

# The TEAM Code

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Who we are. What we do. Who we aspire to be.

# What is this thing?

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This document is a back-to-the-basics blueprint outlining who we are, what we do and who we aspire to be. Think of it like a strategic operating guide that drives our company, empowers and inspires employees, and gives some insight into what makes us different from other software companies out there.

It's part brand statement, part employee manual, part customer service manifesto. In short, we're defining exactly what makes TEAM — TEAM.

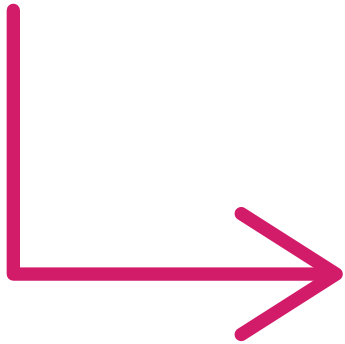
So, whether you're a TEAM employee (or want to be) or you're a TEAM customer (or want to be), we think this code will give you a pretty good idea of what makes us tick.



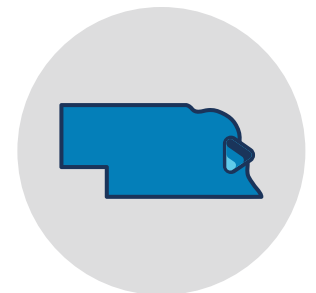
# A History Lesson: How It All Started

It was the early 1980s. Computers were hulking pieces of equipment and mobile phones were things of science fiction. But that didn't stop one janitorial and security contracting company in Omaha, Nebraska, from looking for better ways to do things through technology.

Specifically, the CFO was on the hunt for an easy way to determine profitability by job.



- » **What were the labor costs, materials and other direct costs that went into each service location?**
- » **Were they bidding each site correctly?**
- » **Which jobs were making the most money – and, likewise, which ones were actually costing the company money?**





**In short, he knew  
that they could  
**DO MORE.****

## The Original Team

He tried sourcing an industry-specific business management system, but one didn't exist at the time. So, he assembled a small team to build one. The team was made up of Frank Labeledz, the CFO and idea guy; Sherri Labeledz, software testing whiz; and Darrell Uttecht, the intrepid software programmer.



Together, they developed the prototype for a one-of-a-kind system — what is now known as WinTeam. Frank, the visionary, realized this unique solution could make a significant difference for other businesses in the industry with similar challenges. So, they started a new company to offer the solution to other contractors. That's how TEAM Software (formerly Team Financial Management Systems) was formed in 1989.



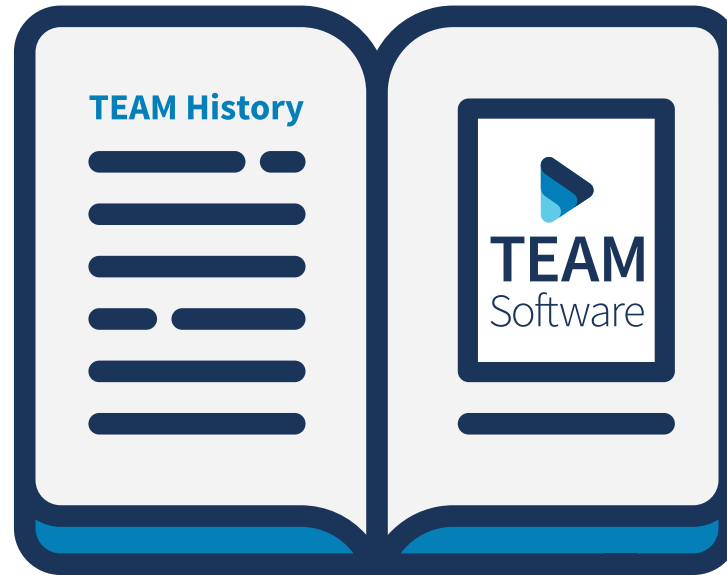
**Frank Labeledz**  
CFO and Idea Guy



**Sherri Labeledz**  
Software Testing Whiz



**Darrell Uttecht**  
Intrepid Software Programmer



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In 2005, TEAM formed an Employee Stock Ownership Plan (ESOP). After leading the company as President and CEO for 27 years, Frank transitioned to Chairman of the Board, and TEAM welcomed new President and CEO John Leiferman during the summer of 2015. Three years later, Jill Davie was named President and Leiferman continued as CEO. In September of 2018, TEAM closed its employee ownership chapter and began a new one as part of a strategic partnership with Accel-KKR, a technology-focused investment firm. Frank officially retired as Chairman, but we still see him around the office, working out in the onsite gym every week.

# The TEAM Difference

The greatest technology in the world hasn't replaced the ultimate relationship building tool between a customer and a business: the human touch.

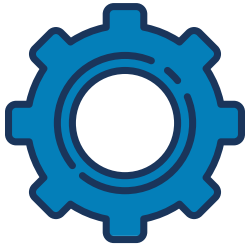
– Shep Hyken, Customer Service Guru

# Why TEAM is Different (and Better) Than the Other Guys

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We have a deep focus on the industries we serve.



We make connected solutions for any size company.



We take a people-centric approach to business and nurture a culture to support it.



# We have a deep focus on the industries we serve.

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TEAM grew out of a service contracting company. We were our own first customer. We've been around since 1989, so we've been doing this a long time. And, we're not going anywhere.



## We make connected solutions for any size company.

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Our signature product, WinTeam, is a holistic industry-specific ERP that drives efficiency across organizations, pinpoints profitability and connects workforces out in the field to the back office. Q is a right-sized toolset to connect workforces, provide field visibility and save time.

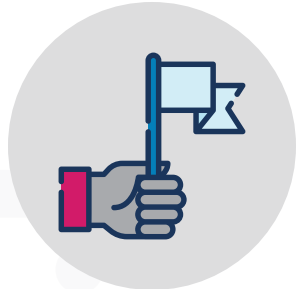


# We take a people-centric approach to business and nurture a culture to support it.

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It means we prioritize people over process and relationships over revenue. That creates empowered, empathetic employees who create happy, engaged customers.

MISSION



# Here's what we're committed to (mission):

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We help our customers do more and empower their people through efficiency-enhancing technology.

# That drives us toward our goal (vision):

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We will make companies with distributed workforces more productive, competitive and successful through transformative technology.



VISION

**We work together to accomplish the day-to-day and the longer-term through belief in three core values:**

- 1** Keep customers first.
- 2** Be accountable.
- 3** Do more.

VALUE  
CUSTOMERS



## Keep customers first.

We do business with a customer-first mentality. We challenge each employee to begin and end each day with a customer-focused action. That's because we're people-centric and committed to developing strong, long-term relationships and providing an excellent experience. This gives us the opportunity to listen to our customers' needs. With that knowledge and our drive to deliver value, we create solutions that increase efficiency and boost profit for our customers.

**Because when they're successful, we are, too.**

**#customersfirst**



## Be accountable.

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We hold each other accountable to do what we say we're going to do. And, we expect our fellow employees to bring it every day. That's true for not only what we do, but how we do it. We focus on treating each other with respect, being honest and empathetic, collaborating and working hard together. Above all, it's about trusting each other to do the right thing because it's the right thing to do.

**#respect**

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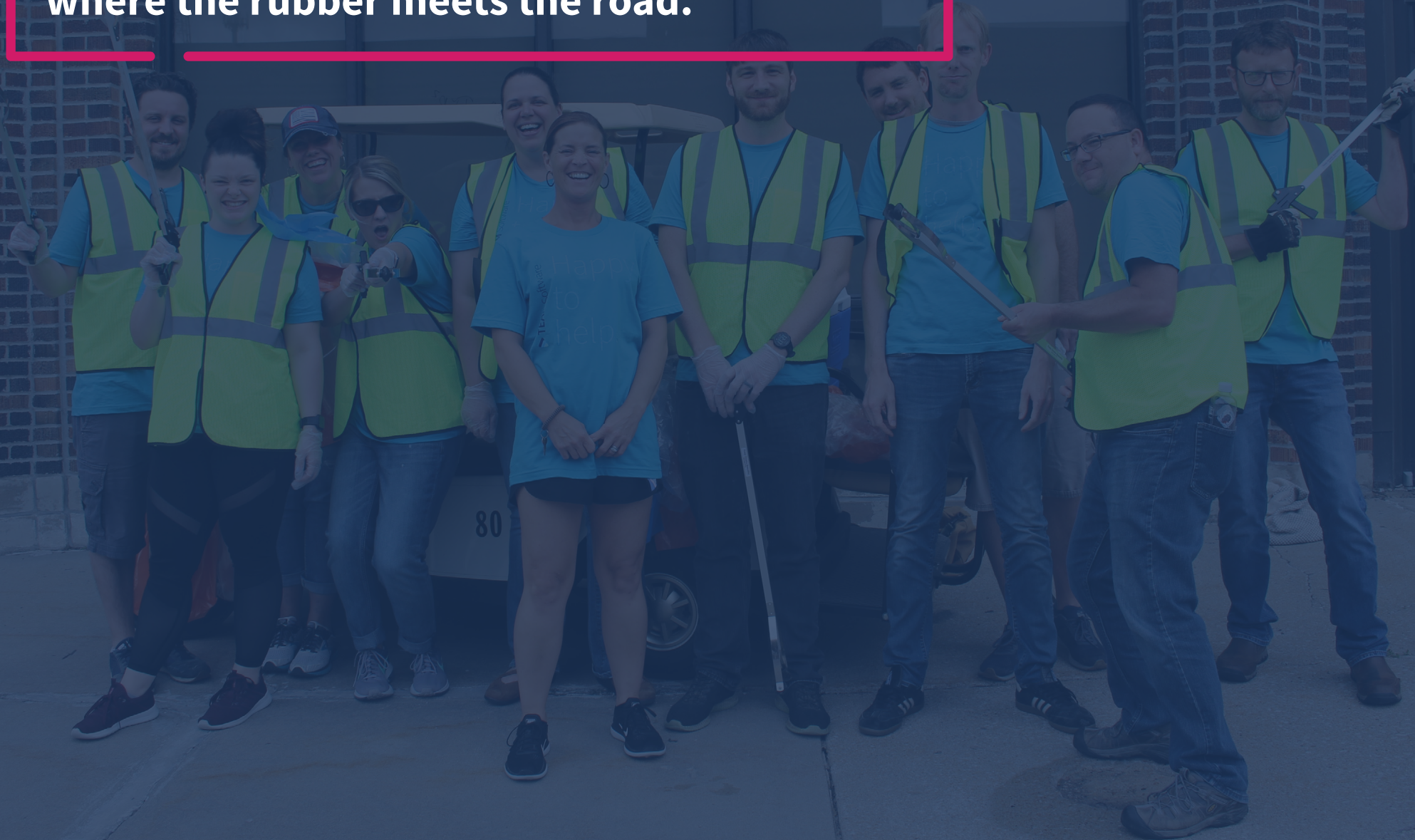
## Do more.

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“That’s not my job” isn’t in our vocabulary. We’re willing to do what it takes to get stuff done — right. We’re achievers and going the extra mile is in our DNA. Our company was built on the idea that we could do more. We changed the game in 1989 with an all-in-one financial, operations and workforce management solution. We did it again in 2001 with our Software-as-a-Service offering before “the cloud” was common. And now with our mobile app and next-generation workforce management solution, we’re pushing that legacy forward. Our continued success is a result of our relentless pursuit to define what’s next.

**#GSD**

**Any business can say they have a set of values and make inspirational posters for the wall. But acting in line with those values is where the rubber meets the road.**



# Here's how we put our core values into action:



Communicate openly.



Innovate continuously.



Cultivate and appreciate each other.



Generate results.



Anticipate needs.



# Communicate Openly

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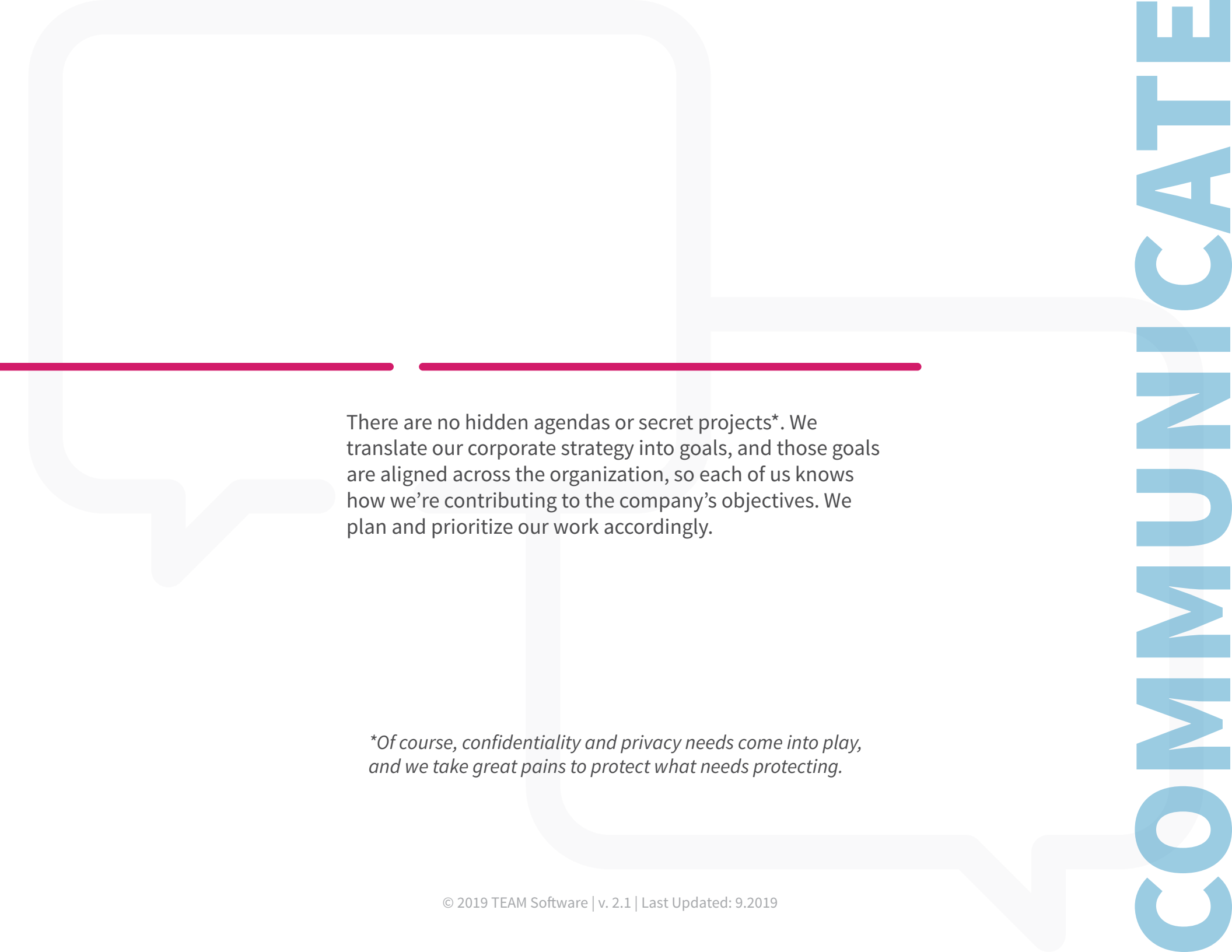
We're open and candid with each other. Communication is always a work-in-progress — we're human after all. But, we do our best to make sure we're actively sharing information across the organization.

# COMMUNICATE

We value honest feedback, so we try to give it (and take it) with kindness and an open mind. (That's true with employees AND customers.) And, while we want to provide opportunities for everyone to be heard, it's not practical, or feasible, to make everyone happy.

“Everyone has a voice,  
but not always a vote.”

— HubSpot



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There are no hidden agendas or secret projects\*. We translate our corporate strategy into goals, and those goals are aligned across the organization, so each of us knows how we're contributing to the company's objectives. We plan and prioritize our work accordingly.

*\*Of course, confidentiality and privacy needs come into play, and we take great pains to protect what needs protecting.*

# COMMUNICATE

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We gather once a quarter to review our company financial metrics and project progress. All of us. That means, we all know whether we're meeting expense and revenue targets. We all know the status on our big initiatives. And, we all know where we need to put more focus and work a little harder.



# Innovate Continuously

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This is a no-brainer. “Innovate or die” is cliché because it’s true.



Hack Day Winners 2019

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In addition to providing onsite innovation workshops for employees, periodically we host innovation events to glean the best ideas from our community of employees. Several of those ideas have been implemented or are currently in the works.



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We've set aside a flexible space specifically for innovation. It's always available for employees to get work done, brainstorm or hammer out action plans. It's also got a ping-pong table to help get those innovative juices flowing.

“It’s important for us to create a culture of innovation  
— one that both values and rewards risk.”

— Barbara Landes, CFO, PBS

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We recognize that an inherent part of innovation is the risk of failure. Remember Google Glass, Facebook Phone, iPhone 5c and Microsoft Zune?

**Our approach?**

**Be smart.**

**Listen.**

**Research.**

**And, the most important — fail fast.**

We know it’s going to happen at some point, but the quicker we recognize an initiative has gone off the rails, the quicker we can learn, adjust and move on.



# Cultivate and Appreciate Each Other

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Employees are our greatest asset and key to our continuing success. That's why we make sure each person we hire is a good fit for our company and can help us achieve our aggressive goals. While skills and experience are obvious qualifiers, a can-do attitude and curiosity are what make the superstars shine. And once we find superstars, we're going to help them build a long-term career here by investing in them.

We do that in various ways including education assistance, leadership programs, lunch 'n' learns, career development paths and learning opportunities.

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We realize that if we want to grow our company, we must grow our people, too. The equation is simple:

**empowered employees**  
**+ a shared commitment to mission/goals**

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**sustainable, scalable growth**



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Superstars attract other superstars (it's like gravitational pull). That's why we offer a generous employee referral program to help us bring those go-getters in the door. To facilitate new employee success from day one, we offer onboarding and training to get them going on the right foot.



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We foster an environment that values wellness and work-life balance. Flexible work arrangements; onsite fitness facility, massages and yoga; free wellness programs; volunteer time off; paid parental leave; and an employee assistance program are just a few of the ways we show it.



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It's not just KPIs and bottom-line numbers. People are always a part of the equation. How we connect to each other and our customers is just as important as the tasks we execute.



**Simply put, a person who  
feels appreciated will always  
do more than expected.**

**We count on that.**



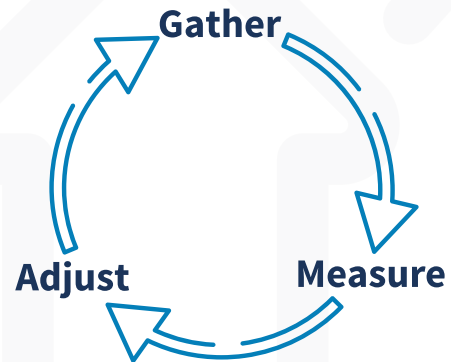
# Generate Results

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This is what it all boils down to: results. How do we get them?

GENERATE

# GENERATE



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Data is king. We gather it, measure it and use it to adjust our strategy and develop realistic goals and objectives going forward. Then we do it again. It's another way we hold each other accountable.



## **Execute. Execute. Execute.**

Strategy is vital, but we must have tactical ways to carry out that strategy. In other words, we need to get stuff done. And, then do more.

# GENERATE



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Focus on our value chain which starts with the customer. Listen, respond and solve their pain points. Do what's best for the customer because, in the end, that's where the real value is.



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The best way to keep generating consistent results? Reward and recognize the people who achieve them. Sometimes it's a simple thank you. Other times it's a gift card and a pat on the back.

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These are the other ways we reward and recognize a job well done:

- » We recognize one employee per quarter who was nominated by his/her peers for going above and beyond expectations.
- » Our employee incentive program is based on both company financial and operating performance (strategic goals we achieve together) and individual contribution (SMART goals you achieve yourself). These rigorous performance measures help drive our culture and reinforce our value chain. In short, if we've met or exceeded our goals, we see a monetary bonus. How's that for a pat on the back?



## Anticipate Needs

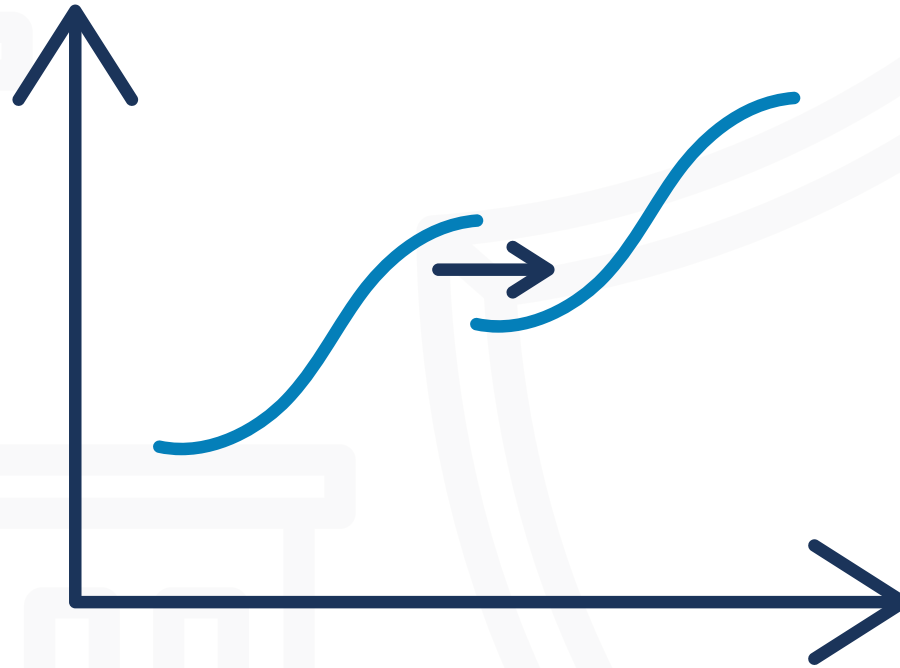
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Over the last 30 years, TEAM has built a reputation on our customer responsiveness and our expertise in the janitorial and contract security industries. As a result, we're the trusted technology leader in our verticals, as proven by our lion's share of the market.

# ANTICIPATE

But what got us to here won't get us to there.

**In other words, to sustain our market leadership position and continue to grow, we can't just respond to customer needs, we have to anticipate them.**



In today's technology-first world, creating a customer experience is about more than just acting on requests. It's about giving customers solutions they didn't know they needed. Guy Kawasaki, Silicon Valley-based speaker and author, calls this "jumping to the next curve." That's where the disruptive innovation is.

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To do this, we've aligned our company and corporate strategy around a product management function that organizes, prioritizes and executes to ensure the success of our products. So, we're better equipped to listen forward, act intentionally, deliver value to customers, expand offerings and scale easily.

**It also better positions us to jump to the next curve.**

A man with glasses and a beard, wearing a dark suit jacket over a plaid shirt, is smiling and gesturing with his right hand towards a blurred crowd of people in the background. The scene is dimly lit with a blue tint. A red rectangular border frames the text in the center.

**See you there.**