



The Montilla Way

The Montilla name has served different industries in different languages and countries across three different generations. So, what could possibly bind these different companies together? What makes them one of the same is the philosophy held by each of the Montilla ladies. Here is the first attempt to put into words our way of doing business – the cornerstone of our collective business model and what sets us miles apart from the rest.

Deliver perfection...or don't deliver anything. By the time we present our work to a client, we have triple checked it for accuracy and we stand by our numbers and behind the job we have done, without wavering. This often means that planning, organizing, and data prep stages take 80% of our project time – and that's okay. Speed is great but accuracy is better.

Excuses are for losers. Whatever is your part of the plan or project, own it completely. Follow through and find a way to get the ball back in your court when it's not. Don't abandon progress or make excuses for delays.

Decision-making support is our product. We aren't the star of the show...but we certainly do help our stars shine! We work hard behind the scenes so that our clients can run their businesses with confidence and mastery. We fully understand our clients' business model and reflect that in our reporting. Ideas and recommendations are always informed by our personal understanding of the entrepreneur's journey and admiration for business ownership.

If it's not right, then it's not done. If our teammate drops a ball, we pick it right up and come to our teammate's rescue. Do whatever it takes to get the job done and look collectively great in front of the client. We don't ever throw our teammate under the bus in front of a client. We don't always get things right, and when that happens, we use the misstep or misunderstanding as an opportunity to get it right and to reassure our clients that we are dedicated to making them happy.

Cash is not king. We are oriented by passion, not profit. Money is a byproduct of our hard-earned work, from the hours we spend celebrating, deliberating, sculpting, and creating. We put our work at the center and never let delays in (or lack of) payment get in the way of this dedication. We prioritize our work by

deadlines and client needs, not by incoming payment. Profit-first companies are a dime a dozen, this is not one of them.

Always give your best. You get the best from your team, so you give the best of yourself. Life is too short to be mediocre. If there is something external that is not allowing you to work to your best ability, leave the office and take care of that thing. Family comes first. If you need to leave your post, tell us where you left off and rest assured that we have your back.

Trust your judgment, have an opinion...and share that opinion with your client. Don't withhold your opinion or your judgment in an effort to present only the numbers or the cold, hard facts. Make your argument compelling by backing it up with strong data. You have good taste, you know your stuff, you were taught by the best. Clients come to you because they need your opinion and judgment, not just a product, a deal, a dress, or a set of reports. They want to know they are going about things the *right* way, setting the *right* KPIs, wearing a piece with a touch of class. In fact, if they are worried about the end product above all else, then they are not the right client for us. Though we do love bookkeeping and understand its foundational nature and value for analysis, we are primarily analysts with our eye always set on strategy and the success of the client company.

Integrity in your work ethic. Love what you do. Sounds trite, but it's not. You are on this team because you've got fire in the belly, a spring in your step, and you hold yourself to high standards. Work with excitement, accountability, and integrity. If you don't wake up wanting to get to work, then it's time to think about what would.

Own your work. Take initiative and run with your ideas. Call meetings. Circulate agendas ahead of time and summarize outcomes and action items within 24 hours of meeting. Keep meetings to half an hour or less wherever possible. It shows that you value your time and the time of others.

Never stop learning. Whether it's a new offering or piece of technology to upgrade current offerings, a certification or cool new tool, nothing learned goes to waste. Share with your team what you've learned, your ideas, and efficiencies you've developed.

