

The first part of the document discusses the importance of maintaining accurate records of all transactions. It emphasizes that every receipt, invoice, and bill should be properly filed and indexed for easy retrieval. This not only helps in tracking expenses but also ensures compliance with tax regulations. The document provides a detailed guide on how to set up a filing system, including the use of folders, labels, and digital tools. It also highlights the benefits of regular audits and reconciliations to identify any discrepancies or errors in the accounts.

In the second part, the author explores various budgeting techniques and strategies. It covers the basics of creating a budget, such as identifying income sources and fixed expenses. The document offers practical tips on how to allocate funds effectively and make adjustments as needed. It also discusses the importance of monitoring progress and staying motivated throughout the process. The author shares personal experiences and lessons learned, providing readers with valuable insights into successful budgeting practices.

The third section focuses on investment and wealth management. It introduces different types of investment vehicles, such as stocks, bonds, and mutual funds, and explains their respective risks and returns. The document provides a step-by-step guide on how to research and select investments that align with one's financial goals and risk tolerance. It also discusses the importance of diversification and the role of professional advisors in making informed decisions. The author concludes by emphasizing the long-term nature of investing and the need for patience and discipline.

CASE STUDY: SCALING CULTURE TRANSFORMATION IN REMOTE TEAMS AT KPMG

The Challenge

In late 2019, KPMG launched a new set of organizational values meant to inform its management practices and business operations. The roll out of the associated cultural transformation efforts was stalled by the pandemic and had to be redesigned for a new reality.

Successful transformation efforts rely on the visible adoption of new values and behaviors by leaders and influencers. The shift to remote work created significant gaps in visibility, along with high levels of general uncertainty. To advance the cultural shift, **KPMG needed to support leaders in their efforts to build and maintain trust, create psychological safety, and role model values-aligned behavior for their remote teams.**

Our Work

We partnered with KPMG’s Chief Culture Officer to **design and deliver a targeted program to advance culture change** through the company’s cross-organizational Culture Champions Network in North America. This cohort of the company’s most engaged employees in North America included more than **100 key leaders across business lines, ranging from associate to partner.**

We developed a **skills-based curriculum** focused on KPMG’s cultural imperatives, integrating evidence-based practices from positive psychology and cognitive neuroscience. In addition to giving leaders **small, but mighty transformation tools** to advance their own efforts, we taught them how to **share these tools and highlight transformational stories through a train-the-trainer module.** The result was a **highly scalable intervention**, driven by an empowered group of cultural influencers.

PROGRAM OUTCOMES

20% increased confidence to role model values remotely

60% increased psychological safety

3x scaled impact in first month

Results That Drive Business Success

Following our program, **KPMG leaders showed huge increases in cultural transformation indicators:**

- Measures of **psychological safety increased 60%** and measures of **trust increased 25%**
- Leaders who felt confident in their **ability to role model KPMG values increased 20%**
- **Each leader passed on skills to an average of three team members in the first month alone**, creating exponential impact.
- One of the **most highly rated programs in KPMG history** with a **Net Promotor Score (NPS) of 72**

“Just a quick note to let you know how happy I am with the program. The pace, energy, content, and effort being put into this training shows how seriously KPMG is taking this program and how much they value us. Simply brilliant. Thank you and I’m thrilled to be a part of the team.”

Senior Manager, Compliance Practice

Why Us

We developed our *Leading by Example* program through original, empirical research into high-performing organizations. Our research at University of Pennsylvania has found that, in the post-pandemic world, the highest-impact leadership practices are the ones that **make work meaningful through contribution, community, and challenge**.

Our framework, honed through extensive work with Fortune 500 companies, focuses on the **highest-leverage interventions that leaders can use to succeed in the new environment of work**. It was designed specifically to **address the challenges of communication and role modeling in remote and hybrid work environments**, leveraging additional research from positive psychology, cognitive neuroscience, and organizational effectiveness.

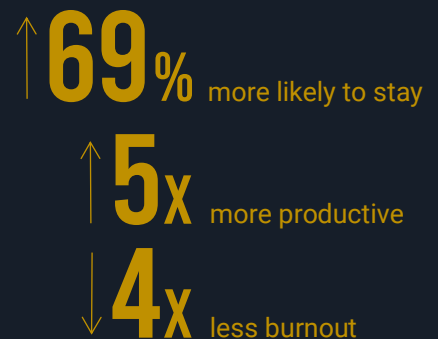
By combining our proprietary insights with the most up-to-date research on building effective leadership, we were uniquely positioned to craft an evidence-based program for KPMG leaders with long-tail impact on the output of their teams.

Program Highlights

Our *Leading by Example* program was designed to specifically **build people leader effectiveness remote and hybrid work environments**, leveraging the most up-to-date, scientific research from positive psychology, cognitive neuroscience, and organizational effectiveness:

- Skills to build Trust and Psychological Safety among hybrid teams
- Growth Mindset framework to maximize employee development and output
- Core leadership practices to increase Self-Awareness and model Integrity
- 3-Step framework for productive hybrid meetings
- Model for building trust through feedback

ROLE MODELS GET RESULTS



*"A big thank you to you and to our internal team who set up this amazing program. I've walked away from each session **feeling inspired and motivated**. This program really **shows how much the firm cares for its people** and has had a **huge positive impact on me and my work**. Big thanks!*

Managing Director, Advisory Practice

We leverage the science of high-performing organizations to achieve critical business results.

[Contact us](#) to learn more about how we can help your team thrive.



ABOUT WES

Wes works with high-performing companies to build organizational resilience, develop leadership capabilities, and deepen employee engagement through a meaningful work lens. He brings two decades of experience growing successful ventures and consulting for Fortune 500s, startups, and NGOs. Wes is a Master Facilitator for the Penn Resilience Program and has been a featured speaker at South by Southwest Interactive and the Nobel Peace Prize Forum, and his work has been covered by the New York Times, Forbes, Business Insider, Fast Company, and others.

In addition to being an expert on meaningful work, resilience, and leadership, Wes is passionate about social impact. He helped produce a documentary for HBO, *The Out List*, and a book highlighting leaders in sustainability space, *I Am EcoWarrior*. Wes is a graduate of Vanderbilt University and holds a Master's from University of Pennsylvania in Applied Positive Psychology.

ABOUT TAMARA

An accomplished trainer, consultant, and international speaker, Tamara leverages her expertise on productivity and meaningful work to help leaders create systems and cultures that enable their teams to thrive and their organizations to grow.

Based on her proprietary Peak Productivity Pyramid™ system, Tamara authored *The Secret to Peak Productivity*, which is distributed globally and has been translated into multiple languages. Her clients include Black Rock, KPMG, Microsoft, Google, and Best Buy, and her work has been featured in media including *Business Insider*, *Forbes*, *USA Today*, and *The Boston Globe*.

Tamara holds a Master's in Applied Positive Psychology from the University of Pennsylvania, where she is now an Instructor. She is a Master Facilitator for the Penn Resilience Program.



**MAKE WORK
MEANINGFUL**

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