OnStrategy

Identifying & Living Your Core Values

Define and articulate how people in the organization are expected to behave.

In this guide, we will cover:

- **The Power of a Values Statement**
- **Anatomy of a Values Statement**
- **Example Values Statements**
- **3 Ways to Live Your Core Values Everyday**
- **How to Facilitate the Creation Your Values In-Person**
- **How to Facilitate the Creation Your Values Remotely**

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Introduction

The Power of Values Statements

Values are deeply held convictions, priorities, and underlying assumptions that influence your organization's attitudes and behaviors. They're the enduring, passionate, and distinctive core beliefs that serve as your sounding board for how you'll behave as a team.

Your core values and mission statement are part of your strategic foundation: the beliefs and purpose you and your team adhere to so you can achieve your vision of success.

Why Are Core Values Important?

Most commonly comprised of 4-7 smaller, concise statements, core values become the guiding principles for how people in an organization are expected to behave, how teams treat each other, and how you expect your organization to treat your customers.

These statements are to be embedded in your every day, from daily actions to long-term strategic focus.

A strategic plan is not complete without a declaration of the underlying beliefs in your organization. These core values need to guide your team as you develop your strategic plan, informing what strategic choices you will [or will not] make to stand with your values.

Core Values Answer These Questions

- What key non-negotiables are critical to the success of the company?

- What guiding principles are core to how we operate in this organization?

- What behaviors do you expect to see from the team?

- Are you willing to stand by these values no matter what the cost—for example, lost clients or lost revenue?
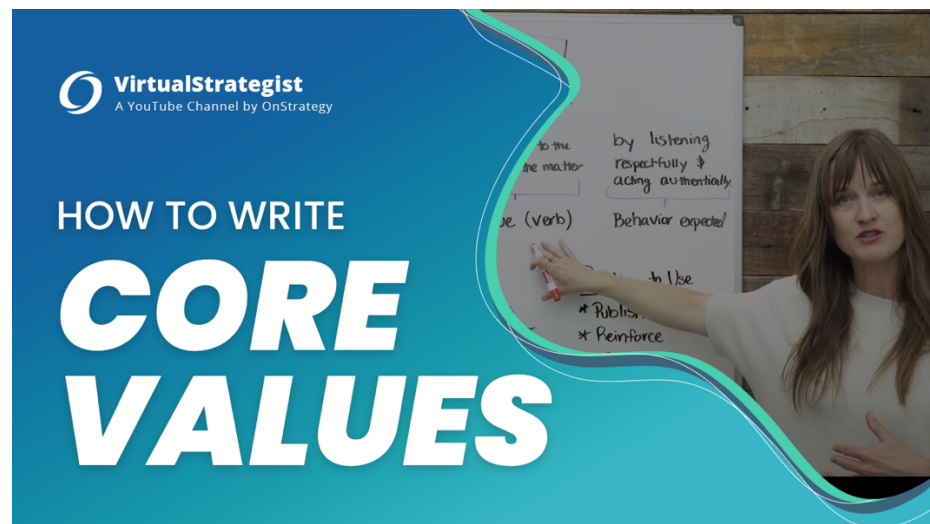
Watch the Video

Anatomy of a Core Values Statement

Respect & Authenticity: *We believe in connecting to the heart of the matter as demonstrated by listening actively and acting with respect and authenticity.*

LABEL

Respect & Authenticity:

Value stated as a noun

VERB

We believe in

Verb in present tense

VALUE

connecting to the heart of the matter

Value as a verb

BEHAVIOR

as demonstrated by listening actively and acting with respect and authenticity.

Behavior you expect to see
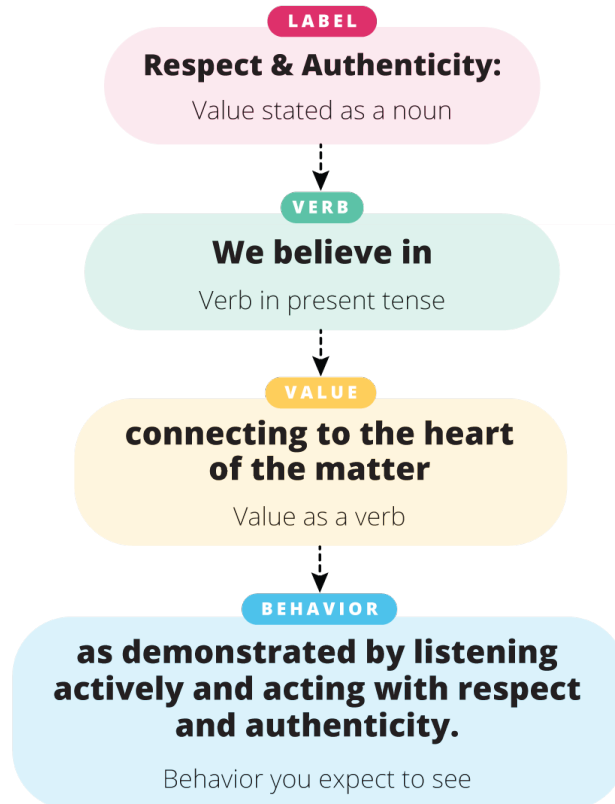
Example Core Values Statements

Following are the core value statements from four different organizations: a global privately-held corporation, a b-corporation, a national non-profit, and OnStrategy's core values. Each illuminate the specific ways teams have identified and described what's at the core of their organizations.

Zappos

Embrace and Drive Change: Part of being in a growing company is that change is constant.

Be Humble: While we have grown quickly in the past, we recognize that there are always challenges ahead to tackle.

Pursue Growth and Learning: We think it's important for employees to grow both personally and professionally.

Be Passionate and Determined: Passion is the fuel that drives us and our company forward.

Patagonia

Build the best product: Our criteria for the best product rests on function, reparability, and, foremost, durability. Among the most direct ways we can limit ecological impacts is with goods that last for generations or can be recycled so the materials in them remain in use. Making the best product matters for saving the planet.

Cause no unnecessary harm: We know that our business activity—from lighting stores to dyeing shirts—is part of the problem. We work steadily to change our business practices and share what we've learned. But we recognize that this is not enough. We seek not only to do less harm, but more good.

Use business to protect nature: The challenges we face as a society require leadership. Once we identify a problem, we act. We embrace risk and act to protect and restore the stability, integrity and beauty of the web of life.

Not bound by convention: Our success—and much of the fun—lies in developing new ways to do things.

Volunteers of America

Teamwork: Together, as a team, we can achieve what individuals cannot. Our individual strengths energize our joint efforts to improve the lives of the people we serve.

Respect: We are richer and stronger because of our diversity and we promote an environment that offers dignity, understanding, and compassion in order to reach and empower all.

Accountability: We hold ourselves personally and collectively responsible to do right and adhere to ethical principles in an environment of openness and honesty.

Communication: We are committed to the timely and transparent exchange of information and ideas and encourage respectful interaction through listening, understanding, and assumption of positive intent.

Customer Service: We strive for the highest standards in all we do and seek continuous improvement through feedback from our partners and those we serve.

OnStrategy

Respect & Authenticity: Connecting to the heart of the matter. We listen actively and act with respect and authenticity.

Teamwork: Tribal spirit. Cohesive spirit that permeates our people – focus: family, team, clients and partners.

Purpose & Impact: Make a difference. We approach everything with passion and purpose and know our work is bigger than ourselves.

All In – In Everything We Do: We do our best with excellence in everything we do.

Forward Thinking: Challenge the status quo. Continually pursuing innovation, not for innovation sake, but for the sake of propelling our clients and our work forward.

Enjoyable Work Environment: Perfect storm. Energizing atmosphere that nourishes a balanced personal/professional soul.

Teaching Organizations to Fish: Passing the torch of mastery. Our expertise transfer allows for sustainable strategic management.

3 Ways to Live Your Core Values Everyday

Integrate a Review into Your Staff Meeting

A great way to reinforce behavior backed by your organization's core values is to integrate a value each week into your weekly staff meeting. In our own weekly staff meeting, we highlight a core value of the week and how that value impacted the team's work in the previous week.

In a week that is heavily focused on detail-oriented teamwork, we might highlight our value of, "**All In – In Everything We Do**" to remind our team that details matter.

Create a Dedicated Chat/Teams/Slack Channel

Create a dedicated chat channel in your preferred application to highlight team member behaviors that align with your core values.

Think of this channel as a "wins and kudos" to individuals' and group behavior aligned with how you expect your organization to behave.

We like this tactic as it creates an instant line of positive feedback and helps keep your core values front-and-center within your organization.

Highlight Customer Feedback & Success

Highlighting customer feedback/success that was driven by behaviors outlined in your core values is a great way to reinforce their impact.

Positive customer feedback and testimonials are high-value rewards in any organization. Tie those recognitions to how your core values created that outcome. We promise it will leave a lasting impact on your team.

An Exercise to Identify Your Values

Since values reflect the beliefs and behaviors of your team and organization, it's not an exercise we recommend completing alone.

Your values need to reflect your entire organization; we recommend completing this exercise with your broader team to reflect what your organization values holistically.

Materials Needed

- Small Sticky Notes – 3 to 5 Per Person

- A White Board or blank wall. Alternatively, you can use a whiteboard tool like Miro or Mural if you want to do this exercise virtually.

Step 1: Set Up the Whiteboard

Setting up this whiteboard is simple. The easiest way is to draw ten vertical columns across the board. As you complete this exercise, either virtually or with your team, you will use these columns as theme areas.

We also recommend adding these three core questions to the top of your whiteboard facilitation as prompts for your team to consider during the exercise:

- What key non-negotiables are critical to the success of the company?

- What guiding principles are core to how we operate in this organization?

- What behaviors do you expect to see from our team?

Identify Your Core Values

What key non-negotiables are critical to the success of the company?	What guiding principles are core to how we operate in this organization?	What behaviors do you expect to see from everyone on our team?

👍 **Pro Tip: We like adding these prompts above the exercise as guideposts for thinking**. You'll ask your team specific questions in step two, but these are still nice to consider as you complete the exercise.

Step 2: Have Each Team Member Identify Behaviors They Believe are Core Values

Core values are not **created** in an organization but instead **identified from your team's current behavior.** The best core values articulate behavior your team already exhibits, which are essential to your success —so important they warrant being core values.

Provide each person in the room with 3 to 5 small sticky notes. **Choose ONE** of the following questions. Then, ask everyone to write down their answers **(one value per sticky note):**

- Identify up to 5 behaviors you see every day that are key to your success with your customers, with your team, and as an employer. *e.g., Approachable: ask for feedback and be open to suggestions.*

- If you were hiring for a position on your team, what character traits would a candidate need to demonstrate to be a good fit for the organization? *e.g., Detail oriented: know that details make the difference.*
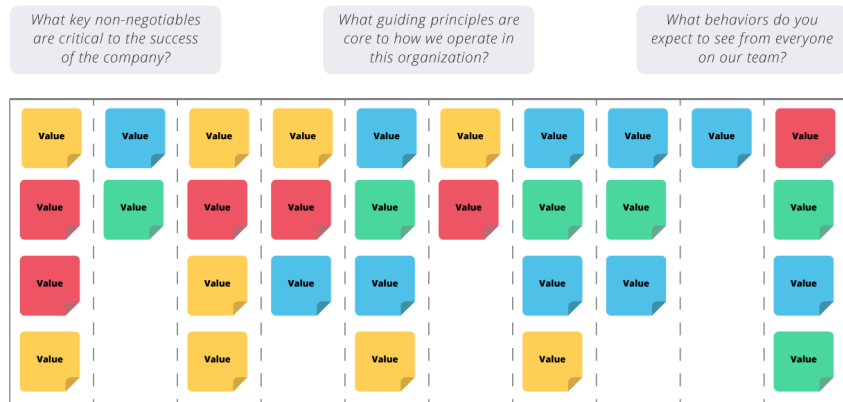
👍 **Pro Tip: Identify current values, don't create aspirational values.** Your values statements should reflect current behaviors you consistently see and are critical to your culture.

Step 2: Present and Organize

Ask one person to report out first by placing the sticky notes horizontally on the whiteboard or wall.

Ask each person in the room to add their values under an idea that is already on the wall. If a new value or theme is created, add a new column. As you discuss and add sticky notes, it should begin to look like this:
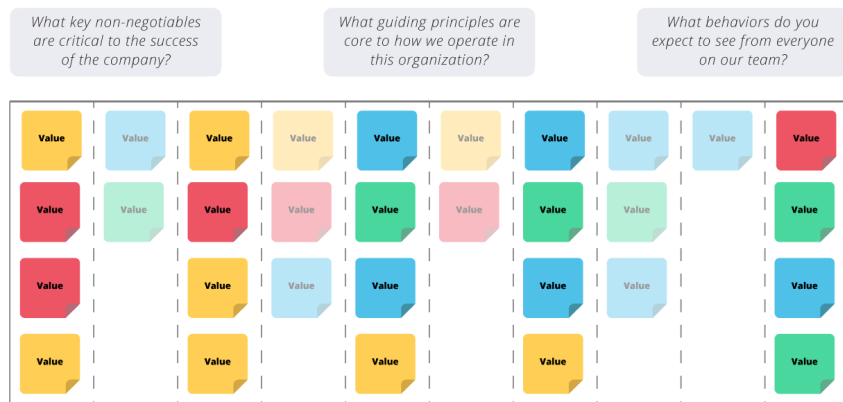
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What key non-negotiables are critical to the success of the company?

What guiding principles are core to how we operate in this organization?

What behaviors do you expect to see from everyone on our team?

What key non-negotiables are critical to the success of the company?				What guiding principles are core to how we operate in this organization?				What behaviors do you expect to see from everyone on our team?	
Value	Value	Value	Value	Value	Value	Value	Value	Value	Value
Value	Value	Value	Value	Value	Value	Value	Value		Value
Value		Value	Value	Value		Value	Value		Value
Value		Value		Value		Value			Value

Step 4: Choose Values Based on Themes

Based on the values that have the most sticky notes, choose those as the core values of the organization. From your board, it will be easy to see which values are mentioned the most.
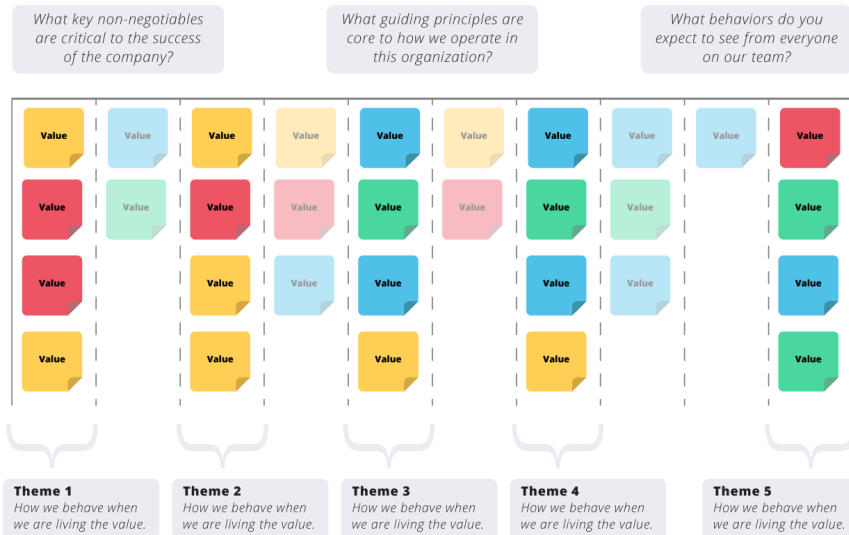
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Value	Value	Value	Value	Value	Value	Value	Value	Value	Value
Value	Value	Value	Value	Value	Value	Value	Value		Value
Value		Value	Value	Value		Value	Value		Value
Value		Value		Value		Value			Value

Step 5: Discussion on Themes

For each value, quickly discuss "how we behave when we are living the value." Capture this information on the whiteboard.

Identify Your Core Values

What key non-negotiables are critical to the success of the company?

What guiding principles are core to how we operate in this organization?

What behaviors do you expect to see from everyone on our team?

Theme 1
How we behave when we are living the value.

Theme 2
How we behave when we are living the value.

Theme 3
How we behave when we are living the value.

Theme 4
How we behave when we are living the value.

Theme 5
How we behave when we are living the value.

👍 **Pro Tip: If it's a one-word value, e.g. "Approachable," describe what behavior your team expects to see when that value is in play.** An example behavior of being *approachable* might include: *asking for feedback and always keeping our minds open to suggestions.*

Step 6: Draft Your Values

Assign someone to draft the values statements similar to that of the Zappos structure: core value theme and 1 or 2 sentences explaining the behaviors.

👍 **Pro Tip: Take the writing offline.** Spending time wordsmithing as a group is not a good use of your time.

Evaluation: Did You Get It Right?

- Are these non-negotiables in how you operate?

- Do these values clearly express how you expect your team to behave to be successful?

Values Facilitation

Have each team member complete a row in this table with their behaviors.

1 Identify Behaviors
Identify up to 5 **behaviors** you see every day that are key to success with your customers, with your team, and as an employer.

2 Identify the Most Mentioned
The 3-7 most mentioned/popular behaviors are candidates for your core values. Put them in Step 3 on the next page.

Name	Behavior #1	Behavior #2	Behavior #3	Behavior #4	Behavior #5
Name	Behavior #1	Behavior #2	Behavior #3	Behavior #4	Behavior #5
Name	Behavior #1	Behavior #2	Behavior #3	Behavior #4	Behavior #5
Name	Behavior #1	Behavior #2	Behavior #3	Behavior #4	Behavior #5
Name	Behavior #1	Behavior #2	Behavior #3	Behavior #4	Behavior #5
Name	Behavior #1	Behavior #2	Behavior #3	Behavior #4	Behavior #5
Name	Behavior #1	Behavior #2	Behavior #3	Behavior #4	Behavior #5
Name	Behavior #1	Behavior #2	Behavior #3	Behavior #4	Behavior #5
Name	Behavior #1	Behavior #2	Behavior #3	Behavior #4	Behavior #5
Name	Behavior #1	Behavior #2	Behavior #3	Behavior #4	Behavior #5

OnStrategy | Values Canvas

3 Evaluate Your Selections

Ensure each selected behavior satisifes the checklist. If it satisfies the checklist, move on to step 4-5.

4 State the Value

Articulate the behavior as a value.

e.g., Value for "open to feedback" is "Approachable"

5 Describe the Behavior

Define the behavior you expect to see when you embody the value.

e.g., Behavior for "Approachable" is "Keeping our doors open, and soliciting feedback to each other."

Evaluate	State the Value	Describe the Behavior
☐ **Will this behavior guide your critical actions?** ☐ **Is this behavior a non-negiotiable in how you operate?**	*E.G. - Approachable*	*E.G. - We are approachable by keeping our doors open, and by soliciting and providing feedback to each other.*
☐ **Will this behavior guide your critical actions?** ☐ **Is this behavior a non-negiotiable in how you operate?**		
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Need help identifying your values and building a strategic plan? We'd love to help.

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