



Creating Mission, Vision and Values That Matter

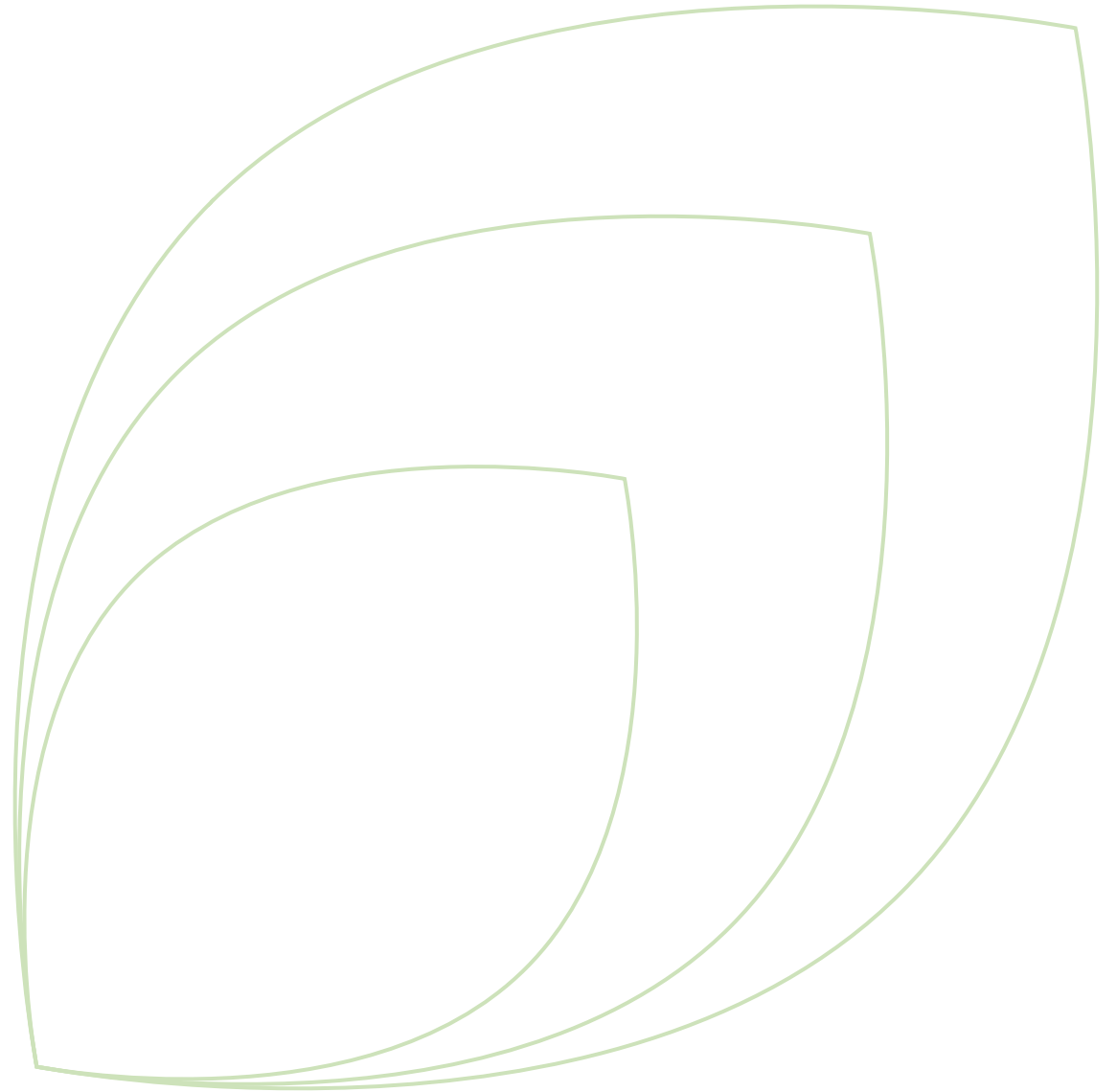
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Welcome!

- Who we are
- Why this matters
- How it fits together
- Best practices



Marry Business & Psychology

- Focus on leadership, strategy and execution
- Specifically, we work in tandem with you to build the people framework, so strategies are turned into daily operational realities
- Offsite Services Sampling:
 - Mission, Vision & Values
 - Objectives and Key Results (OKRs)
 - Enneagram Teambuilding
 - Constructive Conflict
 - Psychological Safety
 - Giving and Receiving Feedback

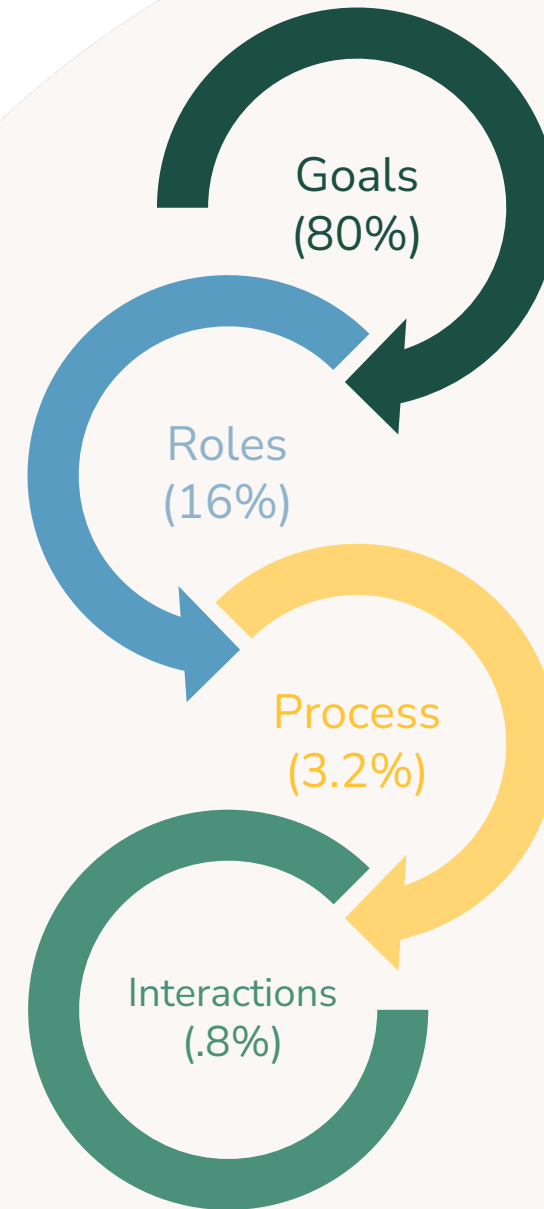


Share your first job, and WHAT
YOU **LOVED** ABOUT IT



Sources of Conflict: GRPI

- Goal Incompatibility
 - Agreed and committed
 - Shared values
- Role Differentiation (Skills, Experience, Perspectives, Information)
 - Clear and defined
- System & Processes
 - Effective meetings, problem solving, decision-making
- Interpersonal Dynamics frame all the other sources of conflict



Mission Statement
is *why* the company
exists and what the
organization is
doing in the
present

Vision Statement is
what the existence
(or world) will look
like in the *future*

Company Values
are deeply ingrained
principles and
beliefs that guide all
of the company's
actions

Strategic Board

Vision

Vision Statement Here

Mission

Mission Statement Here

Values

Grow in Tandem
We grow and develop each other and our clients. Our collaborations are hands-on.

Practical Excellence
Excellent is useful and immediate applicable. We don't let perfect get in the way of great.

We Can Do Hard
We do what it takes to bring out the best in our clients, partners, and ourselves. We embrace holistically on the journey of integration.

Money Matters
Financial investment is a tangible commitment to do impactful and effective work. We ask it of our clients and one another

Flexible Flow
Life is a wild ride, as you to focus on innovation and your core business, we are flexible and show up how we need to.

Strategic Objectives – Theme

#1: Revenue theme

#2: Expansion theme

#3: Customer theme

#4: Internal culture theme

Org Structure

Business Units

US Sales

Int;l Sales

Business Development

Analytics

Engineering

Product

Marketing

Finance

Operations

Supply

OKRS

Will Live in 15Five

Crafting Vision & Mission



Vision Best Practices

- Something no one will argue with, and is also not obvious
- Specific and unique to your company
- Clarifies the purpose for the company
- Creates alignment, provides direction and sets the “North Star”
- Inspiring and motivating
- Short and sweet
- Review every 5 years or if there is a large business event (ex. acquisition, major strategy shift, etc.)



Sustain fulfilling lives on other planets.

Vision Examples – Let's Evaluate

Conceptual (customer, industry or world based)

BBC: “To be the most creative organization in the world”

Disney: “To make people happy.”

Google: “To provide access to the world’s information in one click”

Instagram: “Capture and share the world’s moments”

LinkedIn: “Create economic opportunity for every member of the global workforce”

Microsoft: “To help people throughout the world realize their full potential”

Oxfam: “A just world without poverty”

Shopify: “To make commerce better for everyone”

Tesla: “To accelerate the world’s transition to sustainable energy”

Uber: “We ignite opportunity by setting the world in motion”

Whole Foods: “To nourish people and the planet.”

TED: “Spread ideas”

ChatGPT (Robotics Company): “To revolutionize the way we live and work by developing intelligent and innovative robotic technologies”

Vision Examples – Let's Evaluate

Quality-based (internal focused: products/services provided, culture, operations)

Amazon: “Our vision is to be earth’s most customer-centric company, where customers can find and discover anything they might want to buy online.”

Avon: “To be the company that best understands and satisfies the product, service, and self-fulfillment needs of women—globally.”

Ford: “People working together as a lean, global enterprise to make people’s lives better through automotive and mobility leadership.”

McDonald’s: “To move with velocity to drive profitable growth and become an even better McDonald’s serving more customers delicious food each day around the world.”

Nordstrom: “To serve our customers better, to always be relevant in their lives, and to form lifelong relationships.”

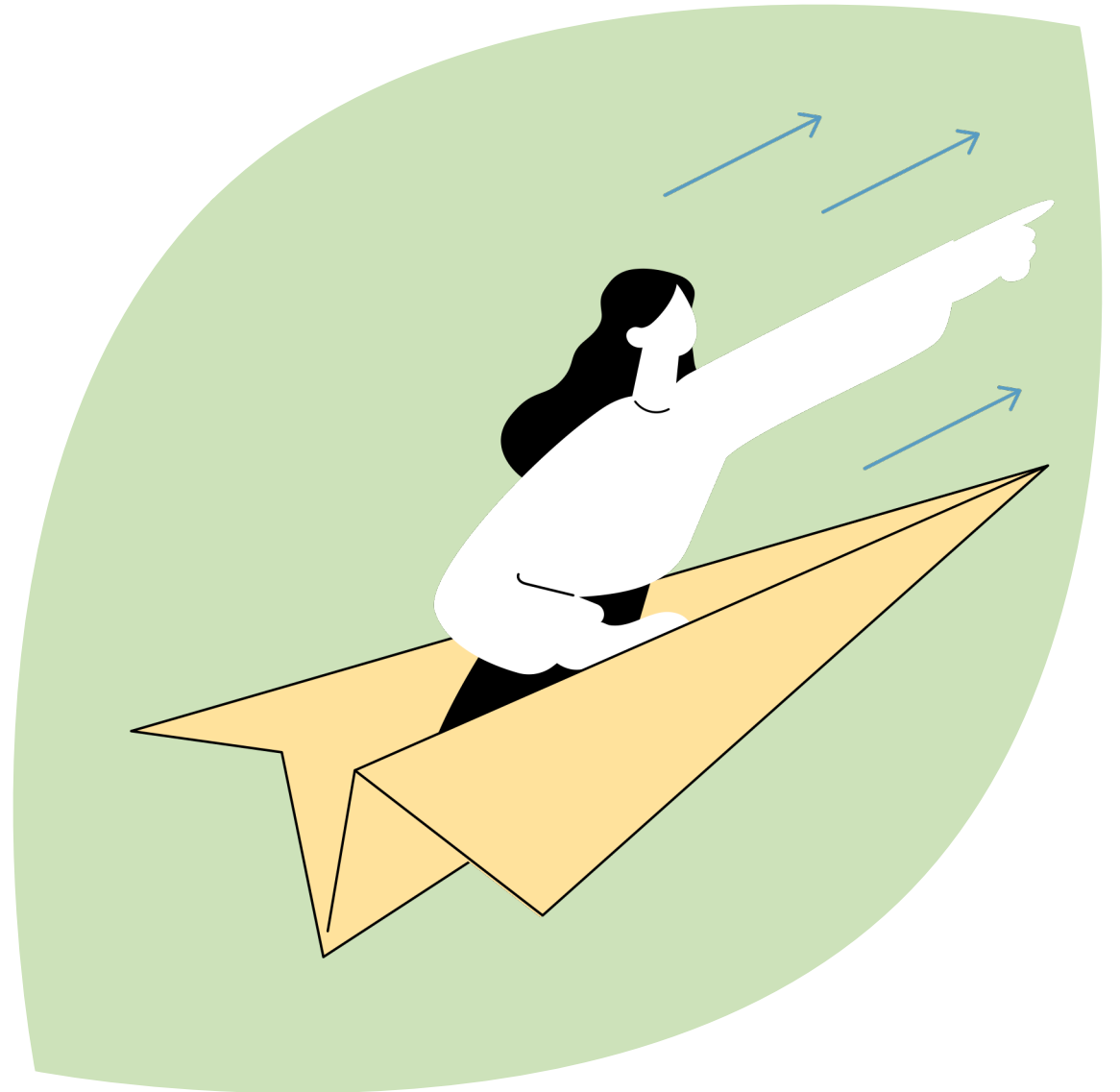
Warby Parker: “We believe that buying glasses should be easy and fun. It should leave you happy and good-looking, with money in your pocket. We also believe that everyone has the right to see.”

Zappos: “To provide the best customer service possible. Deliver 'WOW' through service”

Ben & Jerry’s: “Making the best ice cream in the nicest possible way”

Vision Discussion Questions


- Where do we want our company to go?
- What can we realistically achieve?
- What problem do we intend to solve?
- What are the changes we believe the organization can make for individuals? For the industry?
- How will things be different if the vision is realized?
- What phrases or keywords describe the type of organization and outcome we want?



Mission Best Practices

- Provides sense of focus: What's in scope and out of scope
- Reflects the company's unique selling proposition (say what makes them different)
- Specific and unique to your company. Reflects your personality
- Memorable and Brief – between 1-3 sentences
- Revisit every 3-5 years (as often as two years for start-ups)



To create the reality of life on other planets.  tandemly

Mission Examples – Let's Evaluate

Southwest: “To connect People to what’s important in their lives, through friendly, reliable and low-cost air travel.”

LinkedIn: “To connect the world’s professionals to make them more productive and successful.”

PayPal: “To build the web’s most convenient, secure, cost-effective payment solution.”

Amazon: “To be Earth’s most customer-centric company, where customers can find and discover anything they might want to buy online, and endeavors to offer its customers the lowest possible prices.”

Nike: “Bring inspiration and innovation to every athlete* in the world. *If you have a body, you are an athlete.”

Patagonia: “Build the best product, cause no unnecessary harm, use business to inspire and implement solutions to the environmental crisis.”

David’s Tea: "We're on the ground worldwide in search of well-crafted, single-origin loose leaf teas to share with our North American community. We're pushing limits in new tea frontiers with our blends. We want it to be as easy as possible to discover, explore and feel better through tea.

Campaign Monitor: “We deliver technology that solves complex problems in a beautifully uncomplicated way.”

Cisco: “Shape the future of the Internet by creating unprecedented value and opportunity for our customers, employees, investors, and ecosystem partners.”

Whole Foods: “Our deepest purpose as an organization is helping support the health, well-being, and healing of both people—customers, Team Members, and business organizations in general—and the planet.”

Original Microsoft Mission: “A computer on every desk and in every home”

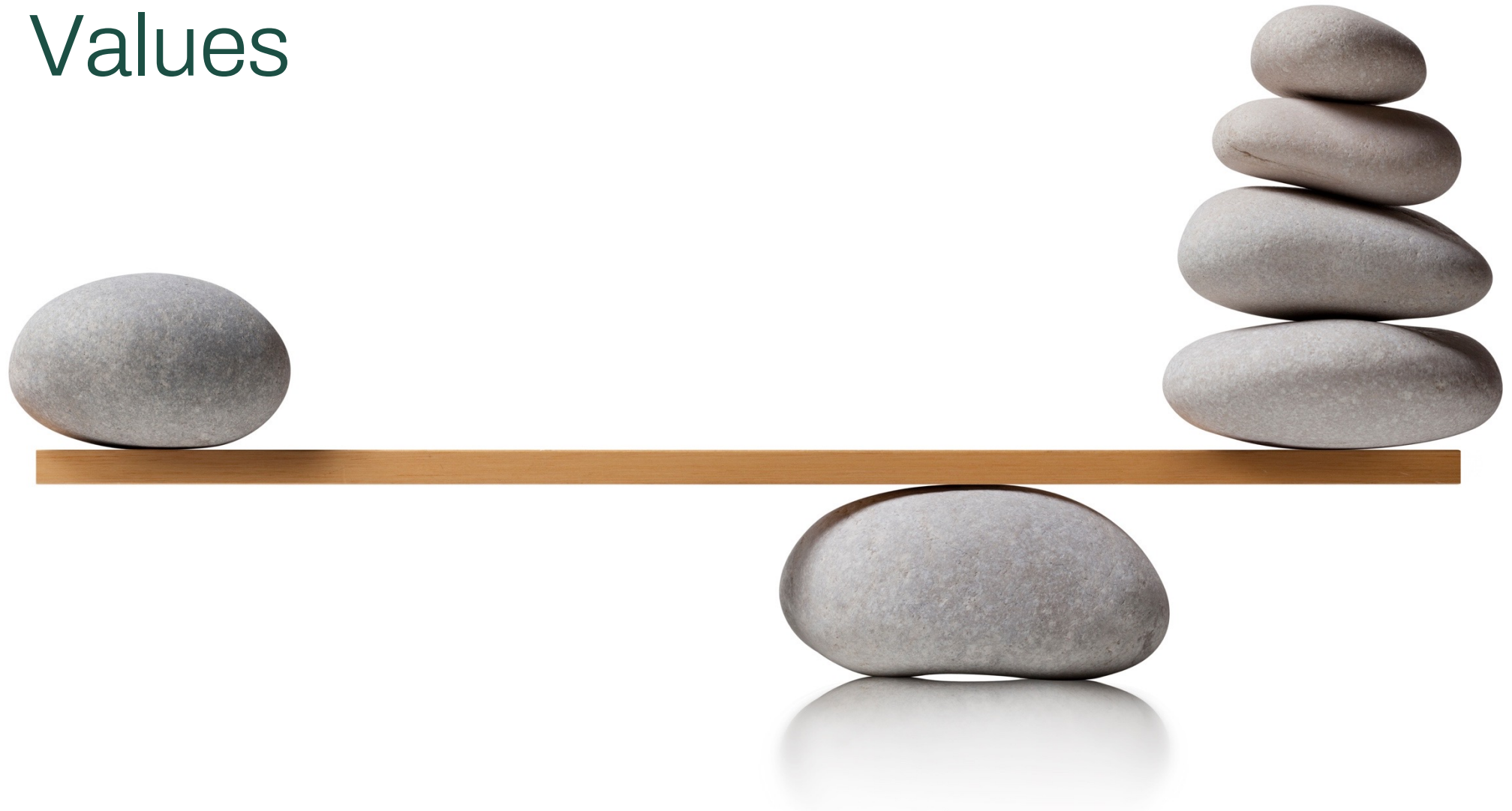
ChatGPT (Robotics Company): To empower people and industries by creating advanced robotic solutions that enhances productivity, efficiency and safety

Mission Discussion Questions

- What is your core business type?
- What are your tangible deliverables?
- What makes your deliverables different?
- What problems do your deliverables solve?
- What benefits do your deliverables provide?
- What is your unique brand proposition?
- What is your brand personality?
- What is your secret sauce?
- What advantages do you have over competitors?
- What are your team members' strengths and secret weapons?
- Who are your target customers?
- What are your general audience segments or personas?
- Do they exist in a particular location or region?



Values



What are Values?

- Personal Core Values are the lens through which we see the world
 - Our root beliefs about how things should be, how we should behave and the way in which we move through our lives
 - Without them present, life is not worth living
 - When we get unreasonably angry, a core value has been violated
- Company Core Values are deeply ingrained principles and beliefs that guide all of the company's actions
- Personal and company values do not have to be exactly the same, but should resonate and not violate one another



Values Excavation Best Practices

- Already exist, goal is to formalize the unspoken rules of engagement
 - Culture is based on the worst behavior it will allow, the values are the guardrails
- Unique to your company
- Should be practical and useful every day
 - Create clear expectations, decision making tools, hiring guides, employee development plans, etc.
- No more than 3-5
 - One can be aspirational, as long as it is identified as such
- Vital for senior leadership to speak and live the values
- Revisit every 3-5 years (as often as two years for start-ups)



Value Skill – Levels of Listening

Level One

- Content
- Plot
- Details
- Identify Problems
- Formulate Solutions



Level Two

- Themes
- Values
- Whole person
- What matters most
- Being (not solving)



Values Behaviors

Define the behaviors/actions that would show that value in action

Zappos

Embrace and Drive Change

Ask yourself:

- How do you plan and prepare for change?
- Do you view new challenges optimistically?
- Do you encourage and drive change?
- How do you encourage more change to be driven from all areas of the organization?
- Are you empowering your fellow circle members to process their tensions, improve the structure of their circles by bringing issues to governance meetings, and to drive change?

Sample Behaviors:

- Drives original thinking
- Challenges the status quo or common wisdom
- Is comfortable with chaos and uncertainty
- Experiments with new ideas before going all in. Bullets versus cannonballs.

Brene Brown Insights

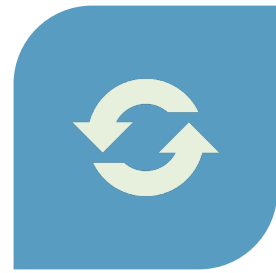
Building Trust

- I choose to practice my values rather than simply professing them.
- I do what I say I am going to do.
- I don't overpromise and I'm able to deliver on commitments and balance competing priorities.
- I own my mistakes, apologize, and make amends.
- I respect professional boundaries, and when it's not clear about what's okay and not okay, I ask.
- I'm aware of my competencies and limitations.
- I'm willing to ask for help.
- I'm willing to say no and I ask for what I need.

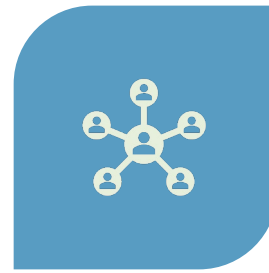
MVV Process



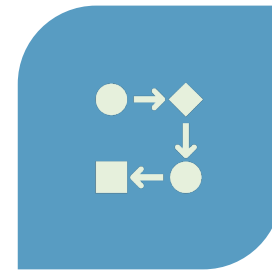
EXCAVATE




REFINE



SOCIALIZE



NORMALIZE

A black metal spiral staircase is shown on the left side of the image, winding upwards. The background is a clear, light blue sky. The text is centered in the right half of the image.

What is one value you will use in decision making this week?



Thank you!



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