

A practical guide  
to how we work  
and win together

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# By:default



The Good Ship Dovetail



# **01 A letter from Benjamin**

# **14 Mission and vision**

# **16 What we value**

Put the customer first

Do the thing

If we do it, we nail it

Stay humble

Open by default

# **42 How we work**

Relationship over process

A writing and reading culture

The captains model

Making clear requests

Meeting types and norms

No standing 1:1s

How we present

How we give feedback

# **60 How you grow here**

What it looks like at different levels

# **64 Intentional design**



# A letter from Benjamin

Before I started Dovetail I worked as a product designer at a company called Atlassian.



**Every day, across every company in the world, teams like the one I worked on would make decisions about what to build, what to change, and what to stop doing.**

Many of those decisions were driven by instinct, internal politics, untested strategy, or what the loudest person said—and we were no different.

As a designer I felt that deeply understanding customer and user needs was the best way to help us build the best product. While customers sometimes explicitly requested we build certain features, I found the most useful insights came through implicit “voice of customer” data: reading through support tickets; poring through NPS survey responses; and talking to our sales and customer success teams in the United States.

We also visited customers at their office from time-to-time and this was also very insightful. I remember very clearly my first customer visit. I sat near someone's desk and watched over their shoulder as they created a ticket in Jira. A dialog appeared with dozens of mandatory fields and I watched as they slowly filled out each field one-by-one. I instantly had many ideas on how we could improve this experience ranging from more automation to better default field settings.

A lot of the time customers don't know what they want or can't describe the best solution. There's an apocryphal quote that is often incorrectly attributed to Henry Ford:

**"if I had asked people what they wanted, they would have said they wanted a faster horse."**

For me, observing users, identifying patterns, behaviors, and insights, and conducting research was a core part of good design.

Another influence on me was watching my mum use products. There's no faster way to expose poor design than watching someone who didn't grow up with today's technology try to use it. As a designer, I found it frustrating to see her struggle with problems that could have been avoided through better user research and more thoughtful design. I couldn't help but blame the designer, not the user. Over time, I realized this wasn't just true of software—I saw the same issues in everything from kitchen appliances to car controls.

I formed the view  
that if I could help  
product teams  
make their own



The feeling of improving  
product experiences at scale.

products  
better,  
that was  
a surefire

way to improve  
the everyday  
experience for  
billions of people  
around the world,  
just like her.

Improve the quality  
of every thing.

Determined to be a better designer by leveraging insights from everywhere, I quickly ran into numerous challenges. In businesses, data is siloed in different systems owned by different teams. Due to this and other constraints (like seat-based licensing restricting access to tools to paying users only), it was practically impossible for me to get access to say, support tickets or sales conversations at a company as big as Atlassian. I did manage to get access to SurveyMonkey which is what we were using for NPS surveys at the time, but otherwise didn't have a lot of luck.

**There was a political aspect too: some teams and managers took the saying "knowledge is power" literally and didn't allow others like me to access their knowledge, 'gatekeeping' access to data. Even if I did get my hands on some data, in the mid 2010s there was no way to quickly and easily make sense of qualitative information like text, images, videos, and documents other than going through the content line-by-line.**

Even if you had the time to do this, the best tools were either a spreadsheet or complicated academic software. There's actually a whole category of academic software called Computer-Assisted Qualitative Data Analysis Software (CAQDAS for short) which you can look up on Wikipedia. It's very clunky and awkward.

Looking to what was more within my control, I started doing more user research in the form of customer interviews and usability testing. This allowed me to run my own studies and collect my own data, avoiding the problem of inaccessible “voice of customer” data across the organization. Here the challenges were also numerous. It was difficult to find the right people to speak with in the first place as a lot of the time you’re looking for a very specific type of person or someone in a specific role. In my case I needed people who were Atlassian customers or users. When I did manage to speak to them, there was no automation like there is today in the form of video recording, AI transcription, and so on, so I had someone on my team take notes by hand during the session and analyzed the notes on a physical whiteboard with sticky notes and string. I felt like a detective investigating a serial killer.



Detectives at work.

At the same time, productivity and collaboration software was improving rapidly around me. Tools like Sketch (and then Figma) modernized interface design by moving us from bitmap to vector-based formats and making design more collaborative; WYSIWYG rich text editors became more modern with Dropbox Paper leading the way followed by tools like Quip and Notion. Slack, Trello, Dropbox, GitHub, and the Google Suite drove a trend called the “consumerization of enterprise software” by introducing modern visual design, familiar interface patterns from consumer products, and fun, branded micro-interactions and animations. Yet with all of this advancement in software for designers, product managers, engineers, and marketing teams, I still felt the problem of leveraging customer insights (both implicit and explicit) remained unsolved as all of the challenges above were still present.

When I felt ready to take the leap and start my own startup, this general problem of customer insights is what I decided to try and solve. I've never really been interested in doing things in half measures. I figured that if I were going to go through the painful journey of starting my own company, it should be a company that had a meaningful impact.



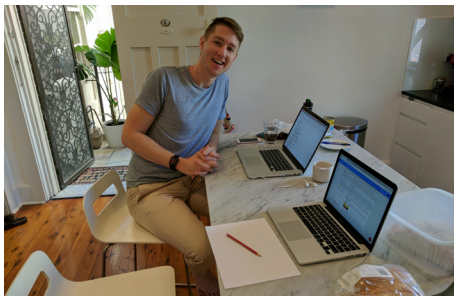
We did it!

**I set an ambitious  
company mission,  
to improve the  
quality of every  
thing**

The early days at  
276 Devonshire St,  
Surry Hills



**as that is reflective  
of the outcome  
Dovetail would  
drive for the world.**



Brad, my co-founder, and I began with a focus on user research because it was the easiest category of customer insights to solve for with software at the time. User researchers are an underserved niche role and therefore more willing to embrace new tools and vendors. Compared with voice of customer data like support tickets or NPS responses, a typical user research project would have less than 30 interviews or sessions, making it manageable to manually analyze, so it suited the technology available at the time. There is actually a famous article from Jakob Nielsen from 2000 called *Why You Only Need to Test with 5 Users*—user research data is relatively low volume. Research data was easier to come by at the time as end users would simply upload research data to Dovetail from their computer. This was easier than building dozens of integrations with all of the tools where voice of customer data resided.

**While we started with user research, the goal was never to end up there: our mission has always been “improve the quality of every thing”, not “improve the quality of user research.”**

As I said earlier, there is immense value in the implicit customer insights that can be found in customer and user touch points beyond user research. User research insights are just one slice of the pie for teams and executives who look at multiple data sources and signals to arrive at a strategy, roadmap, or product decision. The challenge is that all of this other data is often inaccessible and difficult to make sense of at scale.

Now with Large Language Models (LLMs), we can summarize, analyze, and synthesize large qualitative data sets with relative ease. Since ChatGPT launched at the end of 2022, we have found more and more ways to leverage AI to help our customers make sense of their customer insights.

**For Dovetail, the conversation has moved beyond “this isn’t possible with technology today”. It’s becoming increasingly possible for us to solve our customers’ problems and achieve our mission.**

One of the new products we built to do this was Channels, designed specifically for high-volume and continuous voice of customer data like support tickets, reviews, NPS responses, etc. There was much debate at the time about whether we should build a new technology stack and user interface for this use case or try to modify the existing 'projects' tech stack and interface that we had to satisfy this use case. We did a lot of research, talked to a lot of customers, spiked different options, and looked at competitors, and decided to build something new.

The 'voice of customer' use case has a very different set of requirements than user research: voice of customer data is a continuous stream, not a one-off project; voice of customer data is high-volume with thousands of data points, not low-volume with dozens; voice of customer data is immutable (a customer review shouldn't be edited), not mutable (a transcript may need to be tidied up); automated integrations are critical, not optional. As a result, the architecture, tech stack, data processing pipeline, feature set, and user interface requirements are all quite different than what we had for 'projects'. For this reason we built something new and I think that was the right decision as it allows us to provide more tailored experiences for different types of data, use cases, and end-user personas.

These days, we continue to improve our product for our core use case of centralizing and making sense of data from Experience Research projects. We're iterating on our Channels product to nail Voice of Customer data. And we're setting our sights on entirely new sources of insights and use cases like Revenue Intelligence (sales and customer success calls) and Consumer Insights (social media, public reviews, forum posts, community groups, and competitor and brand tracking).

All of this is in service of our mission to improve the quality of every thing.

**We believe  
the best teams  
listen to their  
😊 customers,  
and customer  
insights are  
everywhere.**

But it's also a growth strategy for us to grow the business and expand our customer accounts. The idea is simple: if we start with one problem and over time solve more problems for customers—more data types, more teams, more use cases—we increase the value of Dovetail and therefore lift the Average Contract Value (ACV) of each customer account. How much you can charge a customer is a function of how much value you add.

This idea of landing with one use case in one team in an organization and expanding to more teams and use cases has been our consistent strategy over the years. We call it *'land and expand'*. We continue to find new ways that organizations want to leverage customer insights in their product development process and strategic decision-making. The latest is using insights as rich context to feed into agentic coding. As we keep learning about these new customer problems, ideas, use cases, and how to leverage new technology, we will continue helping teams listen to their customers, and continue making progress towards our mission of helping those teams improve the quality of every thing.

AI is changing lots of businesses, ours included. Over the years we've had numerous challenges to overcome including new technology like AI. But we've also faced new competitors, new scaling issues, new culture issues, and so on. Technology, competitors, people, customers, investors, politics come and go and are constantly changing and evolving. Many of the challenges we've faced as a business would have broken other companies.

Dovetail has continued to 'sail on' through both calm and rough waters because Brad and I, the management team, and the team at large have invested a lot of intentional time and thought into building a resilient culture that can continue in spite of constant change. It's our culture that allows us to succeed even when everything else is in flux. This is not by accident—it is an intentional investment in a set of values, rules, norms, and style that is prescribed to everyone at Dovetail, widely understood and memorized, and consistently reinforced as an expectation so we're all on the same page.

Touching grass at  
Terrigal NSW 2025



This handbook is an attempt to clearly describe these values, rules, norms, and working style. A lot of thought and work has gone into it, so please take the time to read it with equal care. Understanding the content in this handbook will make a huge difference to your time at Dovetail.

# Mission and vision

Dovetail  
exists  
to improve  
the quality  
of every  
thing.



**We believe great things are made by teams who listen to their customers. We build the software that helps teams everywhere do exactly that.**

The way organizations collect and use customer feedback is broken and the scale of the problem is growing. Businesses interact with customers across an ever-expanding surface area: user research, sales calls, support tickets, NPS/CSAT surveys, in-app feedback, social listening, and more. But almost universally, the data from those interactions ends up siloed across inaccessible tools, locked in the heads of individuals, or buried in spreadsheets and presentations. The result is that organizations are simultaneously drowning in customer data, yet starving for customer understanding.

AI has made it possible, for the first time, to automatically process, synthesize, and surface meaning from large and disparate volumes of unstructured, qualitative feedback. At the same time, organizations are under mounting pressure to move faster, prioritize better, and align their teams around a shared view of what customers actually need. These two forces together—the AI capability shift and the organizational intelligence imperative—create a category-defining opportunity for Dovetail.

The opportunity is huge and the stakes are high. It's ours to lose.

# What we value

# Dovetail has five values.

1 **Put the  
customer first.**

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2 **Do the thing.**

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3 **If we do it,  
we nail it.**

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4 **Stay humble.**

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5 **Open by default.**

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They are not words on a wall. They are a decision-making framework. When a hard call comes up, pressure-testing it against the values usually makes the answer obvious.

**When a bad decision gets made, it is almost always because someone tested it against the wrong criteria.**

These values were written down in 2021, when the business was four years old. They describe Dovetail as it actually is rather than as anyone wished it to be and they have held up since. Our values have been immensely helpful in guiding our decision-making for over five years.

**We are extremely proud of our values because they aren't just aspirational—they're practical. We rely on them in almost everything we do.**

# What does Cheri have to say?



Cheri March  
Product Manager  
Values Champion

**Living the Dovetail values isn't something I think about as a separate exercise, it's more like an OS behind *every* decision I make.**

Put the customer first is the value I feel most strongly about. It's not a principle I adopted, it's something I carry from every deal I've closed, every hard sales conversation, every failed demo where the product broke, every churned customer. When my team ships something now, I don't just think about whether it works. I think about the person on the other side who's going to open it and decide in thirty seconds whether it respects their time and money. I think about our go-to-market team (marketing, sales, customer success) demoing this and being proud of it.

You have to do the thing. I'm allergic to roadmaps that sit in slides. The best example I can give is Chat v2. New features shipping every other day, running live in our own workspace so we could dogfood everything before it hit customers, A/B testing as we went—half of self serve getting the new platform in real time while we kept enterprise customers shielded. Not because we weren't confident, but because real world data from real users beats a staging environment every time, and if something broke we could contain it. We moved fast, stayed lower risk, and got signal we could actually act on.

If the right tool doesn't exist, hack something together. If the process isn't perfect, work around it.

**Conditions  
are never ideal  
and waiting for  
*stars to align* is  
a fool's game.**

Recently, Marketing needed PM insight for a social post on the fly. Instead of racking my brain, I queried our own sales call data in Dovetail—pulled five real customer quotes, formatted them as punchy hooks, dropped them in the thread in minutes. The post used a line from that output. That's the version of this value I'm most interested in right now: using the tools we're building to move faster across functions, not just in my own lane.

That sales lyfe is what keeps me honest. It's easy to get confident when you're moving fast and updating a changelog every day. But when you've had customers tell you to your face that you missed the mark, and they're buying a competitor instead, you stay humble.

If we do it, we nail it challenges me most because it sits in direct tension with speed, and I tend to lean more towards speed... but they're not opposites. I bring this into my workflows daily by remembering just one thing: the first time someone encounters my work—a doc, a feature, a slack reply, an email—

# I want it to feel like I give a shit.

Open by default can be a hairy one for the faint of heart. I'll openly question a VP if I think they're wrong. I work in public channels, not DMs. I share rough thinking early and trust the team to make it better. But openness only works if you pair it with assuming good intent. We're all people, doing our best, in imperfect conditions. Dovetail does not hire dickheads. That assumption is what makes it safe rather than adversarial.

Maybe it's the Queenslander in me, but I try not to take myself too seriously through any of it. I've argued passionately about button placement, been poring over usage metrics at 11PM, and lost sleep over launch timelines. But we're not saving lives. Keeping a bit of irreverence in the mix is what stops me from becoming insufferable and keeps me focused on what actually matters—building things people want to use and having fun while we do it!

# Value 1/5

## Put the customer first

Seek to understand—and then solve—real customer problems. Earn and keep customer love through transparency, authenticity, and results. Watch competitors, but obsess over customers.

Every significant decision at Dovetail runs through one filter: does this put the customer first? Not what we assume. What we have heard, watched, and seen in the data.

This applies to every team, not only customer-facing ones. Everyone at Dovetail has a customer. For product, design, and engineering it's the people using Dovetail. For sales and success it's the accounts they work. For operations, people, and finance it's often other Dovetailers: the internal teams they serve. For the talent team, it's candidates. The craft is the same regardless: figure out who your customer is, do the work to understand what they actually need, and build from there.

Put the customer first is also a useful value in that it keeps us grounded in why we're here. Too often, as businesses grow, they become internally-focused. Serving customers well takes a backseat to internal meetings, politics, and bureaucratic processes like unproductive meetings and promotion panels.

Finally, put the customer first helps us make the right decision when we have a complex tradeoff between the needs of the business and the needs of our customers. Sometimes these are in tension, and this value reminds us that the customers come first—because they pay the bills.

# What does Charles have to say?

Charles Durieux  
Software Engineer  
Values winner  
Put the customer first



**At Dovetail, we strive for quality—we're building a great product we want our customers to love.**

But what happens when something goes wrong or when our product doesn't meet their needs?

They come to support, support comes to product, product comes to engineering. From that point, two things can happen: either we're in it with the customer doing everything we can to help, or we're simply not, and they feel on their own, abandoned. These are technical problems to solve, but they need a human response.

Every time someone comes to the platform team for help, I remind myself to match their urgency, and put myself in the customer's shoes. Working after-hours to fix an issue because a customer has an important meeting tomorrow and they need the feature working, is a no-brainer. This is what put the customer first means to me.

**It's the opportunity to have our customers start their day with a message from the team saying their problem is resolved. It's about the relief and satisfaction they feel in that moment, and throughout the week ahead.**

This might be the reason our customers stay loyal, because we cared enough to go that little bit further. Because we put them first.

This happens multiple times every day. People come to us when something's broken, when they're blocked, or when they need to move. When the workload is heavy, prioritization can be hard, but when you get it right, it's better for everyone. We're enabling people to do their work, so if I don't show up, I might be the bottleneck. In turn when customers are frustrated, everyone feels it. It's a constant feedback loop that we're all a part of.

It's not always easy, it often feels like we're all at full capacity, and everyone's issues are important to them. We're not trying to be perfect. We're trying to put ourselves in our customers' shoes so we don't forget that there's a human at the other end of it. Because at the end of the day, we're all each other's customers.

# Value 2/5

## Do the thing

Keep the speed up by taking pragmatic risks. Only agonize over irreversible decisions. Be reliable and follow through. If you say you'll do something, do it. If you're off track, communicate.

This value is an invitation to take ownership. If you see an opportunity at Dovetail and you're passionate about it, you have the authority to work on it. You do not need a manager to tell you to start and you do not need consensus before you move. Pragmatic risks are expected. Agonize only over decisions that are genuinely irreversible—everything else can be tried, learned from, and changed. Decisions tend to come in two forms: one-way doors and two-way doors. Most decisions are two-way doors. This means you can always change your mind later. For now, just do something, and we will iterate as necessary.

Ownership runs both ways. When the outcome is good, share the credit with the people who helped. When it's bad, own it. Fix it and share what you learned. Blaming circumstances, escalating past yourself, or quietly distancing from a decision you made are all failures of this value. At Dovetail, nobody will judge you for 'doing the thing' and taking a risk on a two-way door.

This value is often held up as being in direct conflict with if we do it, we nail it. However, these values complement one another when you treat it as a decision-making tool. The value isn't do everything. We need to ensure that what choose to do, we do it well, we do it fast. We don't need to do everything. The two values combined encourage us to be pragmatic and fast while keeping our quality bar high.

# What does Tomas have to say?

Tomas Belica  
Senior Workplace Operations  
Values Champion



**Do the thing is the value that, for me, sums up what working in a startup is really all about. It's simple—see something that needs doing, put your hand up, and get it done.**

It's easy to confuse this value with our other value if we do it, we nail it, but for me the distinction is clear; do the thing is about initiative, capability and accountability. It's about seeing something that needs to happen and putting your hand up, even when it's not your responsibility, even when you're not sure you're the right person, and even when the path forward isn't obvious.

In Workplace Ops, this shows up constantly. Startup life moves fast, and the scope of what you're asked to do can shift overnight. I've taken on tasks I never imagined would be part of my role, not because I was told to, but because they needed doing and I was in a position to help. That's the nature of working in a growing company, there are always gaps and someone has to step into them.

A good example was helping organize our International Women's Day celebrations. Like a lot of things in a startup, plans changed as new ideas came in and priorities shifted. Rather than worrying about whose responsibility each part was, I just picked up the pieces that needed doing and helped get everything over the line. That's what do the thing means to me. Sometimes the job isn't what you think—it's just making sure something happens because people are relying on it.

I also remember a guest at one of our meetups recently asked me what I'd learned from working at Dovetail. I didn't have to think about it. I said, "do the thing." That value sums up startup life better than anything else.

**You won't always have the *perfect* brief, *unlimited* time or someone telling you *exactly* what to do. Sometimes the best thing you can do is recognize something needs to happen, take ownership and get started.**

I've found that the more people who embrace that mindset, the stronger our team becomes. Everyone looks for ways to help, everyone fills gaps where they can, and together we make things happen.

# Value 3/5

If we do it,  
we nail it

First impressions matter. Sweat the details, don't sacrifice quality, and create an awesome experience at every touchpoint, whether it's support, our interview process, or the product.

This value is simple. If we can't nail it, we shouldn't do it. A feature that doesn't exist simply can't hurt our brand, but a bad user experience absolutely will. Remember that this extends beyond the product and our paying customers. It's just as important for how we show up internally. One of the aspects of Dovetail's culture that makes us unique is how intentional and thoughtful we are.

Commitment and quality are inseparable. Seeing something through means finishing it to a standard you would happily put your name on. First impressions matter and the details compound. Every touchpoint—a support reply, an interview loop, a shipped feature—either builds trust or erodes it.

Our quality bar is upheld by everyone, not just leaders. You get what you tolerate. Tolerating work that is consistently below standard—whether it's your own or someone else's—is how standards erode. That applies to craft but it also applies to how we operate: chronic lateness, commitments not followed through, or behavior that runs against the values. Holding the bar high means raising these things directly with the people involved, not working around them. When something slips, the most respectful thing you can do for you, your team, and the company is name it early and help to fix it.

# What does Maddie have to say?

Maddie Westerström  
Web Manager  
Values winner  
If we do it, we nail it



**For me, this value is about craft, execution, and prioritization. Not doing more, but doing the right things well.**

If we commit to something, we nail it. We don't ship for the sake of shipping, and if we can't do everything at once, I'd rather agree on a smaller scope and nail that first.

My personal test for whether something is nailed is simple: am I proud of it? If the answer is no, it's not done yet.

That matters everywhere, but especially on the marketing website. It's the front door to our business and often the first thing a potential customer sees. Every touchpoint with Dovetail should be nailed, but the website is where we get one shot at a first impression, so the quality bar there is non-negotiable for me.

One project that really captures this was migrating our marketing website from Contentful to a fully code-based system. Contentful limited how we could use AI, but the change affected how the entire marketing team worked. We took the time to do it properly and a month later, the whole team was working directly in the codebase. That shift worked because we took the time to craft the right solution and nail the execution.

Craft also means knowing you rarely nail things alone. Some of my best work has come from a teammate spotting something I'd stopped seeing or bringing a completely different perspective. The bar isn't fixed either; it keeps moving. Staying open to that is part of what it takes to truly nail something.

That's why sweating the details matters. It's the extra hour refining the animation, the detail nobody asked for but everyone notices, the edge case caught before a customer ever sees it. AI has made shipping easier but nailing the details is still the hard part. That's what makes the work stand out.

Deadlines matter too. In my role, the website is often the final piece of a launch. Product ships, then we go. If we're late, the whole launch is late. I take that seriously. I'll always push for the time needed to do something properly, but that has to sit within the commitment I've made to the wider team.

**The best work happens when we set the right priorities early, commit to the craft, and execute to a quality we're proud of.**

# Value 4/5

## Stay humble

Be authentic, humble, and empathetic to others. Remember the human behind the work. Operate collaboratively—rally around problems, and celebrate wins together.

This value is about how you hold what you know. Strong opinions are welcome, but hold them loosely. Update your view when the evidence changes and treat that update as the point rather than a weakness. Acknowledge what you do not know, ask for help early and often, and give credit out loud to the people who made something possible.

Humility is also how Do the thing stays safe. Ownership without humility turns into ego: decisions made without consultation, feedback received defensively, mistakes quietly buried. Ownership with humility looks like taking the call, doing the work, and then being the first to say what did not work and why. The best people here are both direct and humble. They move fast, and they stay teachable.

# What does Carlyn have to say?

Carlyn Shaw  
Brand Marketing Lead  
Values winner  
Stay humble



## Our “Stay humble” value is to be authentic and empathetic, to remember the human behind the work.

At Dovetail, this shows up in rituals like #karma and team stand-ups, but I would say the true depth of this value is revealed when opinions diverge.

To me, the essence of staying humble is recognizing that we are all tethered to the same mission. It requires a conscious trade-off between ego and collective progress. For example, I recently spent hours pouring my energy into the narrative for Insight Out 2026. I had a clear point of view, I’d done the thinking, and I believed in the direction. Then a team member challenged my fundamental approach, not just a detail, but the foundation of it.

My initial internal reaction was defensive. There’s a natural knee-jerk reaction when you’ve invested yourself fully in something, and someone questions it at its roots. But this value guided me to pause, and that pause made all the difference.

When I listened, I realized they were seeing something I couldn't. They brought a perspective shaped by a different discipline, a different relationship with our audience, and that's exactly the kind of input I would have missed if I'd stayed in my own head. The narrative got sharper. The message became more intentional and inclusive. It became something I was more proud of because it wasn't just mine anymore.

Dovetail hires smart people, and being humble means recognizing I shouldn't have all the answers. It's a privilege to be challenged by peers from different disciplines.

## **When we set aside the need to be right, we tap into a strength in numbers we wouldn't have alone.**

By listening to a perspective I couldn't have seen, I'm able to ensure we speak to our audience/customers in a way that is intentional, inclusive, and specific. As a marketer, this is gold.

The humility of this value also allows us to champion one another. Dovetail is a place to grow, and staying humble means recognizing that my team members' growth is just as vital as my own. Whether it's shouting out a great idea at demos or calling out the quiet effort someone put into a challenge, we have the opportunity to build people up. Since we spend more time at work than anywhere else, contributing to this positive environment is a simple necessity. Ultimately, staying humble is about taking ownership of challenges together and keeping the human element at the center of everything we build.

# Value 5/5

## Open by default

Trust others and assume good intent. You need to build context and understanding; so ask. Always share information freely... but be discerning about how you engage.

When strategic context and information is freely accessible and visible, alignment accelerates. When decisions are documented, ambiguity decreases. When trade-offs are surfaced, trust grows.

Open by default means 'open' is the starting point. Almost all work, blogs, ideas, and status updates belong in open Slack channels and open docs that anyone at the company can find and read. A lot of the time, feedback on work (e.g. design critique, architectural decisions, code review, sales coaching, pipeline reviews, campaign copy, and so on) should be delivered in open channels so that others can learn too. Private is fine for sensitive matters and confidential conversations, but generally you should be justifying why something is private, not why it's open and transparent.

This value is the one that makes the others work. You cannot put the customer first if customer evidence lives in a folder nobody opens. You cannot do the thing with real ownership if the context needed to make the decision is hidden. You cannot stay humble if your reasoning and your mistakes are not visible enough to be challenged. Openness is the foundation our values run on.

Finally, open and transparent access to information is simply more efficient as it enables individuals and teams the autonomy to be able to make good decisions quickly and with less stakeholders. This helps us scale the company as slow decision-making is one of the biggest limiting factors to velocity.

# What does Kelsey have to say?

Kelsey Rogalski  
Senior Onboarding Manager  
Values winner  
Open by default



## For me, open by default is less about sharing and more about trust.

It's a belief that when people have the full picture, they make better decisions, and that withholding information, even with good intentions, creates the kind of silent friction that slows both teams and our customers down.

In practice, that means acting on gaps without waiting to be asked. When we launched Contextual Chat in spring 2025, our CSMs were flooded with questions about best practices and prompting guidance. So I built a guide, worked with Product to make sure it was accurate, and had it in team's hands within the week. When I got Mintlify access in the fall, I turned it into a public webpage and added additional content.

When a customer asks a question I don't have the perfect answer to, my instinct isn't to wait until I do—it's to loop in the people who know, document what we find, and make sure that knowledge doesn't live just in an email thread or my own head. If I create a prompting guide, a help article, or a best practice doc,

it's because I saw a gap and thought:

**someone else is going to hit this wall. Let's take it down.**

But open by default isn't only about creating things, it's about saying things. Specifically, speaking up when you disagree, even when the rest of the room is quiet. Earlier this year, I participated in a dogfooding session for what would become our Spring IA rollout. Knowing that senior leadership would be reviewing the feedback didn't change what I wrote. I shared my honest, unfiltered perspective and advocated for what I understood our customers needed. That kind of session is one of my favorite parts of working at Dovetail—the genuine expectation and encouragement to speak your mind and explain your perspective, even when you disagree.

However, this goes both ways too. When you agree with someone, please say so. Don't let people stand alone in a room when you're right there with them.

Whether you're sharing work in progress, or your honest opinion, it can be uncomfortable to put yourself out there. But candor, offered with good intent and genuine curiosity, is what reduces ambiguity and builds trust.

What grounds me most of all, is why it matters. Context accelerates alignment. Surfacing misalignment builds trust. If we speak openly, share early, and stay open to challenge, we give ourselves the best chance of building the right things for our customers and improving the quality of every thing.

# How we work

In general we follow the principles in the [Agile Manifesto](#). We've built on these over the years and have coalesced around a few ways of working of our own, as set out on the following pages. Like our values, these help us stay intentional about how we communicate, collaborate, and make decisions as a team.

## Manifesto for Agile Software Development

| <i>This</i>                  |      | <i>That</i>                 |
|------------------------------|------|-----------------------------|
| Individuals and interactions | over | Processes and tools         |
| Working software             |      | Comprehensive documentation |
| Customer collaboration       |      | Contract negotiation        |
| Responding to change         |      | Following a plan            |
|                              |      |                             |

## Twelve Principles of Agile Software

01 Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.

02 Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage.

03 Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale.

04 Business people and developers must work together daily throughout the project.

05 Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done.

06 The most efficient and effective method of conveying information to and within a development team is face-to-face conversation.

07 Working software is the primary measure of progress.

08 Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely.

09 Continuous attention to technical excellence and good design enhances agility.

10 Simplicity--the art of maximizing the amount of work not done--is essential.

11 The best architectures, requirements, and designs emerge from self-organizing teams.

12 At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly.

# Relationships over process

We invest heavily in helping people build strong relationships with each other, even across teams and across timezones. While the Sydney office is in-person first and the US team is remote first, in both,

**the expectation  
is the same: you know the  
people you work with, *not just*  
the teams they're on.**

When something goes wrong across a team boundary, the first move is not to defer to a process, like waiting for the next cross-functional meeting, or escalating to your manager. It is to find the right people and work out the problem directly.

We spend real time and money bringing the team together as often as we can for retreats, off-sites, cross-office visits, and team gatherings. These are all deliberate investments in the connective tissue that makes everything tick. Strong relationships are what let us hold off on process for as long as possible. Process is not the enemy; it has its place. But when the underlying issue is relational, process is the wrong tool.

We solve problems through people rather than paper over them with policy. Leverage the relationships you build to engage directly, share context on a challenge or request, and make real-time progress, instead of waiting for a response.

Because we operate across multiple countries and timezones, sometimes collaboration happens on a video call. We treat those moments as extensions of working side by side, not just transactional check-ins. That means showing up, being present, and engaging in the conversation. Have your camera on where possible, unmute your mic, and actively contribute. These are simple ways we build familiarity, trust, and momentum. Relationships don't happen by default in a distributed environment—they're built and strengthened through active participation.

**Finally, at Dovetail,  
we refer to people by their  
names, *not* their team.  
"Sales said no" and  
"that's design's fault"  
are not statements that  
will get you far here.**

# A writing and reading culture

- > We default to writing for
- > anything consequential:
- > proposals, irreversible
- > decisions (one-way doors),
- > strategy, feedback on
- > direction. It's the highest-
- > leverage communication
- > tool we have.

## Writing forces clarity.

The intentional exercise of putting an idea into words on a page exposes the gaps in your thinking before anyone else has to find them for you. It forces clarity.

## Writing compounds.

A conversation reaches the people in the room. A well-written doc has limitless reach: everyone who needs the context, now and six months from now. Written once, read thousands of times. Invest the time to make your writing clear, concise, and structured.

## **Writing works across timezones.**

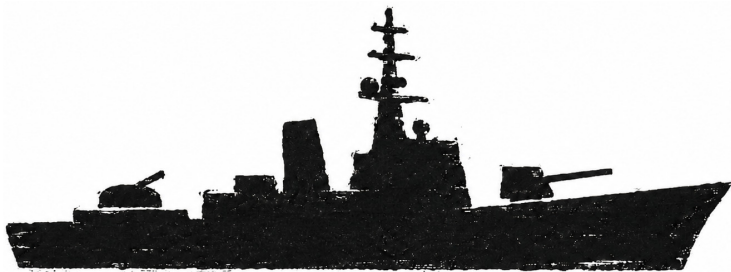
We operate across multiple countries and timezones. The team that writes well moves faster than the team that waits for a meeting. A decision captured in a doc at 5pm in Sydney is context that a teammate in the US can act on before lunchtime.

## **Writing can be collaborative.**

A doc expresses a point of view that can be revised, sharpened, and reconsidered in the pursuit of maximum clarity. Share early drafts with peers or your manager before they are perfect so you can get relevant input, perspectives, and drive alignment.

A writing culture only works if there is also a reading culture. When someone shares a pre-read, read it. When a decision is documented, engage with it. Writing into a void is worse than not writing at all, because it teaches people that the effort is wasted.

A note on writing with AI. While AI can help you write and refine, using AI to write in full is like hiring somebody to work out at the gym for you. The actual act of writing is a critical part of your own ideation, synthesis, and review process. Outsourcing writing to AI undermines this. Finally, AI-written content tends to be inaccurate, unnecessarily verbose, and vague. Be respectful of your reader and avoid building a reputation for sharing AI-generated "slop" content. People will simply stop reading.



## The captains model

At Dovetail, every project has a captain.

Not ten partial owners.

Not shared accountability that becomes *no* accountability.

One person that is solely responsible for the outcome of the work.

A captain doesn't do everything themselves. They make sure everything gets done. They define what success looks like, assemble the right team, escalate when faced with roadblocks, communicate proactively, and own the result, good or bad.

## What a captain does

|    |                                                                                           |
|----|-------------------------------------------------------------------------------------------|
| 01 | Defines "done": deadlines, milestones, decision points, and quality expectations          |
| 02 | Assembles the right crew: delegates and assigns work rather than doing all the work alone |
| 03 | Escalates early when blocked, with context and clarity, to quickly unblock the project    |
| 04 | Communicates updates proactively so nobody is surprised by a change in direction          |
| 05 | Owens the outcome, even when things go wrong                                              |

## Three questions everyone should answer

|    |                                                                                                           |
|----|-----------------------------------------------------------------------------------------------------------|
| 01 | <b>What am I the captain of?</b> Everyone owns something: a metric, a process, a project, or an outcome.  |
| 02 | <b>What doesn't have a captain?</b> Ambiguity creates drag. Spotting captain-less work is everyone's job. |
| 03 | <b>If I'm not the captain for this piece of work, how can I best support the person who is?</b>           |

**One captain per ship. The moment you hear "we both own it," you're looking at work that will stall.**

# Making clear requests

> **Good**  
> **delegation**  
> **is**  
> ***hard.***

When people take on work and things go wrong, sometimes it's because the initial request you made was unclear.

## A clear request has four parts

<I> request that <you> do <X> by <Y>.

|     |                                                                              |
|-----|------------------------------------------------------------------------------|
| I   | The owner. The person making the request is accountable for the outcome.     |
| You | A single responsible person for doing the work. Not a group. Not "the team." |
| X   | A specific, measurable result. No room for ambiguity.                        |
| Y   | A clear date. A request without a date is not a request.                     |

## There are four valid responses

|                  |                                   |
|------------------|-----------------------------------|
| Yes              | I'll do it by then.               |
| No               | I can't or won't and why.         |
| Counter-offer    | I can't do X; I can do Y instead. |
| Commit to commit | I'll confirm by <date>            |

A genuine "no, I can't do that" is much more valuable than a hollow "yes" with no follow-through. A counter-offer keeps things moving. A vague non-answer helps nobody.

Be clear in your requests of others, clear in your responses to requests, and keep work moving.

## Meeting types and norms

In the spirit of being intentional about how we work together, we also have a system to ensure productive meetings at Dovetail. Every meeting falls into one of four categories. State the type on the invite, for example **"Decide: Launch our new feature into beta"** or **"Bond: Team lunch"**.

### `_norms`

## Norms we protect

Pre-reads are always sent and shared 24 hours in advance for decision meetings. Every meeting has a clear owner. Decisions are documented in Dovetail, Slack, or Linear—not lost in the meeting. You have the right to leave a meeting that no longer needs you. You have the right to decline a meeting with no agenda. Default to having your camera on for remote meetings.

## Decide

Make a choice or align on a direction. One clear owner. Pre-read shared 24 hours in advance. Ends with a documented decision or a clear owner for the decision. The notes can be in a Dovetail doc or shared in a Slack message, ideally in an open channel.

## Learn

Share knowledge or context that's hard to absorb asynchronously. If it can be a Slack post or a doc, it should be. Reserve meeting time for the conversation. These meetings are often brown bags or 'lunch and learns' where one or more people are sharing knowledge.

## Bond

Build relationships and strengthen trust. These have a plan, not necessarily an agenda. Demos count. So does a working lunch. Don't let project updates crowd out the real purpose. There's nothing wrong with going to the pub or the beach to get to know one another.

## Do

A working session. If you're in it, you're rolling up your sleeves. Keep it time-boxed. If the work finishes early, end the meeting. These meetings are usually multi-hour workshops where everyone is working on a whiteboard with sticky notes or using their laptops.

**No standing 1:1s**

**We do not run standing 1:1s, either between managers and direct reports or between peers. This takes a little unlearning for people joining from companies where the weekly 1:1 is a default.**

Standing meetings create the illusion of connection without necessarily producing any. They consume hours of the calendar every week whether there is something to discuss or not, and they shift the work of communication from in the moment and in the open to later and behind a closed door.

Managers at Dovetail are on the tools and experts in their craft. They deliver outcomes, coach through real work, and teach by example. The captain flies the plane. The surgeon performs the procedure. The law partner practices. The best feedback a manager can give happens in the flow of the work, not in a 30-minute slot on Wednesday afternoons. No standing 1:1s doesn't mean no 1:1s. For structured feedback, performance reviews, or sensitive conversations, book a 1:1 deliberately and make it count.

The same logic applies to peers. If you work closely with someone day-to-day, you're already teaching, learning, and giving each other feedback. A standing peer 1:1 usually just moves that conversation out of the work and into a separate calendar block which makes it slower, less useful, and a context switch that can take you out of your flow. Protect your calendar for the work itself, and if you need to work with someone else, you can always walk over to their desk or schedule time for a Do meeting.

# How we present

## Group presentations can be daunting but are a **necessary** evil in the world of work!

At Dovetail, regardless of your role, there will be times where you will have to present to a group, for example at Friday demos, Make It hackathons, or onstage at an event or conference. The below tips have been battle tested by countless presenters over the years at Dovetail, refined throughout hundreds of terrible presentations with the now iconic “zoom in” yelled out almost every time.

### A good product demo

- 01 ◀ Hey everyone, I'm <X> from TEAM <Y>.
- 02 ◀ I'm going to show you FEATURE <Z>.  
We built this feature because of  
CUSTOMER PROBLEMS <A>, <B>, <C>.
- 03 Share screen and zoom in to 150% (minimum) in Chrome so it's nice and big on the TV.
- 04 Walk through the solution demo →  
how you solve CUSTOMER PROBLEMS.
- 05 Finish with impact (THIS MEANS OUR CUSTOMERS...) and any specifics (e.g. LAUNCH DATE).
- 06 Also, keep it short and concise!  
It's always better.

# Hot tips for great presenters

|    |                                                                                                                                                                                             |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 01 | <b>Introduce yourself</b><br><br>Say who you are, and from what team.<br>Not everyone knows! Especially new hires.                                                                          |
| 02 | <b>Don't assume people know anything</b><br><br>To assume is to make an ASS out of U and ME.<br>Provide an intro and context up front.                                                      |
| 03 | <b>Explain the <u>why</u></b><br><br>Make sure you talk about the WHY behind things, not just the WHAT. Explain the value/impact (e.g. to customers, to your audience).                     |
| 04 | <b>Use the problem, solution, impact flow</b><br><br>For demos and pitches, the simple framework is PROBLEM (current scenario), SOLUTION (demo), then IMPACT (how solution solves problem). |
| 05 | <b>Zoom in, please!</b><br><br>Remember to ZOOM IN when presenting anything. People are usually far away from the TV. Hit [CMD][+] on the keyboard in Chrome to zoom in.                    |
| 06 | <b>Set up shortcuts</b><br><br>Handy accessibility shortcut on Mac:<br>Accessibility → Zoom → Use scroll gesture with modifier keys to zoom (set to ^ Control)                              |

# How we give feedback

Feedback is how people grow at Dovetail and it is expected to flow daily. Managers to reports, peers to peers, reports to managers.

## Everyone is both a giver and a receiver.

Direct, specific feedback is a kindness. Sitting on feedback because it feels awkward is not a neutral choice. It keeps something from the other person they need to be more successful. This is do the thing applied to a harder kind of work: saying the thing, clearly and early, rather than working around it.

Most feedback happens in the open in the flow of day-to-day work, just like builders on a construction site or mechanics in a garage or nurses in a hospital. Feedback on a piece of work belongs in a design review, an engineering review, or a public thread where others can learn from it. Feedback on how someone is operating—like chronic lateness or commitments not followed through—can also happen in the open because it sets a shared expectation for the team. Feedback on more sensitive topics, general attitude, or anything personal should happen in a 1:1. You should be sensible about when and how you give feedback, but as with everything at Dovetail, you should be open by default.

Receiving feedback well is a skill, and it is where stay humble gets tested.

# → First, assume good intent. 😊

The people who work here rarely have truly bad intentions. It's much more likely that the person giving you feedback genuinely cares about your success at Dovetail and in your craft and career. Ask clarifying questions before reacting. If you disagree, say so. Feedback is a conversation, not a verdict, but do the work of actually considering it before pushing back. If you need to take some time to digest and consider, that's fine too. Just make sure to close the loop.

# How you grow here

Dovetail is a [meritocracy](#). Growth at Dovetail is earned through a combination of expanding what you own, improving how you operate, and building experience and context through tenure. Not by moving further away from the work. The further you progress here, the more surface area you cover. One way to think about growth and promotions is that you can stretch further both *horizontally* and *vertically*.

## Meritocracy

[*merit*, from Latin *mereō*, and *-cracy*, from Ancient Greek κράτος *kratos* 'strength, power'] is the notion of a political system in which economic goods or political power are vested in individual people based on ability and talent, rather than wealth or social class. Advancement in such a system is based on performance, as measured through examination or demonstrated achievement.

## **Head in the clouds, feet on the ground**

You hold the vision and drive day-to-day execution at the same time. This means finding the time to dream big while sweating every last detail to bring your vision to life.

## **Don't mistake motion for progress**

The feeling of motion doesn't automatically equal progress. A rocking horse at the mall might feel like you're being taken for a ride, but in actual fact, you haven't moved at all. Real work happens in the workshops, the critiques, the pairing sessions, the design reviews, the retros, the brown bags, and the time we spend doing the work.

## **Ownership requires context**

Taking ownership isn't just doing more and being responsible. It's knowing enough to make good calls. The people who grow fastest here build deep knowledge of our customers, our product, and our business. They understand the reasoning behind past decisions before proposing changes. They know what customers actually experience, not just what the data says.

## Managers stay close to the craft

Management here does not mean stepping out of day-to-day work to manage from above. Managers at Dovetail remain deeply fluent in their craft: engineering managers write code, design leads do design, marketing leaders publish copy. Staying close to your craft is how you earn respect, build context, coach effectively, and spot problems. It's also how you keep learning—techniques, tools, and the standard for what good looks like change quickly. Don't fall behind.

## Leadership doesn't always = management

We value craft specialists and domain experts as highly as managers. These are parallel paths, not a hierarchy. A senior engineer or designer shapes the direction of the company through their work and judgment, not through managing headcount. Our senior individual contributors have a seat at the table. They're in the room for hard calls because they've built the context and earned the trust. The way you earn that seat is by taking ownership of outcomes that matter and consistently raising the bar in your craft. The more you take on, the more influence you have.

# What it looks like at different levels

## 01 Early in your role

- >
- > You execute with reliability. You ask good
- > questions. You surface problems early and come
- > with ideas. You are building context fast and
- > showing you can be trusted with more.

## 02 As you become more senior

- >
- > You define the work, not just complete it.
- > You operate without a playbook. You set the
- > standard for others through your own output.
- > You take accountability for outcomes your team
- > owns, not just your own tasks.

## At a leadership level—

## 03 Whether managing people or not

- >
- > You are deeply fluent in your craft. You are
- > on the tools, coaching through real work
- > and teaching by example. You run toward hard
- > problems. You hold the bar for the people
- > around you. You create the conditions for
- > others to do their best work by delegating
- > effectively, while ensuring your fingerprints
- > are on the output, not just the oversight.

# Intentional design

Technology changes. Competitors change. Politics changes. Everything will look different in a few years. The question is, how do we build an enduring organization that has the intrinsic ability to overcome any change, any challenge, to endure any hardship, to be everlasting?

For us, the answer is clear: intentionally designing and investing in our mission, our values, and the norms of how we work together. This handbook is an example of intentional design as it documents our culture. Everything else is built on top of this foundation.

# Dovetail exists to improve the quality of **every thing.**

Those improvements reach real people who rely on these products: the new dad navigating a government

portal, the tired nurse using clinical software at 2am, the student opening a textbook that was designed for how they learn. The impact of our software is tangible and has already been felt across thousands of teams in education, healthcare, government, and technology. And it scales with us. The further we go, the more of the world we reach.

But we're just getting started. The path ahead is long and will always be uncertain. We need to get comfortable running through doors at full speed without knowing what's on the other side, but doing it with judgment, not just urgency. We make the call with the best information we have, we move, and we correct fast when we are wrong. We cannot expect different outcomes using the same approach.

Everything in this handbook—our mission, values, working principles, the standards we hold for ourselves and each other—exists to make it possible for a small team of smart, ambitious people to figure out hard problems together, over years, through change and across timezones.

## Whether you're new here or have been here for years, I ask this of you:

**01 Set the standard.** We get what we tolerate. If a piece of work, a process, or a behavior doesn't meet our bar, tackle it directly. That's respect for the work, for the team, and for the person.

**02 Use the values to make decisions.** Not to describe our culture at a dinner party. To make the hard calls. If you're in a debate and nobody has referenced the values, slow down.

**03 Stay close to the work.** The further you drift from your craft, the less useful your judgment becomes. Leaders at Dovetail stay on the tools and everyone stays close to our customers.

**04 Stay ambitious.** Individuals and teams are often far more capable than they realize. We have a huge opportunity to nail an ambitious mission and be extremely successful. It's ours to lose.

**05 Keep going.** Building an enduring company isn't a sprint. It's a long, demanding, rewarding project that requires all of us to keep learning, raising the bar, and showing up for each other.

—Benjamin Humphrey, Co-founder & CEO

The Good Ship Dovetail





