subcultures Can Be Deliberate

A coherent enterprise culture does not require every function or team to operate in the same way. Schein's work on operator, engineering, and executive cultures makes this explicit: different work, expertise, risks, and time horizons naturally create different subcultures. The goal is not uniformity. It is compatibility.

A software or technology team, for example, may work most effectively with Agile methods, sprint cadences, rapid experimentation, and protected build time, while client service and sales teams may place greater weight on relationship continuity, responsiveness, and controlled change. Forcing identical operating norms across both can reduce effectiveness rather than create alignment.

Where the work justifies it, leaders can intentionally create boundaries through reporting structures, decision rights, dedicated workspaces, geography, tools, or distinct cadences. Separation can protect focus, but it is not an excuse for silos or tribalism. Shared values and ethical standards, clear handoffs, data flows, escalation paths, accountability, and regular cross-functional connection still have to be designed.

Subculture is not fragmentation

Different operating methods can coexist inside shared enterprise standards. A healthy subculture strengthens the strategy and has explicit interfaces with the rest of the firm.

ILLUSTRATIVE EXAMPLES

• **W. L. Gore & Associates.** Although much larger than the firms this framework targets, Gore is a useful scalability example. As it grew, it used small-team working and its cluster concept to preserve direct relationships and autonomy within a shared enterprise culture. The relevance is not Gore's size; it is that the design principle survived scale.

• **Fidelity Labs.** Fidelity Investments' in-house innovation incubator uses small, dedicated teams and a Scan-Try-Scale process to build ventures that can scale within Fidelity or become standalone businesses.

Leadership Sets the Standard When Pressure Rises

Culture is easiest to describe when nothing important is at stake. It becomes visible when pressure creates a tradeoff.

- A high performer delivers revenue but repeatedly violates a stated value.
- A senior leader bypasses a process everyone else is expected to follow.
- A mistake surfaces and leadership must choose between learning and blame.
- Bad news threatens a target and an employee decides whether it is safe to raise it.
- Two leaders disagree and the organization watches whether challenge is welcomed or punished.
- A development commitment competes with immediate delivery pressure.

Employees pay more attention to those moments than to the values deck. What leaders do under pressure becomes the real standard.

Edgar and Peter Schein's *Humble Leadership* provides a useful relationship lens. Transactional role relationships are often sufficient for clearly bounded work. Their Level 2 concept adds enough "personization" to recognize the other person as a whole individual, creating better conditions for trust, candid communication, learning, and real-time course correction without requiring friendship or forced intimacy.

Empathy helps a leader understand what someone is experiencing; compassion adds the responsibility to act constructively on that understanding. Compassion does not remove challenge or accountability. It can mean giving difficult feedback, holding a standard, allowing someone to struggle through development, or making a painful decision while remaining genuinely concerned for the person and the outcome.

Leadership shadow

People learn the real culture by watching what leaders do when values are tested.

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Some of the most significant cultural regressions occur when leadership itself breaks the culture or core values it expects others to uphold. At best, employees treat the failure as belonging to the individual leader rather than the organization.

People do not expect perfection from their leaders. I have seen leaders strengthen both their own standing and the credibility of the culture by acknowledging a failure, accepting accountability, learning from it, and not repeating it.

The work is seldom comfortable

Changing an operating culture can be difficult, uncomfortable, and at times isolating. Someone has to surface the gap between aspiration and lived reality. That can mean challenging long-held assumptions, confronting inconsistencies, or asking leaders to change behaviors that previously helped them succeed.

The reward is equally real. Some of the most meaningful operating outcomes come from equipping people to solve problems they could not previously solve, helping leaders grow into broader roles, and seeing an organization become capable of things that were once dependent on a few individuals.

Equip before you empower

Give people the knowledge, capability, judgment, resources, and support they need to succeed independently. Empowerment without those foundations can create responsibility without readiness and unintentionally set people up to fail.

To Grow the Company, Grow People Who Grow Others

Organic growth requires growing people as deliberately as you grow revenue.

Revenue growth eventually creates a capability requirement. More clients, more complexity, more locations, more services, and more decisions cannot remain concentrated in the same few people. Sustainable organic growth therefore requires leadership development, career pathing, succession depth, and the deliberate expansion of decision-making capacity throughout the organization.

Daniel Pink’s autonomy, mastery, and purpose provide a useful motivational lens: career paths should progressively expand appropriate autonomy, create opportunities for mastery, and connect individual growth to meaningful contribution.

Growth discipline	What it looks like in practice
Career pathing	Make the next level visible: the capabilities, experiences, behaviors, and results required for broader responsibility.
Leadership development	Teach people to create clarity, make decisions, coach others, handle conflict, and own outcomes.
Progressive delegation	Give people real scope before the organization desperately needs them to have it.
Succession and bench strength	Develop more than one person capable of carrying critical knowledge, relationships, and authority.

Growth discipline	What it looks like in practice
Leaders who develop leaders	Make developing the next layer part of a leader’s job, not a side activity delegated to HR.

Equip before you empower

Give people the knowledge, capability, judgment, resources, and support they need to succeed independently. Empowerment without those foundations can create responsibility without readiness and unintentionally set people up to fail.

A career path is not a promotion promise

It is clarity about what someone needs to learn, demonstrate, and own before broader responsibility becomes appropriate.

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A people-growth program works when development is attached to the operating cadence, not treated as an HR calendar. Define the next role and capabilities, assess readiness, assign broader ownership, coach against the plan, and hold leaders accountable for developing the next layer. The output is greater organizational capacity, not a completed development plan.

A company does not build leadership depth by declaring that people matter. How to build that capability is developed in the related practitioner framework of the same name. Here, the point is narrower: how leaders develop people is itself a cultural signal and an operating requirement for scale.

The Minimum Required Operating Disciplines

Culture becomes operational when leadership can point to the recurring mechanisms that reinforce it. The objective is not more culture activity. It is alignment between the behaviors the firm says it needs and the way the business actually runs.

Discipline	What it requires
1. Leadership modeling	Senior leaders visibly demonstrate the behaviors expected of others, especially under pressure and when exceptions are tempting.
2. Decision rights and accountability	People know where authority sits, how disagreement is resolved, and who answers for the outcome.
3. Career pathing and people development	The firm defines growth paths, assesses readiness, creates stretch, and holds leaders accountable for developing the next layer.

Discipline	What it requires
4. Feedback and learning loops	Feedback is timely, candid, two-way, and tied to observed behavior and explicit development or performance expectations. Learning loops turn feedback into adjustment, follow-through, and better operating behavior.
5. Rewards, recognition, and consequences	Promotion, compensation, recognition, and corrective action reinforce the stated culture rather than contradict it.
6. Cadence, measurement, and systemic alignment	Goals, meetings, scorecards, onboarding, performance management, structure, process, and technology reinforce the same priorities and behaviors.

> **The system teaches the culture**
>
> If leaders want different behavior, they eventually have to change the mechanisms that keep producing the old behavior.

Measurement without pretending culture is a single number

Culture should not be reduced to an engagement score or a universal scorecard. Measurement should begin with the culture and strategy the organization is intentionally trying to reinforce, then select a small set of observable signals that show whether those behaviors are becoming real.

The examples below are starting points, not prescribed metrics. Each organization should adapt them to its strategy, maturity, operating model, and the specific behaviors it is trying to reinforce.

Area to observe	Examples to adapt
Leadership behavior	Consistency under pressure; exceptions to stated standards; accountability; follow-through on commitments.
People growth	Development progress; readiness for broader roles; internal advancement; succession depth.
Employee voice and trust	Whether concerns, mistakes, disagreement, and improvement ideas surface early enough to act on them.
Execution and operating discipline	Decision speed; commitment reliability; recurring workarounds; rework; unresolved escalations.
Talent and client/business outcomes	Regrettable turnover; retention of strong people; client and quality outcomes; relevant growth or operating results.

Use trends and triangulation, not a composite culture score. Establish a baseline, look for movement and contradictions over time, and combine quantitative signals with qualitative evidence. The objective is enough evidence for leadership to judge whether the operating environment is reinforcing the culture it intends.

Implement Without Creating a Culture Program

A company does not need a large culture initiative to begin. In many founder-led firms, the more useful first step is to make the existing culture visible and connect the few behaviors that matter most to the strategy.

Culture should be treated as a learning system, not a launch: observe, test, learn, adapt. Compare the intended culture with lived evidence, identify the mechanism producing the gap, change it deliberately, and observe again.

> **IN PRACTICE**
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> Values become performative when leaders proclaim them more strongly than they practice them. A stated commitment becomes credible only when employees see it reflected in decisions, incentives, talent practices, and leadership behavior. The practitioner's role is to translate stated values into those operating mechanisms.

Start with understanding

Begin with understanding rather than a predetermined solution. The sequence below is deliberately adaptive: it establishes what is true, protects what already works, changes only the mechanisms that matter, and then returns to listening and observation.

> **Assess the stated and lived culture**
>
> In smaller firms, engage every team member where practical; in larger firms, use a representative cross-section across levels, functions, tenure, and locations. Do not limit the work to direct reports or senior leaders. That can distort the picture and signal that some voices matter more than others.
>
> Use a consistent set of open questions, including the six questions earlier in this framework. Be explicit that the purpose is to understand the lived culture, not to judge or promise action in the moment. Listen carefully without agreeing, explicitly or implicitly, with a conclusion or proposed solution before the evidence has been assessed.
>
> Capture the feedback, then assess it thematically. Recurring patterns deserve more weight than isolated views; outliers may still matter, but should be tested rather than treated as representative. Close the loop by sharing the themes and priorities, what will remain unchanged, and what happens next.

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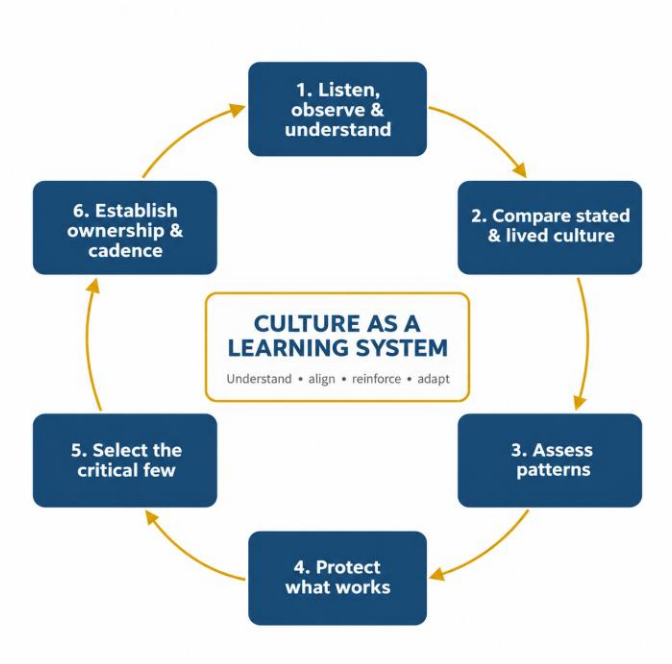
I have used this approach over an initial twelve-week period: broad engagement across the organization, structured notes, thematic synthesis, and then a transparent return of the findings and priorities. Closing the loop - what I heard, what would be prioritized, what would remain unchanged, and what would happen next - built trust and turned listening into a prioritized operating plan rather than an exercise in collecting opinions.

Culture is a learning system



The loop above shows the recurring cycle. The table below expands each step into the corresponding practitioner action.

Start	Practitioner action
1. Listen, observe & understand	Engage broadly across levels and functions. Use consistent open questions and listen to understand, not to endorse.
2. Compare stated and lived culture	Compare what the organization says matters with what people actually experience through decisions, behaviors, rewards, consequences, and leadership actions.
3. Assess patterns	Synthesize the input thematically. Look for recurring patterns and contradictions rather than allowing isolated views or individual grievances to drive conclusions.
4. Protect what works	Identify the cultural and operating strengths, including productive subcultures, that contributed to the firm's success and should not be unintentionally disrupted.

Start	Practitioner action
5. Select the critical few	Use Protect / Adapt / Separate / Change to determine which gaps genuinely matter and which operating mechanisms, if any, require attention.
6. Establish ownership and cadence	Build reinforcement, measurement, feedback, and review into how the business already operates. Then return to listening and observation as the next cycle begins.

The standard is not perfection

The objective is a culture that is increasingly deliberate, internally consistent, and capable of supporting the strategy the firm has actually chosen.

Closing Perspective: Make Culture How the Firm Operates

The strongest culture work does not begin with the assumption that something is broken. In an established firm, much of the lived culture may be part of what made the organization successful. The work is to make that culture visible, protect what continues to create value, and change only what the strategy, scale, risk profile, or future capability now requires.

When culture is understood and intentionally reinforced, people know how decisions get made. They know what standards apply. They know whether disagreement is safe and what growth requires. Managers know they are accountable for developing people. Leaders understand that their own behavior is part of the control environment. The operating system reinforces what should be preserved and enables thoughtful adaptation where needed.

Get started deliberately

1. Observe the lived culture. Create a grounded view of what people actually experience, including what already works and should be protected.

2. Clarify the behaviors that matter. Identify which existing values and behaviors already support the strategy, whether or not they have been intentionally defined, and where greater clarity or adaptation is needed.

3. Align the operating mechanisms. Preserve the mechanisms that reinforce what works, and make only the changes required to decision rights, incentives, cadence, talent practices, or leadership expectations.

4. Grow people who grow others. Where growth requires it, strengthen leadership depth, coaching capacity, and organizational capability.

5. Then keep learning. Evaluate the lived evidence, reinforce what continues to work, and adapt only where experience shows it is needed.

Culture is not a destination or a campaign. It is the cumulative result of how the organization leads, decides, rewards, develops, communicates, and operates.

If this is useful to you

I work with founder-, family-, and partner-led firms to make the lived culture visible, identify what should be protected, and determine where operating practices, leadership behavior, or structure may need to adapt.

The work is practical: broad listening, thematic assessment, clear priorities, and alignment of the operating mechanisms that reinforce how the firm wants to work and grow.

If this framework is useful, I am glad to talk it through.

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About the author

Matt Chambers is a wealth management operating executive and founder of 718 Innovations LLC, which he formed in 2020 as an advisory vehicle for select independent engagements. His career has remained centered on executive operating leadership including a $17 billion multi-family office and founder-led advisory firms, with responsibility spanning client and investment operations, finance, people, technology, risk, growth, and enterprise change.

He has served as COO, Chief People Officer, and CIO, partnering with founders, CEOs, and senior leaders to translate strategy into accountable execution and build the operating capability required to scale.

His involvement in intentional organizational culture development dates to 1999 at Picasso Software, where, while helping build a financial-services consulting practice from six people to eighty, he was directly involved in defining and implementing how the growing organization would work, lead, and behave. His formal research on organizational culture includes a longitudinal action-research MBA dissertation under an approved ethics and confidentiality framework. This practitioner framework draws on that research, prior and subsequent operating experience, and current external evidence.

The objective of the work is practical: help organizations build capability, not dependence.

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