Sage Values & Behaviors

Playbook
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Look out for this icon
wherever you see it, rollover for some extra information
CEO Message

We are the global market leader for integrated accounting, payroll and payment systems, supporting the ambition of the world's entrepreneurs.

We want Sage to be the best place to work, to represent a great time in our careers and to deliver the best experience for our customers.

Sage has enjoyed a fabulous past but the world has changed and our ambition is greater. We must continuously improve and change.

We have a great strategy and our success will depend on how well we execute our strategy as it will on the high performance culture we build.

The Sage Values and Behaviors explain the way we work and how we behave here, including how we hire and how we evaluate performance.

You will find valuable information about our operating model in the Sage Way and I encourage you to read this.

Our commitment is to put the customer at the heart of everything we do and to live and breathe our values every day.
Sage Values

Sage Values and Behaviors are an enabler to our strategy. They help us achieve our ambitions.

Customers First  Velocity  Do the Right Thing  Innovate  Make a Difference
# Sage Values translate to Sage Behaviors

## Sage Behaviours Overview

<table>
<thead>
<tr>
<th>Values</th>
<th>Customer first</th>
<th>Velocity</th>
<th>Do the Right Thing</th>
<th>Innovate</th>
<th>Make a Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customer Focus</strong></td>
<td>Building strong customer relationships and delivering customer-centric solutions.</td>
<td><strong>Action Oriented</strong></td>
<td>Taking on new opportunities and tough challenges with a sense of urgency, high energy and enthusiasm.</td>
<td><strong>Instils Trust</strong></td>
<td>Gaining the confidence and trust of others through honesty, integrity and sincerity.</td>
</tr>
<tr>
<td><strong>Managers</strong></td>
<td><strong>Customer Focus</strong></td>
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<tr>
<td><strong>Senior Management Team</strong></td>
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<td><strong>Instils Trust</strong></td>
</tr>
</tbody>
</table>
# What good looks like

## Sage Behaviors by Level

### Values

<table>
<thead>
<tr>
<th>Customer first</th>
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<td>Cultivates Innovation</td>
<td>Collaborates</td>
</tr>
<tr>
<td>Anticipates future needs of our customers and uses this knowledge to shape our customer proposition 3-5 years ahead.</td>
<td>Takes on new challenges with enthusiasm and a sense of urgency.</td>
<td>Gains the confidence and trust of others easily. Honours commitments and keeps confidence.</td>
<td>Spots opportunities to do things better and shares best practice.</td>
<td>Builds and maintains strong working relationships and works with colleagues to meet shared goals.</td>
</tr>
<tr>
<td>Customer Focus</td>
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<td>Cultivates Innovation</td>
<td>Collaborates</td>
</tr>
<tr>
<td>Uses their understanding of our customers to take proactive action to improve their experience. Builds and deliver solutions that exceed customers expectations.</td>
<td>Spots opportunities, engages the right people and create plans to makes things happen.</td>
<td>Role models high standards of honesty and integrity. Shows consistency between what they say and how they act.</td>
<td>Views innovation as a priority. Builds excitement and encourages others to generate ideas and nurtures the best ones to fruition.</td>
<td>Takes a proactive interest in other business areas and works across functions; bringing the right people together and offering resources to ensure we deliver what’s important.</td>
</tr>
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<td>Customer Focus</td>
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<td>Collaborates</td>
</tr>
<tr>
<td>Anticipates future needs of our customers and uses this knowledge to shape our customer proposition 3-5 years ahead.</td>
<td>Rise to the challenge when things get tough and focuses on finding a solution. Not afraid to take risks in the interests of the business.</td>
<td>Direct and truthful. Expresses self in a credible and transparent manner. Inspires others to drive things forward. Not afraid to take risks in the interests of the business.</td>
<td>Embraces the concept that the business should never stand still and should constantly be innovating. Challenges the status quo and does not settle for anything but #1.</td>
<td>Models collaboration at a global level. Promotes high visibility of shared contributions to goals. Facilitates open dialogue with a wide variety of contributors and stakeholders.</td>
</tr>
<tr>
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<tr>
<td>Uses their understanding of the business and our culture to move things forward and to make sure initiatives land. Navigates their way comfortably through ‘the fog’.</td>
<td>Intuitively forms teams with an appropriate and diverse mix of styles, perspectives and mindsets. Establishes common goals, rewards efforts and deals with underperformance effectively.</td>
<td>Embraces the concept that the business should never stand still and should constantly be innovating. Challenges the status quo and does not settle for anything but #1.</td>
<td>Can comfortably shift their thinking between the short and long term.</td>
<td>Models collaboration at a global level. Promotes high visibility of shared contributions to goals. Facilitates open dialogue with a wide variety of contributors and stakeholders.</td>
</tr>
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Core Behaviors
In focus
Customer Focus

**Building strong customer relationships and delivering customer centric solutions**

**Skilled**
- Anticipates customer needs and provides services that are beyond customer expectations.
- Uses customer insights to drive and guide the development of new offerings.
- Serves as a strategic partner to build, grow, and maintain profitable and long-lasting relationships with key accounts.

**Unskilled**
- Is unaware of customer expectations.
- Acts on incomplete or inaccurate understanding of customer needs.
- Conducts work activities from an internal, operational standpoint.
- Fails to build effective relationships with key customers.

**How to Develop**
- Manage a dissatisfied internal or external customer; troubleshoot a performance or quality problem with a product or service.
- Train customers or a community organization in the use of Sage products or services. Collaborate with them. Make them feel involved.
- Do a customer satisfaction survey in person or by phone, and present the results to the people involved.
- Work a few shifts in the telemarketing or customer service department, handling complaints and inquiries from customers. Experience your customers firsthand.
- Spend time with internal or external customers. Write a report on your observations, and present it to the people involved.

“Whatever you do, do it well. Do it so well that when people see you do it, they will want to come back and see you do it again, and they will want to bring others.”

Walt Disney
Action Orientated

Taking on new opportunities and tough challenges with a sense of urgency, high energy, and enthusiasm

Skilled
• Quickly and decisively takes action in fast-changing, unpredictable situations.
• Shows a tremendous amount of initiative in tough situations; is exceptional at spotting and seizing opportunities.
• Displays a can-do attitude in good and bad times.

Unskilled
• Is slow to act on an opportunity.
• Spends too much time planning and looking for information.
• May be overly methodical, taking too long to act on a problem.
• Is reluctant to step up to challenges; waits for someone else to take action.

How to Develop
• Volunteer to be part of a project that will require driving many actions within very aggressive time frames.
• Take on a daunting task such as stepping in to fix an issue/critical initiative that has stalled, lost focus, or encountered major obstacles.
• Identify and pursue a bold new opportunity for the organization, team or community. Make a case for the new idea, draft a plan of action, and carry forward the steps needed to ensure successful returns.
• Turn around the performance of a project team or group that has become bogged down by many competing priorities. Provide a clear path forward and execute the vital actions necessary for success.

“You are what you do, not what you say you’ll do”
Carl Jung – Swiss psychiatrist
Instils Trust

Gaining the confidence and trust of others through honesty, integrity, and authenticity

Skilled
- Gains the confidence and trust of others easily.
- Honors commitments and keeps confidences.
- Expresses self in a credible and transparent manner.
- Models high standards of honesty and integrity.

Unskilled
- Lacks consistent follow-through on commitments.
- Betrays confidences and covers up mistakes.
- Misrepresents facts for personal gain.
- Has trouble keeping confidences.
- Makes promises but doesn’t always keep them.

How to Develop
- Mediate a conflict between two people or groups, where you’ll need to gain the trust of both parties and facilitate an honest discussion leading toward resolution.
- Volunteer to be a liaison or spokesperson for your organization in the local community, requiring you to instill trust while addressing the concerns they have related to your company’s practices.
- Lead a team or group that is experiencing resistance due to a recent change (e.g. new structure, downsizing); practice restoring trust between the group and management.

“Always do right. This will gratify some people and astonish the rest.”

Mark Twain – American writer, humorist, and lecturer
Cultivates Innovation

Creating new and better ways for the organization to be successful

**Skilled**
- Moves beyond traditional ways of doing things; pushes past the status quo.
- Continually assesses the market potential of an innovative idea or solution.
- Finds and champions the best creative ideas and actively moves them into implementation.
- Tries multiple, varied approaches to innovative ideas.
- Builds excitement in others to explore creative options.

**Unskilled**
- Stays within comfort zone rather than experimenting with new ways of looking at things.
- Presents ideas that are ordinary, conventional, and from the past.
- Tends to be critical of others’ original ideas.
- Has a style that discourages the creative initiatives of others.

**How to Develop**
- Facilitate a brainstorming session - define and clarify the problem/opportunity, generate ideas using various techniques, and narrow the list to solutions you want to strengthen, test, and implement.
- Benchmark innovative business models, practices, processes, products, or services that come from both well-known and non-traditional competitors/sources, and report your findings to colleagues.
- Take part in an entire innovation cycle for a new product/service - from research, design, concept refinement, and prototyping, through to its launch and use in the marketplace.
- Identify an unmet need for the organization or the community and experiment with different ways to fill the gap. Practice seeing failures or mistakes as opportunities to learn.

“Innovation distinguishes between a leader and a follower.”

*Steve Jobs – Cofounder of Apple Inc.*
Collaborates

Building partnerships and working collaboratively with others to meet shared objectives

Skilled
- Models collaboration across the organization.
- Facilitates an open dialogue with a wide variety of contributors and stakeholders.
- Balances own interests with those of others.
- Promotes high visibility of shared contributions to goals.

Unskilled
- Overlooks opportunities to work collaboratively with others.
- Values own interests above others’.
- Shuts down lines of communication across groups.
- Prefers to work alone and be accountable for individual contributions.

How to Develop
- Work on a project with someone you’ve disagreed with in the past so you can practice give-and-take dialogue, working through conflict, and finding shared goals and values.
- Volunteer to make a presentation on a group project. Ask everyone who participated on the project to help with the presentation and then debrief the situation after you are done.
- Resolve an issue in conflict between two people, units, geographies, functions. Help them share their perspectives, build understanding, and bring the issue to resolution.
- Take on a project that is too large for one person and requires cross-organizational or team collaboration in order to achieve results and solve the problem.

“It’s the group sound that’s important, even when you’re playing a solo”

Oscar Peterson – Canadian jazz pianist and composer
Manager Behaviors
In focus
Drives Engagement

Creating a climate where people are motivated to do their best to help the organization achieve its objectives

Skilled
• Creates a positive and motivating working environment.
• Knows what motivates different people and aligns work accordingly.
• Gives others appropriate latitude to get work done.
• Invites input from others.
• Makes people feel that their contributions are visible and valued.

Unskilled
• Has little insight into what motivates others.
• Doesn’t give people enough flexibility and autonomy to do their work.
• Does little to create enthusiasm.
• Is unwilling to share ownership and give up control of assignments.

How to Develop
• Pull together a creative-thinking group, inviting people from all functions, at all levels, to share their ideas on overcoming key business challenges.
• Volunteer to lead a group through a change where there is a high level of resistance. Take time to understand what’s causing people to feel as they do about the change and help them work through it.
• Lead an engagement task force to identify what needs to be done to increase levels of engagement across the organization. Report findings and recommendations back to senior management.
• Take on a failing project and rally a team to turn it around. Involve everyone fully in generating ideas for making the project a success and give them accountability.

“The simple act of paying positive attention to people has a great deal to do with productivity.”

Tom Peters – American management consultant and author
Develops Talent

Developing people to meet both their career goals and the organization’s goals

**Skilled**
- Views talent development as an organizational imperative.
- Consistently uses multiple methods to develop others.
- Stays alert for developmental assignments both inside and outside own workgroup.
- Readily articulates the value and benefit of stretch assignments to others.

**Unskilled**
- Doesn’t take time to work on development of others.
- Is a check-the-box developer; goes with the easiest option to fulfill talent development obligations.
- Doesn’t make use of available organization resources and systems to develop others.
- Has difficulty identifying developmental moves or assignments.

**How to Develop**
- Volunteer to mentor someone outside your unit. Understand their goals and expectations and make sure you’re tailoring your approach to meet their needs.
- Manage a team of inexperienced people. Work with each individual to create a 70:20:10 development plan to build the skills they need. Review and appraise progress regularly.
- Take responsibility for developing an underperformer. Start by giving them a fair and accurate appraisal of their current strengths and weaknesses and clarify the performance gap.

“The mediocre teacher tells. The good teacher explains. The superior teacher demonstrates. The great teacher inspires.”

William Arthur Ward – American writer
Ensures Accountability

Holding self and others accountable to meet commitments

Skilled
- Assumes responsibility for the outcomes of others.
- Promotes a sense of urgency and establishes and enforces individual accountability in the team.
- Works with people to establish explicit performance standards.
- Is completely on top of what is going on and knows where things stand.
- Provides balanced feedback at the most critical times.

Unskilled
- Fails to accept a fair share of personal responsibility.
- Gathers little information about how things are going.
- Provides inadequate feedback; fails to help others adjust course midstream.
- Prefers to be one of many accountable for an assignment.

How to Develop
- Put yourself forward to lead the resolution of a tough problem that requires help from others. Recognize what others have to offer and how they can support you.
- Volunteer to present a proposal to a senior team that you know will provoke contention, raise challenging questions, and encourage debate. Be prepared to fight your corner.
- Work on a project that analyzes performance and results and take responsibility for feeding back the outcome to those involved.
- Design a set of formal and informal measures of progress for your current responsibilities. Review your progress on an ongoing basis.

“I attribute my success to this – I never gave or took any excuse”

Florence Nightingale – English social reformer and founder of modern nursing
SMT Behaviors

In focus
Organizational Savvy

Manoeuvering comfortably through complex policy, process, and people-related organizational dynamics

Skilled
- Navigates the political complexities of the organization easily.
- Has a clear understanding of other groups’ business priorities.
- Avoids provoking tension between groups.
- Uses knowledge of organizational culture to achieve objectives.

Unskilled
- Overlooks or disregards the political complexities of the organization.
- Pursues own area’s goals without considering the impact on other groups.
- Says and does things that strain organizational relationships.
- Tends to be impatient with organizational processes and makes political errors.

How to Develop
- Relaunch an existing product or service that’s not doing well. Investigate why it’s not successful. Identify what is needed for it to be successful.
- Work on a team looking at a reorganization plan. Work on fully understanding where the organization is headed. Do your homework on the organization, including any strategic planning or vision statements to help inform the organizational structure.
- Conduct a postmortem on a failed project and present the findings to the people involved. Involve them in discussions about how things will need to be approached differently next time.
- Volunteer to find a way of bringing together and/or aligning processes, systems, or procedures from across a range of business units.

“Today's complex organizations demand that we become more sophisticated with respect to issues of leadership, power and influence”

John P. Kotter, Author
Builds Effective Teams

Building strong-identity teams that apply their diverse skills and perspectives to achieve common goals

**Skilled**
- Defines success in terms of the whole team.
- Recognizes that leveraging each team member’s unique background and perspective is critical to achieving team goals.
- Rallies others behind common team goals.
- Places team goals ahead of own goals.

**Unskilled**
- Doesn’t create a common mindset or challenge.
- Fails to recognize that morale, recognition, and belongingness are integral ingredients of effective teams.
- Prioritizes and rewards individual efforts rather than team achievements.
- Doesn’t shape and distribute assignments in a way that encourages teamwork.

**How to Develop**
- Be an active member of a virtual team, ensuring all members stay connected, motivated, and productive.
- Coach a team that is demonstrating lack of trust, split focus, or suboptimal performance.
- Lead a community project team outside the workplace, practicing teaming skills you want to improve. Gather feedback from members of the project team, then apply the feedback on the job.

“Talent wins games, but teamwork and intelligence win championships.”

Michael Jordan – American basketball player
# Strategic Mindset

**Seeing ahead to future possibilities and translating them into breakthrough strategies**

**Skilled**
- Sees the big picture, constantly imagines future scenarios, and creates strategies to sustain competitive advantage.
- Is a visionary and able to articulately paint credible pictures and visions of possibilities and likelihoods.
- Formulates a clear strategy and maps the aggressive steps that will clearly accelerate the organization toward its strategic goals.

**Unskilled**
- Is more comfortable in the tactical here and now.
- Spends little time or effort thinking about or working on strategic issues.
- Contributes little to strategic discussions.
- Lacks the disciplined thought processes to pull together varying elements into a coherent view.

**How to Develop**
- Take on a project or assignment that requires significant strategic thinking and planning with colleagues from various disciplines, divisions, or geographies.
- Prepare and present a strategic proposal to senior leaders that involves charting new ground. Identify the trade-offs inherent in any strategic decision.
- Do a thorough trend analysis and environmental scan of your function, unit, or organization as part of the strategic planning process.
- Manage an aspect of a rapidly expanding or growing operation that is instrumental to the organization’s strategy.
- Conduct a competitive analysis of your organization’s products/services and position in the marketplace.

“In strategy, it is important to see distant things as if they were close and to take a distanced view of close things.”

Miyamato Musashi, Japanese swordsman and samurai