



Culture Playbook



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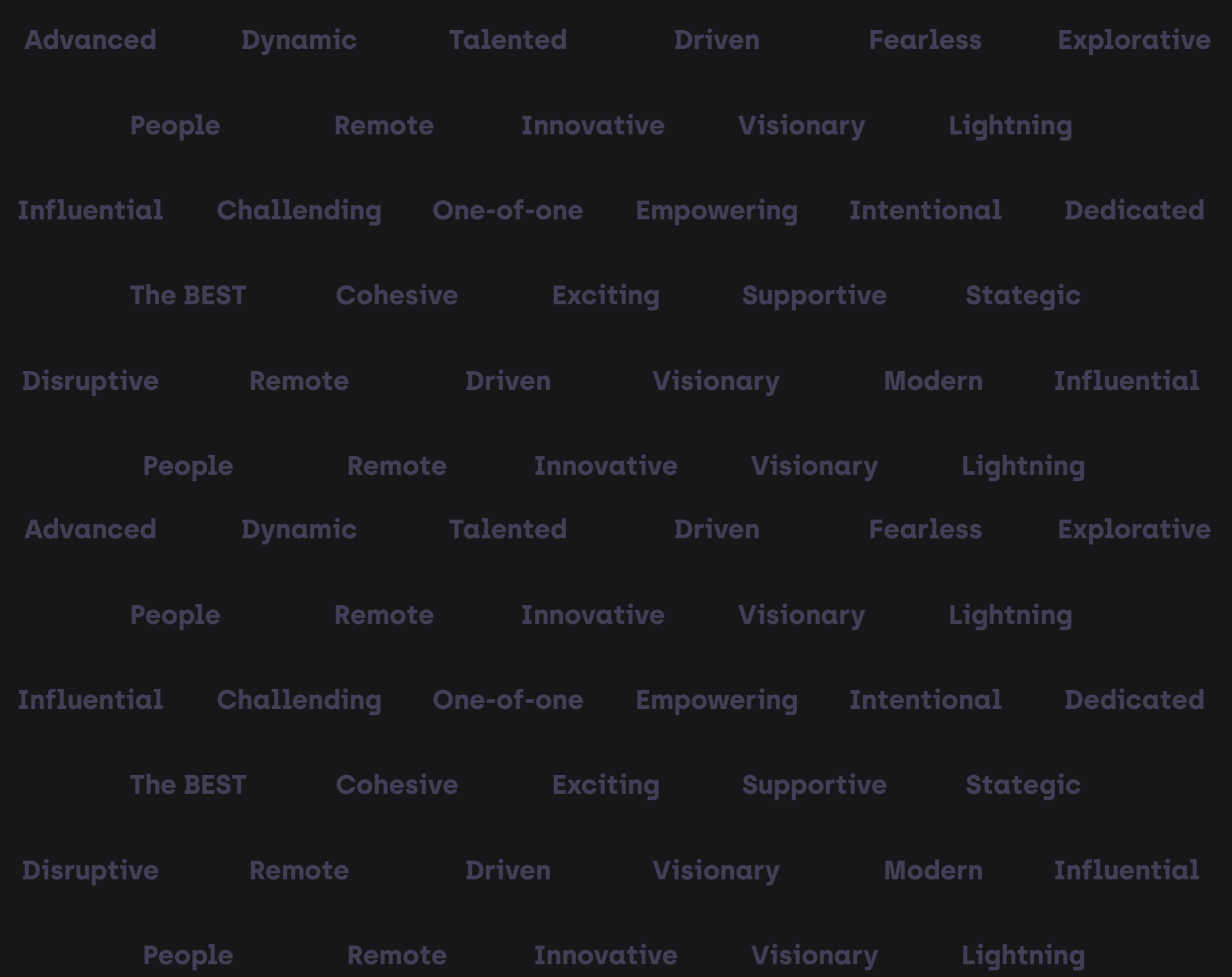
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Refine Labs is the industry-leading demand strategy and research firm fueled by execution at scale.

We help B2B SaaS companies dominate categories and uncover major growth opportunities by being the only firm that combines strategy, research, and specialized execution.

INTRODUCTION

Hey! Welcome to Refine Labs



Chris Walker
Chief Executive Officer

and are investing a lot of that in marketing and want to turn up the heat. That’s where we come in.

I started Refine Labs back in 2019 when I got tired of working at companies stuck on the lead gen hamster wheel. I knew there was a better, more disruptive way to drive ground-breaking results, yet no one would let me execute the vision I had at scale. I wanted to build a company where marketers like me could get off that hamster wheel and experiment with never-before-seen strategies without all the bureaucracy and institutional fear of the unknown. One of the biggest things that sets Refine Labs apart is how we measure marketing. In short, the fact that we measure it differently is what empowers more effective execution (and it’s more fun, too).

The execution side of the business uses Pipe™, our proprietary growth framework. This framework is optimized for dark social -

We are a research and strategy firm that delivers the most specialized, relevant, and actionable marketing insights because we actually execute these strategies with dozens of SaaS companies simultaneously. We work with high growth, high profile, B2B SaaS companies, usually Series C or beyond, who probably just raised \$100M

the social networks, content platforms, communities, and word of mouth channels where B2B discovery, research, and buying is actually happening. Our execution arm is the competitive moat that enables us to deliver a significantly better research and insights product in a differentiated way to **the current industry standard**. Our in-house research and insights product, **The Vault**, is the future of Refine Labs. With the Vault, we will achieve high margins, high valuation multiples, and much greater scalability than the professional services side of the business, helping us potentially uplevel hundreds of companies simultaneously.

We have spent the past three years building and scaling a highly effective & differentiated customer acquisition engine that will serve as a major long-term competitive advantage. This includes our **State of Demand Gen podcast**, currently a top 25 Marketing podcast in the US, as well as our scaled LinkedIn presence that includes dozens of employees posting thought-leadership content to drive consideration and top level business development.

I am so proud to have a team of the top demand, creative, and performance marketers in B2B, and it’s my mission to continue building a company that facilitates, catalyzes, and accelerates personal and professional growth among all employees. As CEO, one of the things that I am most proud of is the culture that has been built at Refine Labs, and I look forward to the contribution you will add as we work together to disrupt B2B SaaS marketing as we know it. Glad you are joining us on this ride - to the moon we go. 🚀



Sara Santos
Chief Financial Officer

We are so happy you are here! Refine Labs is a highly supportive environment where you will feel seen and heard in ways you never thought possible. We love to respectfully challenge one another and make each other better, because we are a team, above all else. My advice to you is to embrace failure in order to skyrocket your personal and professional growth at Refine Labs. Please feel free to reach out to me at any time as my door (slack, email, or phone) is always open!



Emily Ross
Chief Customer Officer

Welcome to the team! We are thrilled that you have made the decision to join us and I look forward to partnering with you. Whether it is your first week or first year, my door is always open and I would love to hear your feedback and ideas. My goal is to ensure we are providing a valuable strategic partnership to our customers while building a collaborative space for our Service Delivery team to do what they do best. Make sure to meet all of the wonderful people across different functions and let me know if there is anything I can do to help you get settled.



Cassidy Shield
Chief Growth Officer

INTRODUCTION

Overview

Refine Labs attracts, hires, and engages bar-raising talent. We empower the next wave of top marketing and creative talent to deliver never-before-seen revenue-generating solutions in service of our customers and their goals. We believe that the future of work means cultivating workplaces that empower employees to do the best work of their lives. That’s why Refine Labs is so much more than our value proposition. We strive to be a *talent destination* for extraordinary individuals to grow their skillset long-term and expand the trajectory of their careers. 📈

Our team is diverse, positive, supportive, highly talented, and collaborative - this is the number one thing all of our

employees say they love about working here (quickly followed by the accelerated learning opportunities and rapid business growth 😊). To that end, we design people operations, policies and programs that highlight and call forth *your very best*.

The goal of this text is to provide insight into the key “plays” we use to win and support each other as a team. We’ve taken great pride in partnering with our entire team to distill who we are and how we show up individually, on our teams, and in this company.

This Playbook is part handbook, part manifesto, and part self-help book - use it accordingly 😊.



Triana Mills
Creative Director

It is so refreshing to work with a company that encourages creativity and innovation. **In past companies, I felt that I was trapped in a box — I wasn’t allowed to try new things.** But here, I have the honor of working with people who believe in my ability to create solutions that help our customers. These solutions are not always conventional, but we never shy away from taking risks. If you’re looking for a place where you can be creative and also bring your own vision to life, look no further.

WORKING HERE

Party Fouls: “Oh Hell Naw!”

I’m sure you’ve heard of common sense—unfortunately, it’s not so common nowadays, hence this section. At Refine Labs we expect all employees to conduct themselves in a professional manner that is aligned with our core values, of which we will illuminate momentarily. For contrast’s sake, below are some quick examples of what plays and positions NOT to take - those vibe-killers that will get you the boot. 🍷

Of course this list is not all-inclusive, but you get the point:

- Sugarcoating aka bullshiting** - Say exactly what you mean, and mean exactly what you say.
- Keyboard gangster** - Don’t say anything via email or slack that you wouldn’t have the guts to say to someone’s face.
- Office politicians** - Gaining favor by flattering the boss, taking credit for others’ work, and sabotaging coworkers’ projects are just a few examples.
- Disrespectful behavior** - There is zero tolerance for yelling, lying, belittling, condescension, and/or biased attitudes or language at Refine Labs.
- Dishonesty** - Tell the truth, the whole truth, and nothing but the truth (raise your right hand).
- Excessive absences** - We have an open PTO policy but the work still needs to be completed on time so show up and get it done.
- Placing your interests over the team’s** - Team > Self; favor your team’s interest over your own.
- Not respecting work/life synergy** - Just say “no” to shaming individuals for taking time off, for setting boundaries or for prioritizing their mental and/or physical health.

To these behaviors, we adamantly, emphatically, and collectively say:

“Oh Hell Naw!!” 🚫🔪🔥

Now that we've gotten that out of the way 🧹, let's talk about the good stuff.

WORKING HERE

Core Values & Commitments

At Refine Labs, we deeply believe that **People Success = Customer Success = Company Success**, and all that we do is guided and informed by our core values and commitments. To start, we consider the following values to be our internal North Star ⭐ :

- ✖ **Be a Multiplier:** Together we are greater than the sum of our parts. We enthusiastically support, respectfully challenge, and wholeheartedly encourage each other to do the best work of our lives, each and every day.
- 💪 **Strength in Diversity:** We value our differences and commit to creating an inclusive environment that fuels our unfair competitive advantage.
- 😊 **Embrace Failure:** We either succeed or learn. Take risks, try big ideas, and embrace uncertainty.
- ⚾ **Play the Long Game:** We think and act in service of our strategic long-term company vision.
- 📈 **Growth Mindset:** We are energized by the endless pursuit of personal and professional development to better ourselves, each other, and our customers.

Those values supplement the following commitments that we have upheld, refined, and iterated since our inception 💎 :

1. Diversity. Equity. Inclusion. Belonging.

They're more than just words for us. They're the core principles that guide how we build our teams, cultivate leaders and create a company that's the right fit for everyone. Our work has to be internal first, so it can impact what we do externally. The more diverse individuals, thought processes and lived experiences we have on our team, the more unique perspectives and bright ideas we share.

Here's how we keep this commitment top of mind:

- Monthly DE&I audit and presentation of information at staff meetings
- Engaging with consideration and authenticity - the team's lived experience is the only measurement and expertise that matters
- Developing Employee Resource Groups (ERGs) to foster connection and collaboration among team members - we currently have a #WorkingParents specific Slack channel.



Allison Loehman
Vice President of
Demand Generation

In my first 90 days at Refine Labs, I up-leveled more skills and delivered more results than I did in three years at my previous company.

Refine Labs is creating the next wave of CMOs by giving Directors complex and interesting books of business, expert-level Performance Marketing partners, and free reign to run the best Demand Generation playbook in B2B right now.



Nate Page
Marketing Analytics Manager

The Refine Labs ethos of “*we are a team, how will we tackle this challenge*” has been great for my development, along with the autonomy and flexibility. **Although we are remote, I feel connected, accepted, valued, and have a sense of belonging.**

2. Keeping it ¹⁰⁰

Let’s keep it real - here at Refine Labs we are a team, not a family. We prefer not to obscure the sense of reality between employees and leadership by using the false “forever promise” that the term “family” may evoke - because that isn’t helpful for anyone. At the end of the day, the terms of service are clear - this is a contractual relationship which requires accountability, effectiveness, efficiency, and a commitment to excellence. We are creating a very special team dynamic that requires everyone to be aligned to our core values and aim to practice them every day, no matter what. Refine Labs understands that employees want boundaries, not “family”.

Here’s how we support ongoing professional development in your role:

- Quarterly feedback loops with your manager and peers so you will be well-aware of your strengths and opportunities for growth in your role
- Weekly Brain Shares to facilitate collaboration and efficiency
- Fostering a culture of team, not talent -By team, we mean a culture of trust and vulnerability where you can safely express your strengths and weaknesses, and ask for support without fear of retaliation.

3. Psychological Safety 🧠

Psychological safety is the belief that you won’t be punished or humiliated for speaking up with ideas, questions, concerns, or

mistakes. At Refine Labs in particular, it’s a shared belief held by all employees of Refine Labs that team members will never embarrass, reject, or punish you for speaking up - EVER! In the words of Brene Brown, we “*exercise the compassion that comes from knowing that we are all made of strength and struggle.*”

Our Leadership Team creates a safe environment by doing the following on a regular basis:

- We don’t allow our clients to be disrespectful to our employees - we uphold our standards and values internally and externally.
- Leading with empathy, not ego - We 100% skip the passive-aggressive and manipulative bullshit behavior (yep; we said it!).
- During team meetings and one-on-one sessions, we actively create an environment for you to feel safe to exchange ideas by asking questions, giving and receiving feedback, and making mistakes.
- We understand that speaking up and respectfully challenging the status quo only helps us improve and change-that’s why we regularly solicit feedback from our employees through everything from personal calls to check-in to quarterly engagement surveys.
- Instead of “need-to-know” access, we share publicly on a regular basis. This includes financial statements and DE&I metrics, among other details.

Employee Benefits & Experience

Inclusive. Transparent. Cohesive. Freedom. These are all words that our employees have shared with us to encapsulate what the culture at Refine Labs feels like. We trust you to meet deadlines, prioritize, and communicate accordingly, and we don't feel the need to surveil you or engage in other sorts of distrustful behaviors that are common with so many employers. As humans writing this book, we know that you are human as well. We value your health, time, and dignity as much as you do (perhaps even more!), so we have facilitated several internal initiatives to not just talk about how we support you - we want to tangibly show it to you as well!

Health 🧘

We want to provide a realistic preview into benefits at Refine Labs. The [benefits preview tool](#) gives transparency into potential monthly out-of-pocket costs towards Medical, Dental, Vision, Life, and Disability coverage, with options customizable by location. In addition, Refine Labs offers an Employee Assistance Program (EAP), Federal Savings Account (FSA) and discounted services through Teladoc for virtual visits for employees and family members.

Expectant Families 🍼

We want our employees to take the necessary time to care for themselves and new additions to their families. We understand a new child requires focused time (and unfortunately sleepless nights) for the employee and their family and we aim to support that transition. An impactful benefit to an expectant

parent offered by Refine Labs is the utilization of [Parentaly](#) services in preparation for leave. This service aims to make work and family life more manageable, which means parents can focus on career growth. From pre-leave planning to return-to-work re-onboarding, this service provides content and coaching to make parental leave less stressful. This benefit is 100% fully paid for by Refine Labs.

Unlimited PTO & Flexible Work Environment 🗓️

We want you to feel comfortable taking time off and leveraging our flexible work environment, so we put together this handy list to remind you how we roll at Refine:

1. Minimum time off. Everyone should take a minimum of 7 days every 6 months - Get off your computer and go do something fun with your family and friends!
2. "No questions asked." You don't need to tell us why you need time off, that's none of our business.
3. We have flexible work schedules. Ensure you meet your commitments for deliverables but work when you want to - block off your calendar when you are not available.
4. Holiday time. Everyone gets the week off between Christmas & New Years in addition to our standard company holiday calendar [13 days total including adding the extra days between Christmas & NYE].
5. "No Meeting Fridays." No Zooms, no client calls, spend time catching up or take the day depending on what is going on.

6. Make the most of summer months and enjoy every other Friday between Memorial Day and Labor Day off!
7. Sick days. Don't work when you are sick, let your manager know, and they can cover for you.
8. Mental health days. These are just as important as "sick days". if you are physically ill - you don't need to tell us why you need a day off.

With a team from coast to coast and across various continents, we have flexible hours to accommodate different time zones. We also embrace asynchronous communication as much as possible to cut down on unnecessary meetings. As much as we love face-to-face meetings, we know video fatigue is real. That's why all of our employees have the option to be video-free at any time. The hours you put in are secondary to the results of the work. At Refine Labs you will always be treated like an adult, and *never* micromanaged.

Strategic Compensation 🏆

Don't you prefer a strong base salary over the pie in the sky possibility of maybe earning a bonus months down the line? We sure do! Research has shown that annualized rewards hijack creativity. Bonuses encourage employees to focus on their individual targets, instead of being open to taking a risk and trying something new. We don't want that energy here. Our compensation program is designed to meet the following key objectives:

- **Internal Comparability:** Ensure similar jobs are paid equitably across the organization.

- **External Competitiveness:** Reflect pay rates for comparable jobs within the relevant labor market.
- **Flexibility:** Support a diverse, inclusive and distributed workforce to accommodate differences and changes in job requirements, job market and economic conditions.

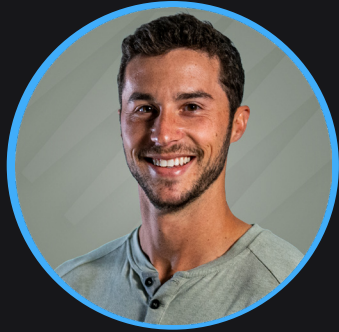
Birthday Leave 🎂

We believe in celebrating milestones, this includes employee birthdays! Skip the guilt and take the day! Refine Labs expects you to celebrate in whatever way you want - cake, ice cream, sleep in, party like a rockstar - just no logging in for work. Don't worry if your birthday falls on a weekend or holiday, take that Friday or Monday off, whatever works best for you.



Christian Williams
Director of Paid Media

“The Refine Labs team is the ‘A-team’ - everyone here is smart -absolute geniuses in what they do. **If you want to thrive as an innovator, instead of doing things how they’ve always been done, you should come work at Refine Labs** and change the way marketing is done for B2Bs.”



Sam Kuehnle

Vice President of Demand Generation

This is the way it’s always been done and will continue to be done’- you will never hear this on our team. **Business and marketing are constantly changing, and our team is constantly empowered and encouraged to seek out new and better ways of doing things.** We’re rewriting the B2B marketing playbook and creating the next wave of marketing leaders.

Refine Labs is compensating you for future potential, not past performance. We value creativity from high performing employees within a culture of innovation, so implementing bonuses does not fit with our culture. Further, we believe in hiring the most qualified candidate - physical location is not a factor in our decision making processes around compensation.

Leadership 🗑️

Leaders-how many of us *actually* have them? Understanding the difference between a manager and leader is important. We understand it this way: leaders have employees follow them while managers have employees who work for them. At Refine Labs we require all leaders to showcase the following key characteristics:

1. **Honesty & Integrity:** We believe and buy into the journey of our team members
2. **Vision:** We know where we are, where we want to go and we involve our teams in charting the path forward
3. **Inspiration:** Each employee should understand how their day-to-day actions tie into the bigger company picture
4. **Ability to Challenge:** We encourage employees to challenge the status quo - it’s part of psychological safety
5. **Communication Skills:** We keep our teams informed of the journey and share any roadblocks we may encounter along the way

So...what’s the catch? 🙄

Refine Labs is an incredible place to work, we aren’t gonna lie. With this exciting, high-growth, start-up environment comes some inevitable realities we’d be remiss if we did not share.

For instance, we move *FAST*. One week here can feel like three, because we are constantly hiring new people and securing new business and the way things operated last week may completely change the next. Sometimes doing legendary work can feel like chaos.

We have great benefits (did someone say \$75K minimum salary?), but we wholeheartedly acknowledge that in order to continue retaining the best talent in the game, we need to be constantly looking for ways to make our benefits more competitive and increase the value they bring to our employees. Trust us, we are working on it.

We are generally a highly positive crop of people (which isn’t a bad thing, right?), but it can also feel overwhelming to experience such a flood of high-energy. Know that you can bring the fullest expression of yourself to Refine Labs, even if it feels different from what you may *think* will be accepted. We believe that our heterogeneity (even emotionally) fuels our competitive advantage, so get on over here and teach us a thing or two about the full range of human expression.

Last, but certainly not least, working here you *will* feel imposter syndrome from time-to-time. It’s inevitable. You are working with the best minds in B2B marketing and creative — it feels like everyone has their own podcast (or is a regular guest on one), *thousands* of followers on LinkedIn, totally wicked playbooks - you know the deal. It will feel like you don’t belong. But trust us - if you made it through our interview process and we hired you, *you DO*. We have high expectations at Refine Labs, but know that you have a team of greatness behind you that believes in you and the inherent value we know you bring to the company. We believe that iron sharpens iron, and, in our humble opinion, you’re iron too!



Maria Finelli

Lead Graphic Designer

Having the freedom to change my scenery when I feel I need to helps me stay inspired and keeps my creative ideas sharp and fresh. I really value that trust because if I’m getting stuck creatively, I’m able to take a walk or find a new spot to work from and I’ll have that creative spark again.

It’s refreshing to know that our leaders understand we need to be able to recharge and reset to produce our best work. Taking time off shouldn’t have a stigma attached to it and it’s amazing to know it doesn’t at Refine Labs.



Jessica Williams
Vice President of People

I'd like to welcome you to Refine Labs. We are excited that you are considering or have joined this innovative organization during our rapid growth phase. I trust that you will find this Culture Playbook as a beneficial guide to understand the employee experience and culture that we are building. **Please don't hesitate to contact me with any questions; my main goal as the Vice President of People is to make sure employees are top of mind in all leadership decisions.** I'm looking forward to your success. Here's to a wonderful partnership together at Refine Labs!



Megan Bowen
Chief Operating Officer

We are so glad you have joined us on this journey! In every decision we make and action we take, we strive to ensure we prioritize the well being and professional growth of the team, drive successful results for our customers and continue to build a sustainable business that is changing the way B2B companies execute marketing. **My sincere wish is that as you settle into your new role here and get to know the team, you feel accepted, respected and empowered to do the best work of your life.** Now that you are here, we are excited to hear your feedback and new ideas so we can continue to evolve and enhance the experience of being part of the Refine Labs team.

WORKING HERE

Talent Destination Manifesto

We've said it once, and we will say it again - the future of work is creating talent destinations to attract and empower employees to do the best work of their lives. To that end, we have designed Refine Labs to be a place:

- ✓ Where you can show up as your **true self** (whatever that means to you!) and **feel accepted** for who you are
- ✓ Where you feel safe to **express your opinion** and engage in **respectful disagreement**
- ✓ Where your **well being** is prioritized and you are given **flexibility** in when and how you work
- ✓ With a **vision for the future** that is different, **unique**, compelling and important
- ✓ With a long-term mindset and **unwillingness to sacrifice integrity, honesty and respect** to get ahead
- ✓ Where you are **provided the time and space** to be creative, explore and try new things
- ✓ With **clear expectations, regular feedback and accountability** that challenges you to grow
- ✓ Where you are **surrounded by diverse, intelligent, driven people** you can constantly learn from
- ✓ Where you are **appreciated, recognized and rewarded** for a job well done
- ✓ That makes you a **better person, practitioner, and leader** that wants to pay it forward to help others

In case it wasn't clear before, Refine Labs is that tropical destination! 🌴

So come on in - the water's juusst fine. 😎

