

## Workshop II: Articulating Mission, Vision and Values Statements

**Part I:** Teams of five are instructed to identify three themes that cut through all three values reports\*. Once the themes and values are identified, three statements that embody the selected values are developed.

**Part II:** Teams are folded into groups of at least two teams. Each group further refined and re-articulated the values statements developed by the smaller teams, consolidating some statements. From these nine to twelve statements, the three most compelling themes are identified. For example, INNOVATION/LEARNING, COMMUNITY, SERVICE.

**Part III:** By randomly assigning the numbers 1, 2 and 3 to each person, three final working groups are formed. The instructions to each group: i. Name the theme ii. List the underpinning values iii. Write a statement according to the suggested format:

"We are building an organization where..."

"To achieve this we will need to be able to..."

### RESULTS

In a highly iterative, consensual and collegial process, each group aggregates the contributed value sets formed by various teams and divides them into the Foundation, Focus and Vision categories. Once this task is completed, each group crafts the values statements.

#### Examples 1: Learning/Innovation

**We are building...** an Organization where we continually explore with our Customers new ideas through Learning and Innovation. **To achieve this...** we will need to foster an interactive learning environment appropriate for our evolutionary organization. We must be unceasing, pioneering, and restless in this exploration with our Customer.

#### Example 2: Community

**We are building...** an Organization where we share and listen to one another in a climate of mutual confidence in one another's integrity, as we work to provide the finest partnering experience [Sharing/Listening/Trust] **To achieve this...** we engage ourselves in...utilizing cutting edge technologies and systems to achieve profitable, collaborative, customer-centric solutions [Collaboration]

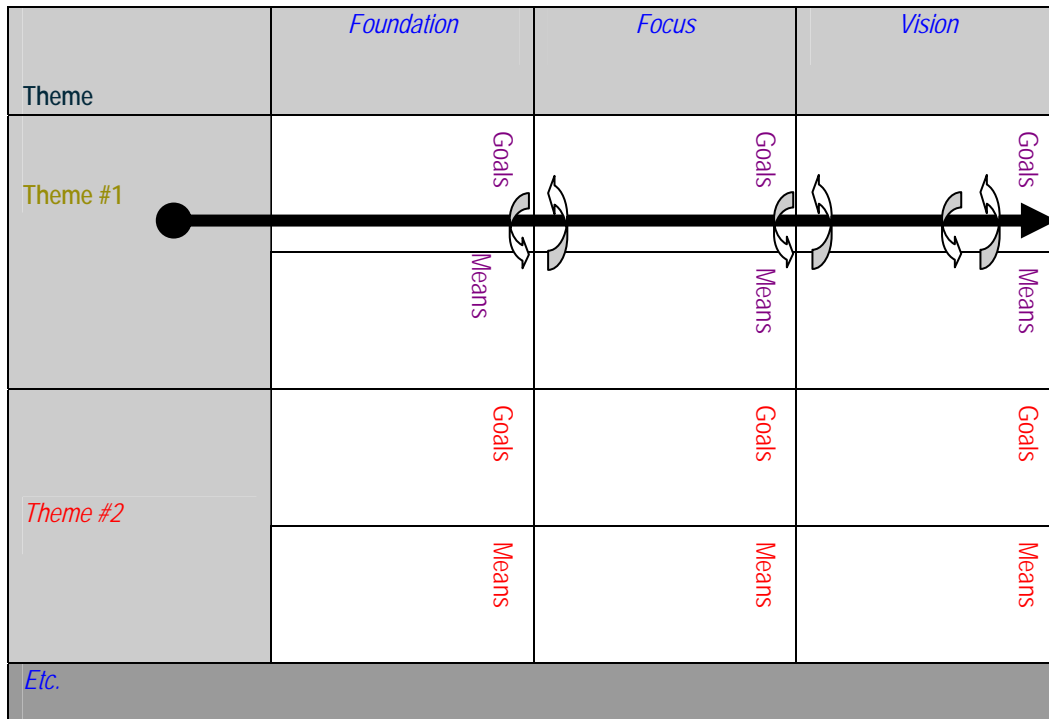
**The Situation:** You know that more than ten years of organizational literature on the topic of values indicates that core values are a hallmark of great and enduring organizations. You know that when an organization has stated values based on the values sets of its employees, and operates from a position of living its values, the employees feel integrated with the organization. The impact of values-based management on organizations is powerful, significant and compelling. You have requested that all employees complete a Conductive Values Survey, and now wish to articulate, or re-articulate, your company's values, mission and vision statements.

#### Target Audience: Senior Managers

Three reports are presented: an individual values report, a group values report, and a company-wide values report. To gain familiarity with the Conductive Values Assessment, participants are paired and instructed to describe to their partner three values they personally deem important (as identified in their individual report). Each person then introduces their partner to the group through an articulated values perspective. To conclude the session, everyone is asked to craft their own personal values statement.

#### Organizational Work

*Now armed with a better understanding of the values categories and values statements, participants are asked to interpret group and company-wide results.*



**Table 1:** This chart can be used to position values according to identified themes. When all the values are placed in the chart above, the themes and interrelationships between supporting values becomes evident.

**Deliverables:** One Day Workshop

**Value Proposition:** Elevate the senior managers' strategic view of the power of values-based management in the organization through a collaboratively developed *Platform for Cohesive Action* focused on articulating mission, vision and values statements, and subsequently tying these statements to company strategy.

**For further information:** Contact Margaret Logan

<konvergeandknow>

400 University Avenue, Mezzanine

Toronto, Ontario, Canada M5G 1S5

Tel: (416) 640-2345 Ext. 237 Toll Free: 1-866-640-2345 Ext. 237

Mobile: (416) 723-8515

Fax: (416) 640-2344

E-mail: [Margaret.Logan@knowinc.com](mailto:Margaret.Logan@knowinc.com)

### \* CONDUCTIVE VALUES SURVEY

We offer a 60 – 100 item questionnaire (20 – 40 minutes to complete depending on the number of items) online. The survey assesses work values and presents the resulting values in order of importance. Data analysis indicates the shared core values of the organization, and can segment down to a group of ten individuals.

**1. Service I** (higher order service) – global perspective, volunteerism, social values focus, corporate social responsibility; ethics focus; altruism; democracy; concern for future generations; ecological awareness

Example Behaviours:

triple bottom line reporting (economic prosperity, environmental quality, social justice); sustainable development practices;

**2. Service II** (customer service) – customer service; customer focus; serving the customer; empathy

Example Behaviours:

Crafting a business strategy that is coherent with customer needs; Facilitating the necessary reconfiguration of resources dedicated to serving a particular customer's needs; consciously uncovering the unarticulated needs of the customer (and becoming the first market mover); knowing a customer's preferences; continuous alignment and realignment of capabilities of the organization in order to serve the customer better; constantly calibrating an organization's strategy, culture, structure and systems to the needs of its customers and the marketplace; intimate understanding of the customer's requirements;

**3. Trust** – interpersonal trust, openness, honesty, fairness, obedience, justice; dependability, predictability and faith (in another); reliability, integrity

Example Behaviours:

I trust my co-workers to deliver on their commitments;  
I trust my colleagues to uphold our core values;  
I trust my colleagues to share relevant information in a timely manner;  
I am trusted by the management of the company;  
I have high trust in the leadership of the organization;  
I have the expectation that my colleague can be relied upon to fulfill obligations, will behave in a predictable manner, and will act fairly when the possibility for opportunism is present

**4. Self-Initiation** – problem-solving; commitment to applying learning; employee takes responsibility for, and ownership of, their own performance and learning; willingness to invest time and energy in learning and integrating learning into everyday approach to work.

Example Behaviours:

Identify a business issue and undertake to address it;  
"do-ers";  
problem-solvers;  
modus operandi as "a business of one";  
Taking responsibility for expanding the bandwidth of the organization and increasing the quality of conductivity within the organization;

turning information gathered from the external environment into strategically valuable knowledge within the organization (see also continuous learning);

**5. Leadership** – ability to communicate [strategy] broadly and effectively; governance; ethical behaviour by example

Example Behaviours:

Leads by fostering values and a culture based on interdependence;

Synchronizes strategy, systems, structure and culture and keeps them evolving;

Determines the bandwidth of knowledge flow;

Provides a catalyst for others to exercise their responsibilities;

Encourages self-initiation, trust, interdependence and partnering;

Makes possible the assembly, disassembly and reassembly of cross-disciplinary teams;

Fosters an environment of learning;

Builds an organization where customer and employees are committed to the organization's vision;

Leverages both capital and knowledge assets;

Creates value by building on ideas, including those of customers and suppliers;

Minimizes "organizational walls" in order to optimize the ability to exploit rapidly and unpredictably changing market opportunities;

Facilitates quick access to the total skills base of the organization;

Manages accountabilities through a shared sense of responsibility;

Facilitates the necessary reconfiguration of resources dedicated to a particular customer's needs;

Purposefully generates knowledge, expertise and new capabilities that anticipate marketplace demands;

Rewards value-adding contributions through teams.

**6. Tolerance** – openness to change, respect for diversity, flexibility, adaptability to change

Example Behaviours:

We are meritocratic (focused on individual skills and creativity);

We value individual skills;

We are a multi-lingual organization, with over 30 languages spoken;

Our customers are diverse; therefore diversity in the workplace is desirable in order to better meet the needs of our customers.

We acknowledge all secular and religious holidays on the company bulletin board;

**7. Community Celebration** – teamwork, fellowship, collegiality, receiving and bestowing credit when it is due

Example Behaviours:

Success stories are celebrated in the company newsletter;

Weddings, birth announcements and personal achievements are celebrated in the company newsletter;

5 year, 10 year, 15 year and 20 year levels of employment are acknowledged in an annual awards ceremony;

**8. Innovation** – creativity, inspiration, inventiveness, originality, pioneerism

Example Behaviours:

The kinds of things that are important to creative workers are intrinsic desires: challenge, responsibility, working on great technology, being the best, making a difference, being able to work with great people.

We are a market shaper;

#### **9. Partnering** – negotiation, collaboration, sharing/listening/trust

Example Behaviours:

The organization has communities of practice in place;

The organization has mentor-mentee relationships in place;

The organization uses a team approach for problem solving;

The teams represent cross-functions;

The organization participates in value-creation networks;

We have partnership relationships with our customers;

Most of our customers would be open to the possibility of partnering;

With my colleagues, I take joint responsibility for co-creating the future of the organization;

We undertake joint ventures;

We are successful at merging operations;

#### **10. New Capability Generation** – competency improvement e.g. improving service delivery, increased knowledge, identification of best practices as a benchmark,

Example Behaviours:

We are able to prepare ourselves with new skills required to remain competitive in the marketplace; Individual Development Plans (IDPs) which identify new (professional) skills development are part of an employee's performance review;

#### **11. Continuous Learning** – characterized by continual improvement through new ideas, knowledge and insights which one uses to constantly anticipate, innovate and find new and better ways to fulfill the organization's mission; credibility; professional growth; maintaining excellence; successfully identifying and applying best practices;

Example Behaviours:

turning information gathered from the external environment into strategically valuable knowledge within the organization;

Regularly takes advantage of in-house learning programs;

Provides feedback and questions related to new material/processes;

Possesses the ability to ask the right questions;

Active problem solving through exploration;

Productive reasoning in order to reach an objective (engage a customer in a complex sale);

#### **12. Commitment/Perseverance/** - drive, loyalty, discipline,

Loyalty

Loyalty to a set of principles that will enable a business to serve all its constituents well through time; a commitment to creating so much value for customers that there will be plenty left over for employees and shareholders;

#### **13. Responsibility** - achieving business outcomes, profitability, accountability, obedience/duty

**14. Courage/Risk Management** – risk, adventure

Example Behaviours:

Uphold core values in the face of behaviours that are contrary to those values;

**15. Self-Actualization Work Ethic** - opportunity to use initiative; a job where you can achieve significant value for the organization; self-determination (See also Self-Initiation.)

**16. Efficacy** – capacity or power to produce a desired effect;

Example Behaviours:

rapid problem-solving through productive reasoning;

unwillingness to blindly follow instructions (decline of deference);

Ability to “reason productively” when developing a business solution;

meaningful participation in workplace decision-making;

Ability to “make a difference”;

**17. Efficiency/Planning** -- agility, speed, sense of urgency, control

Example Behaviours:

Identifying and applying ‘best practices’ at the individual and team levels; (Definition of best practices: the processes, practices, and systems identified in public and private organizations that performed exceptionally well and are widely recognized as improving an organization's performance and efficiency in specific areas. Successfully identifying and applying best practices can reduce business expenses and improve organizational efficiency.)

Note: Related to ‘continuous learning’ and ‘capability generation’.

**18. Competence/Confidence** – achievement, attainment of goals and aspirations, esteem, talent, quality, excellence, know-how, social affirmation, Behaviours:

Ability to challenge the competition effectively;

Active practice of creating value for the customer through an individual's knowledge and skills;

Pro-active development of capabilities in order to anticipate and maintain marketplace readiness;

**19. Independence** – interdependence

Example Behaviours:

I contribute capabilities to the network relationship and I will in turn receive new capabilities reciprocally;

Through collaboration, we know we can create more value for our customer;

I will be successful when I help contribute to the success of my colleague;

I am not in competition with my colleagues;

**20. Respect** – operating in a supportive environment, courtesy, hospitality  
Our employees listen to each other with the goal of creating new capabilities;

**Generosity** – capacity to share information, sharing learning with others, sharing know-how, sharing workload (See also Partnering)