DEFINING COMPANY ASPIRATIONS

Clearly define and realize your company's mission, vision, values and priorities

OPENVIEW

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FOREWORD

Building a brand today is very different from building a brand 50 years ago. It used to be that a few people got together in a room, decided what the brand positioning was going to be, and then spent a lot of money buying advertising and telling people what their brand was. If you were able to spend enough money, then you were able to build your brand.

It's a very different world today. With the Internet connecting everyone together, companies are becoming more and more transparent — whether they like it or not. An unhappy customer or disgruntled employee can blog about a bad experience with a company, and the story can spread like wildfire over e-mail or with tools like Twitter. The good news is that the reverse is true as well. A great experience with a company can be read by millions of people almost instantaneously. The fundamental problem is that you can't possibly anticipate every possible touch point that could influence the perception of your company's brand.

For example, if you happen to meet an employee of Company X at a bar, even if the employee isn't working, how you perceive your interaction with that employee will affect how you perceive Company X, and therefore Company X's brand. It can be a positive influence, or a negative influence. But the point is that every employee can affect your company's brand, not just the front-line team members who are paid to talk to customers.

At Zappos.com, we decided a long time ago that we didn't want our brand to be just about shoes, or clothing, or even online retailing. We decided that we wanted to build our brand to be about the very best customer service and experience. We believe that customer service shouldn't be just a single department; it should be the entire company.

Advertising can only get your brand so far. If you ask most people what the "brand" of the airline industry as a whole is (not any specific airline, but the entire industry), they will usually say something about bad customer service or poor customer experience.

If you ask people what their perception of the U.S. auto industry is today, chances are the responses you get won't be in line with what the automakers project in their advertising.

So what's a company to do if you can't just buy your way into building the brand you want? What's the best way to build a brand for the long term?

In a word: culture.

At Zappos, our belief is that if you get the culture right, most of the other stuff — like great customer service, building a great long-term brand, or passionate employees and customers — will happen naturally on its own. Your culture is your brand.

We've formally defined the Zappos culture in terms of 10 core values:

1. Deliver WOW through service
2. Embrace and drive change
3. Create fun and a little weirdness
4. Be adventurous, creative, and open-minded
5. Pursue growth and learning
6. Build open and honest relationships with communication
7. Build a positive team and family spirit
8. Do more with less
9. Be passionate and determined
10. Be humble

Many companies have core values but don't really commit to them. They usually sound more like something you'd read in a press release. Maybe you learn about these values on Day 1 of orientation, but after that it's all just a meaningless plaque on the wall of the lobby.

We believe it's really important to come up with core values that you can commit to. And by commit, we mean that you're willing to hire and fire based on them. If you're willing to do that, then you're well on your way to building a company culture that is in line with the brand you want to build. You can let all of your employees be your brand ambassadors, not just the marketing or PR department. And they can be brand ambassadors both inside and outside the office.

At the end of the day, just remember that if you get the culture and aspirations right, most of the other stuff — including building a great brand — will fall into place on its own.

– Tony Hsieh
  CEO of Zappos.com, Inc.
  New York Times bestselling
  author of *Delivering Happiness*

* The preceding foreword originally appeared on Zappos.com in a post titled, "Your Culture is Your Brand."

01 INTRODUCTION TO COMPANY ASPIRATIONS

It's known as "the domino effect": one object tumbles, and everything else falls into place.

Unfortunately, in life, things are hardly ever this simple — particularly in the business world. It's rarely one thing alone that sets a company on the right path to world domination, but instead a culmination of factors that come together in just the right way. A great product helps, of course, but more than a few businesses with great product ideas have failed to reach their full potential.

So what's the secret?

> "Know your core competencies and focus on being great at them. Pay up for people in your core competencies. Get the best. Outside of the core competencies, hire people that fit your culture but are cheap."
>
> Mark Cuban
> Owner, Dallas Mavericks
> Chairman, HDNet

Talk to leaders from most successful startups, and you'll inevitably find that one of the keys involved having the right group of people, all moving in the same direction toward clearly defined goals. This is where the development of company aspirations comes into play.

The only question is how to get there.

During the early years of a company's life, the founders and senior leaders generally focus on product development and customer development. During this period of formation, the team is working out its basic product, initial value proposition, market focus, and go-to-market approaches. Once the product and customer development has reached a reasonable point of maturity, the team then begins to turn its attention toward company development.

One of the best steps an organization can take at this point is to become an aspirations-driven company (also referred to as mission-driven or vision-driven). An aspirations-driven company is one whose leaders make clear the organization's mission, vision, values, and priorities.

These aspirations, in turn, serve as a guide for all employees and market participants involved with the company.

To be truly effective, aspirations have to be more than just words on paper. The management team must be committed to expressing and living the aspirations on a daily basis. This eBook is designed to show leaders who are ready to identify, express, and live their company aspirations where to begin.

02 COMPANY ASPIRATIONS DEFINED

Put simply, your aspirations are what you aim to be as a company. They are the longest-term and most aggressive goals for your business. Your aspirations can be organized in many different ways, but most frequently are set as your mission, vision, values, and priorities.

The ultimate goal of identifying, expressing, and living your company aspirations is for everyone in and around your organization to embrace and act in a manner consistent with those objectives. Essentially, you reach your aspirations by living your aspirations. As mentioned before, your aspiration goal can be broken down into mission, vision, values, and priority goals.

mission goal

All of the people in your organization understand your company's purpose, and work toward realizing that purpose in their daily work. Essentially, you are answering the question, "Why are we building this organization?"

vision goal

All of the people in your organization understand what you want your company and customer set to "look like" in the long term, and they use this understanding to both motivate and guide their work. Essentially, you are answering the question, "What are we aiming to achieve?"

values goal

All of the people in your organization work in a manner that is consistent with your values and principles. Essentially, you are answering the question, "How should we act?"

priority goal

All of the people in your organization understand your priorities if there is ever any conflict between individual aspirations.

Aspirations serve as a guide to everyone inside and outside of your organization for explaining who you are, where you want to go, and how you're going to get there. But aspirations are a confusing idea in most companies. Some think of aspirations as a poster to motivate employees. Other companies have senior managers who believe that aspirations are for the "troops" but not for them.

These issues, and others, have led the vast majority of companies to develop very poor aspiration practices, and most people to have a general disregard for or disbelief in the practice. Clearly, these approaches do not meet the goals of true aspirations and the poor approaches used by other companies make it much more difficult for you to implement the proper practices.

Company aspirations are often — but should not be — confused with "product aspirations," "brand aspirations," "customer aspirations," "business unit aspirations," "functional aspirations," "employee aspirations" or any other aspirations that can be developed for a specific initiative or around a specific stakeholder. Company aspirations are different in that they are the umbrella over all the other aspirations.

"For young companies, it's critical to build a team with character, core values, and integrity. Find people who have different strengths and experiences than you, but whose styles are complementary. Defining your company mission and values from the start will help ensure that your team remains focused on the company's core vision as your business grows."

Scott Dorsey
CEO, ExactTarget

BUSINESS BENEFITS OF COMPANY ASPIRATIONS

As your company grows, it's important to communicate who you are to new and existing employees and other stakeholders, which company aspirations help you do. Company aspirations help everyone in the company guide their activities, behaviors, and decisions.

When aspirations are well expressed and baked into a company's culture, they help you:
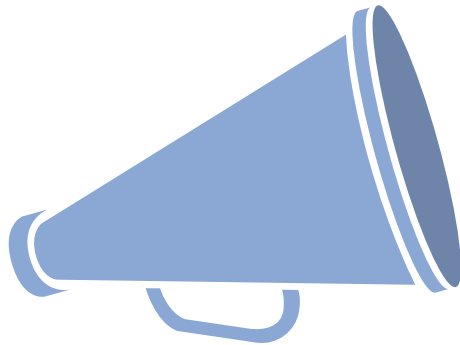
» Hire the people who best fit your aspirations

» Help the "right-fit" people know that you are the best company to work for

» Help the "wrong-fit" people know that your company is not the right company for them

» Inspire your staff

» Separate staff who are not aligned with your aspirations

» Give guidance for the millions of activities, behaviors, and decisions that are made in your company every week

» Enable your product market participants to understand where you're going, why you exist, and what is important to you

» Inspire your product market participants to purchase and use your products and services

An aspirations-driven company gives people, both inside and surrounding the company, extreme clarity on what to expect and what is expected, which helps you accelerate at a higher velocity toward your goals.

03 ASPIRATIONS AS A COMPANY-LEVEL STRATEGY

Aspirations are one of the most important company-level strategies in an organization. Implemented from the top down, aspirations need your careful consideration, execution, continuous reinforcement, and ongoing support if you are going to meet your goal of having everyone in the organization live them out.

Specifically, as the company's senior leaders, you must:

» Identify, agree on, and commit to your aspirations

» Communicate your aspirations to the entire organization

» Live your aspirations

» Help others to understand and live your aspirations

» Measure how well the company aspirations are understood
and used throughout the organization and make adjustments
based on this feedback

» Continuously reinforce your aspirations

To become truly useful, aspirations must become part of your organization's culture. As leaders of your company, you must communicate your aspirations regularly and act as role models by referring to them when you develop strategies, set goals, make decisions, and take action.

The key to setting good aspirations is to keep in mind that they will set the direction and give guidance to the company for a long period of time. However, that does not mean that your aspirations won't change. While aspirations are important to get right from the onset, you also should review and adjust them on an annual basis. During the annual review, most companies will find that their aspirations are pretty well set — perhaps they need to fine-tune the wording, but for the most part, the aspirations are serving the company well.

Other companies will find that they need to adjust and extend their vision. Still others will find that they have grown to the point that they need to bring their aspirations to a new level.

THE INSPIRATION BEHIND COMPANY ASPIRATIONS

Aspirations are about reach and daring. They are about focus and believing.

I find that aspirations can serve as both rudder and sail. For us, they play a huge role in almost everything we do. They shape our thinking, living, working, strategizing, risk-taking, deciding, and doing. We know their power. We trust their worth.

At times, aspirations get a bad rap because of the gaps that can often exist between what people, companies, or websites say, what they do, and who they actually are. Aligning our "words of aspiration" with "our actions and deeds of aspiration" is essential. We believe in realizing what Henry David Thoreau once wrote: "Our truest life is when we are in dreams awake."

Aspirations are about giving yourself and others the permission to not only have a roadmap for working, but for living. They allow individuals to let it rip, to go for it, to be alive, to walk with a bounce in their step, and to look clearly into solutions that are rooted in the fabric of knowing and goodness.

They can inspire a great life (both at and away from work). They invite staff, clients, and stakeholders to the table of empowerment, confidence, courage, and grace. We don't just like aspirations; we've built our business on them.
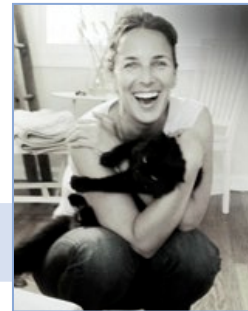
Susan Kerr
CEO, Writer, Advancing Inspiration

04 A THREE-PHASE APPROACH TO ASPIRATIONS

Aspirations can be truly inspirational to your employees, customers, and influential people in your market. That said, as with any management initiative, it takes real work to identify, craft, communicate, and live your aspirations.

We have developed a three-phase approach to help you, described below. But you will still find that it takes real work to create a significant impact. As we reviewed this eBook with our community for feedback, some of the comments that we got back centered on ideas like, "Aspirations are supposed to be inspiring, but your eBook makes it sound like work!" Frankly, it is work. The results are inspirational, but the path to get there takes real work.

If you want more on the inspiration, we highly recommend Tony Hsieh's book, *Delivering Happiness: A Path to Profits, Passion, and Purpose*, or *Behind the Cloud: The Untold Story of How Salesforce.com Went from Idea to Billion-Dollar Company — and Revolutionized an Industry,* by Marc Benioff. Both are great firsthand accounts of how CEOs built significant companies, at least partially by being aspiration-driven. We hope that reading their stories will help give you the inspiration to do the real work.

When you are ready to do the hard work of building your own aspiration-driven company, follow our three-phase approach below and use the templates and workbooks that accompany this eBook. It's hard work, but there is nothing better than being part of a company that is driven by something important. As with all practices, there are many approaches for implementing this practice within your organization. This is the process we recommend:

1. IDENTIFY

2. EXPRESS

3. LIVE AND REINFORCE

IDENTIFY YOUR ASPIRATIONS:
The CEO and senior management team discuss and debate possible aspirations and identify the right set for your company.

EXPRESS YOUR ASPIRATIONS:
The CEO and senior management team communicate the aspirations into the organization.

LIVE AND REINFORCE YOUR ASPIRATIONS:
All of the people in the organization are asked to live the aspirations, and the use of aspirations is measured and reinforced on a quarterly basis.

Each of these phases is discussed in turn, beginning on the following page.

1.
IDENTIFY YOUR ASPIRATIONS

A one-day, off-site meeting is the ideal place to develop your company aspirations. The goal for this meeting is to create your mission, vision, values, and priorities statements. All of the company's senior leaders must be present.

This meeting will be most effective if there is an outside facilitator (someone who is familiar with the topic and is not part of the senior management team); however, many teams have created successful aspirations without the use of a facilitator. The day should be planned out as follows:

STEP 1 **CREATE YOUR MISSION STATEMENT**

Your mission statement presents the broadest and longest perspective of the purpose of your organization (generally, the commitments that you are making to your key stakeholders).

Questions to ask while drafting your mission statement:

» What is the purpose of the organization (i.e., why do you exist)?

» What does the company aspire to be?

» Who are the key stakeholders?

» What promises are you making to the stakeholders?

» How is your company distinguished from all of the others?

» What are the company's limits in terms of products, services, markets, and primary customers?

» What does the company value or prioritize?

Questions to ask about your draft mission statement:

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Does it make the right promises to the most important stakeholders?

» Does it distinguish the company from all others?

» Is it compelling to the key stakeholders (i.e., would you want to work for, be a customer of, or invest in this company)?

» Does it inspire support and ongoing commitment?

» Does it motivate those who are important to the organization's success?

» Can it be shorter?

» Are the verbs proactive?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Will it serve the company well over time (i.e., is it broad enough to allow the company to evolve in the right direction over time)?

» Is it narrow enough to guide the key stakeholders and will it help avoid distractions?

STEP 2   ## DEFINE YOUR VISION

Your vision statement presents a vivid image of your organization's future; it paints a picture of what you intend your company to look like in one to five years or longer. The vivid image serves as a target to help guide overall strategy and strategic and operating decisions, and also serves as a source of inspiration for everyone surrounding the organization.

Some managers tend to be very high-level and esoteric with their attempts at writing a vision statement, while others will try to create too much detail. The best vision statements will be used to identify strategies, so they need to be descriptive enough about the long-term goals for your company, but also as short and concise as possible.

Guidelines for drafting your vision statement:

Describe your future in a way that creates a vivid image.

» What does the organization want to become? (This should stretch your current capabilities but also be achievable.)

» What is your timeline for getting there?

A good pragmatic vision statement:

» Offers measurable long-term goals

» Defines the product-market focus

» Defines your differentiation, how you will be uniquely valuable to your target customers

» Provides a timeline

Questions to ask about your draft vision statement:

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Is it unambiguous?

» Does it describe a bright future for the company?

» Does it stretch the current organization?

» Is it vivid, powerful, valuable, attractive, and inspirational — does it make people feel proud and excited?

» Does it distinguish the company from all others?

» Does it:
  - Quantify the vision?
  - Define the product-market focus?
  - Provide a timeline?

» Can it be shorter?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Is it narrow enough to guide the key stakeholders and will it help avoid distractions?

» Does it align with the company's mission and values?

STEP 3   ARTICULATE YOUR VALUES

Values are important and enduring beliefs or ideals shared by people in the company about what is valuable to consider when making decisions, taking action, and interacting with others. Values exert major influence on individual behaviors and serve as broad guidelines in all situations. Values represent the priorities in a company's culture, including how the employees make decisions and act.

Unlike mission and vision statements, core values are generally more difficult to articulate. It will take significant focus, determination, and several iterations on your part before you are satisfied with the outcome. Also, unlike mission and vision statements, values are written in many different formats and sometimes take several pages to communicate.

Guidelines for drafting your values:

1. What values are important for the long-term success of the business (i.e., what values will give additional guidance to those involved with the company and significantly contribute to the success of the company's mission and vision)?

2. What values are important to the people in the business?

3. Which of the values above are important to develop across the entire organization?

4. Take the values and draft them in a manner that reflects the company's style and personality.

Questions to ask about your draft values:

» Are the values clear and understandable to all stakeholders (i.e., are they easy to grasp)?

» Are they important?

» Are they the minimum necessary to communicate?

» Will they offer guidance to the current organization?

» Will people understand, appreciate, and incorporate them?

» Do they distinguish the company from all others?

» Are they free of jargon and written in a manner that fits the company?

» Can they be easily memorized and repeated?

» Are they narrow enough to help guide the key stakeholders and will they help avoid distractions?

» Do they align with the company's mission and vision and key people in the organization?

FINE-TUNING YOUR ORGANIZATIONAL VALUES

Developing core values can be tricky because you're transferring something that's very personal into a group and business setting. As you work toward developing a values statement for your organization, beware of the personal and emotional connection most of your team members have with creating the values statement.
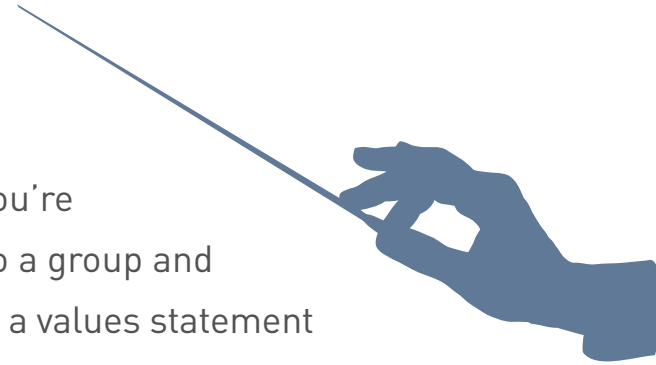
Here are some guidelines:

» One word isn't enough to convey the real meaning of a value.
Create phrases, but not paragraphs.

» Values should be specific, not generic.
More than one word is needed to define specificity.

» Values need to be shared.
Although you don't need consensus from everyone in your organization, you do need agreement from senior management.

» The list should include between five and seven values.
Values need to be memorable to your staff, so having a few statements is better than having so many that nobody remembers any.

You don't set or establish core values; you discover them. Focus on discovering shared values within your organization by starting with individuals' values and moving up to the organization.

Ask the following questions:

» What are the core values and beliefs of our company?

» What values and beliefs guide our daily interactions?

» What are we really committed to?

Developing a set of values is one thing; living by them is something completely different. Having a values statement that's all talk and no commitment undermines your leadership and the management team's credibility.

Erica Olsen
Co-founder and COO, M3 Planning

DEFINE YOUR PRIORITIES

If you mention multiple stakeholders or have other ambiguity in your mission, vision, and values statements, you can clarify your priorities with a priorities statement.

Priorities statements are useful for helping guide decisions when the mission, vision, and values statements do not provide guidance (e.g., when a decision that would be good for one stakeholder would be at the expense of another stakeholder).

Example: OpenView Venture Partners

OpenView mentions portfolio companies, investors, and staff in its mission statement.
The OpenView priority statement clarifies its priorities as follows:

1. Portfolio companies are our first priority

2. Firm/investors are our second priority

3. Individuals are our third priority

You should be able to get your senior management team to a level of agreement on your aspirations (mission, vision, values, and priorities) if you turn off your phones and computers, take out your flip charts, and work collaboratively over the course of one full day.

Once you have general agreement on your aspirations, you can get a good sense of how they sound by asking each senior manager to present them aloud to the rest of the team at the end of the day. This will help you identify and fix any issues, reinforce the aspirations among each member of the senior team, and give everyone practice with presenting the aspirations.

A good way to finish the session is to go around the room and ask if each senior manager is committed to living, communicating, and reinforcing the aspirations with their staff. The process should not stop until you have a full commitment from each of the senior managers.

2.
EXPRESS YOUR ASPIRATIONS

Once you are comfortable that you have created the right set of company aspirations, it's time to communicate them to the entire organization.

Companies have different norms for internal communication, but some of the approaches that we have seen include:

» Presentation by the CEO at a quarterly employee meeting

» E-mail from the CEO to the staff

» Posters, lucites, mouse pads, and other items that are publicly displayed

» Staff meeting presentations from each of the senior managers

» Posting the aspirations on the company Intranet

» Posting the aspirations on the company website and/or in recruiting or corporate communications material

» Presentation by the CEO to the company's board of directors

Your communication will not be complete without communicating to each person in three or more different ways. You cannot over-communicate aspirations, but you can easily under-communicate them, so spend the time to over-communicate!

3.
LIVE AND REINFORCE YOUR ASPIRATIONS

If you have identified and expressed your aspirations, you're off to a good start. However, at this point, your aspirations are just words on a page. If you don't live and reinforce your aspirations, they will never move beyond words to become second nature to your staff.

You have several hurdles to overcome during this phase:

» Most employees won't remember your aspirations even after you communicate them three or more times, perhaps more!

» Many employees won't really understand what your aspirations mean in general

» Many employees won't know how their work relates to your aspirations and probably won't raise their hands and ask questions

» Everyone is busy, and unless the senior management constantly puts aspirations onto the table and into the conversation, everyone will revert back to their day-to-day work

Some vehicles for reinforcing aspirations include:

» Have some smaller team dinners to discuss your aspirations, what they mean, and how each person can live them

» While you are making decisions, bring up the aspirations as the criteria for making the decision
(e.g., when making a decision to work on a particular initiative or hire a particular person)

» Communicate that you are taking certain actions because they are aligned with your aspirations

» Communicate that you are not doing something because it is not aligned with your aspirations

» Give ongoing feedback by praising people who do things that align with your aspirations; conversely, give helpful feedback on different ways of doing things to people who take actions that conflict with your aspirations

» Reinforce all or part of your aspirations at your regular staff meetings

» Discuss how well the group is living the aspirations at your retrospective meetings

» Publicly give praise or a reward to someone who is particularly good at living your aspirations

As you move forward, it will be helpful to have objective measures in place to show how well your company is living the aspirations, and to uncover any areas where you need to make adjustments to your reinforcement activities.

Some ideas for objective measures include:

» Periodically ask your staff to write down the aspirations during company meetings. The first few times, ask them to self-assess their ability to recall the aspirations. Then, have them submit their work so you can look for opportunities to improve.

» Set up a "hall test" — periodically ask people in the hall how they describe your aspirations to people outside of the company. Again, this should reveal some opportunities to improve.

» Send a simple electronic survey to your staff every six months or so. This is a particularly good tool to understand how employees perceive your aspirations. Send out the survey after you first communicate your aspirations in order to get a benchmark for later surveys. Ask your employees:

  - How well they understand your aspirations

  - How well they are currently living each of the aspirations

  - How well others in the organization are currently living each of the aspirations

  - For their recommendations on ways to improve

Living and reinforcing your aspirations is a phase that goes on endlessly, so be prepared to commit to your aspirations for the long haul.

05 ROLES AND METRICS FOR COMPANY ASPIRATIONS

There are three primary roles in a company aspirations practice (this eBook contains checklists to help each of the people involved with the roles to initiate the practice):

1. THE CEO AND EXECUTIVE TEAM

2. THE FACILITATOR OF THE INITIAL WORKSHOP

3. THE ADMINISTRATOR

COMPANY ASPIRATIONS PRIMARY ROLES

1.
CEO/EXECUTIVE TEAM

The CEO and executive team are responsible for 1) defining the mission, vision, values, and priorities, 2) expressing the aspirations, 3) ensuring that all employees understand the aspirations and are aligned, 4) living and reinforcing the aspirations, 5) reviewing the results from the aspirations work and identifying the next set of actions on a quarterly basis, and 6) changing the aspirations when necessary.

2.
FACILITATOR

The facilitator of the initial workshop is responsible for guiding the CEO and executive team during a one-day, off-site meeting to develop the company aspirations and for facilitating the quarterly retrospective meetings.

3.
ADMINISTRATOR

The administrator is responsible for initiating and maintaining the program, monitoring progress, measuring results, and suggesting changes to the CEO and executive team. The administrator could be an executive assistant, someone in marketing, someone in human resources, or anyone else who has an interest and the skills necessary to fulfill the role.

METRICS FOR REVIEWING PROGRESS

Metrics are extremely helpful for tracking performance and gaining insights that will help you improve your company aspiration practice efforts.

The metrics for company aspirations fall under two broad categories:

1. **Company aspirations implementation metrics, which measure whether your employees and other stakeholders understand and are living the aspirations, such as:**

   » The percentage of your employees who accurately communicate your aspirations

   » The rating that your employees give themselves for living out each of the company's aspirations

   » The rating that your employees give others for living out each of the company's aspirations

   » The percentage of your employees who give feedback ideas for improving the company's approach to aspirations (this is a measure of how engaged your employees are with the practice)

   » The number of good ideas coming from employees that the company ultimately implements to help make progress

2. **Company aspirations result metrics, which measure whether the aspirations practice is leading to meaningful improvements to your customer perception, employee perception, and/or business, such as:**

   » Higher employee satisfaction scores (note: this may fall before it ultimately rises as you actively engage in your aspirations practice and remove people who aren't a good fit with the company)

   » Improved customer satisfaction scores

   » Measures that indicate you are closer to achieving your vision

06 COMPANY ASPIRATIONS
CHALLENGES AND SOLUTIONS

"The challenge for most expansion-stage CEOs involves finding the right balance between managing controlled chaos and providing operational structure. Company aspirations provide us with a framework to 1) create a compelling mission and vision that we all believe in, 2) flush out the core attributes/values of our senior leadership, and 3) put into place annual and quarterly milestones that keep us on track. The effect this has had on our organization is amazing to watch and experience. The senior leadership team is consistent in its decision-making process, and we've become much better at hiring top talent. I highly recommend this framework for any CEO that is trying to engineer a truly 'great' company."

Michael Sharma
CEO, Exinda Networks

CHALLENGES AND SOLUTIONS

CHALLENGE #1:

Most companies don't do a very good job developing their aspirations, if they do it at all. Make aspirations a top priority. Arrange to spend one day off-site to develop them, and appoint a facilitator to keep your team on track.

CHALLENGE #2:

You are confusing company aspirations with other aspirations. You can have aspirations for any area of your company — products, business units, marketing, customer satisfaction, etc. However, the most important aspirations will be the company aspirations because they will serve as the overarching force aligning all other aspirations.

CHALLENGE #3:

You already have a mission statement. A mission statement is an important part of the company aspirations practice, but it is only one component. To be as successful as possible, your aspirations must also include a vision statement, a values statement, and possibly a priorities statement. All of the statements must work in harmony with each other.

CHALLENGE #4:

You've already developed your company aspirations; however, it seems that most people in the organization don't understand them, or that it's taking a long time for the employees to model the behaviors. Proper and effective communication is key. Strategize a plan of action for communicating the aspirations and then survey your employees on a consistent basis to assess their understanding. If you've communicated the aspirations and are living out the company's values yourself, be patient. Get into the habit of pointing out when employees' actions are in-line and out-of-line with the company's aspirations and encourage others to do the same. It takes time for the behaviors to become second nature.

CHALLENGE #5:

You've done a good job communicating the aspirations, but there are some employees who just can't seem to get on board. Take an honest look at your own behavior — as the company's leaders, are you living out the aspirations and serving as role models? If so, you may have a human resources issue. Employees who don't base their behaviors, activities, and decisions on your company aspirations — even though they know what those aspirations are — are not a good fit for your organization. Strive to ensure that all future hiring decisions take the aspirations into account. All potential employees should be evaluated for whether or not they can reasonably be expected to respect and live out the company aspirations.

CHALLENGE #6:

You have one or more A-caliber individuals who are not living your aspirations. This is where the rubber meets the road. If you can't get these people to live out your aspirations, you're going to have to weed them out; if you don't, you'll be sending a message to everyone else that you are not serious about the aspirations.

CHALLENGE #7:

You don't have a formal plan in place for revisiting the aspirations. Hold a retrospective meeting each quarter to review the results of your aspirations practice. Come out of the meeting with a clear action plan.

07 GETTING STARTED WITH COMPANY ASPIRATIONS

You can get to the point of expressing your aspirations in one week if you get started today. This eBook contains a number of documents that will help the people in each role perform their activities relatively quickly.

CEO/EXECUTIVE TEAM   FACILITATOR   ADMINISTRATOR

**FOR THE
CEO/EXECUTIVE TEAM**

» Checklist for the CEO/Executive Team (page 31)

» Developing Your Company Aspirations Workbook — for use during a one-day, off-site meeting/workshop

**FOR THE
FACILITATOR**

» Checklist for the Facilitator (page 32)

» Developing Your Company Aspirations: A Facilitator's Guide — for the one-day, off-site meeting/workshop

**FOR THE
ADMINISTRATOR**

» Checklist for the Administrator (page 32)

FURTHER READING

» *The Four Obsessions of an Extraordinary Executive: A Leadership Fable*, by Patrick Lencioni

COMPANY ASPIRATIONS CHECKLIST FOR THE CEO AND EXECUTIVE TEAM

Use this checklist to ensure that this effort will have the greatest probability of success.

Every member of the executive team agrees that:

☐ We have all had a chance to weigh in on the company's aspirations during a full-day workshop and have had a thorough discussion.

☐ Each of us is committed to the company's aspirations.

☐ We have each had a chance to practice communicating the aspirations and are comfortable doing so.

☐ We understand how each of our people can contribute to the company's aspirations and are ready to have conversations with them.

☐ We are committed to living in a manner that is aligned with the company's aspirations.

☐ We have a good plan for communicating and reinforcing our aspirations and are committed to getting all of our employees up the learning curve.

☐ We are open to feedback from others that will help us get better aligned with the company's aspirations.

☐ We will review progress with respect to our aspirations every quarter, and we understand and support the objective measures that will be gathered to gauge progress.

☐ Each of us knows what to do to live and reinforce the company's aspirations.

☐ We have assigned and trained an administrator to ensure that this practice stays front and center and is accurately monitored.

☐ We are ready to go.

COMPANY ASPIRATIONS CHECKLIST FOR THE FACILITATOR

☐ The room, flip charts, pens, Post-it notes, index cards, and other resources are all set for a productive day.

☐ I understand the material and know what we are trying to accomplish during the day.

☐ The team has had a thorough conversation and has clear ideas about their aspirations.

☐ Each of the members of the team is fully committed and aligned with the CEO/executive team checklist.

COMPANY ASPIRATIONS CHECKLIST FOR THE ADMINISTRATOR

☐ The CEO and executive team have completed their checklist.

☐ The management team has a solid communication plan to get all the employees up the learning curve and I will ensure that it is well executed.

☐ I have a clear idea of the measures and measurement frequency that I will be responsible for gathering.

☐ I understand my responsibilities for keeping this practice and its results front and center with the CEO and executive team.

08 SAMPLE ASPIRATION STATEMENTS
OF TOP TECHNOLOGY COMPANIES

1. Microsoft
2. Oracle
3. SAP
4. Infosys
5. Symantec
6. Adobe Systems
7. VMWare
8. CA
9. Intuit
10. Cognizant
11. BMC Software
12. McAfee
13. Check Point Software
14. Salesforce.com
15. Citrix Systems
16. VeriSign
17. SAIC
18. Amdocs
19. Autodesk
20. Red Hat

MICROSOFT ASPIRATIONS

We are committed long term to the mission of helping our customers realize their full potential. Just as we constantly update and improve our products, we want to continually evolve our company to be in the best position to accelerate new technologies as they emerge and to better serve our customers.

www.microsoft.com/about/companyinformation/ourbusinesses/business.mspx, 2009
NOTE: www.microsoft.com/about/diversity/vision.mspx, (Microsoft's Diversity Vision & Strategy), 2009

ORACLE ASPIRATIONS

We will strive to become No. 1 in middleware and No. 1 in applications, just as we've done in data-base. Our goal is to continue to innovate and to lead the industry — while always making sure that we're focused on solving the problems of the customers who rely on our software.

» The agility of a much smaller company

» Gold standard for database technology and applications in enterprise throughout the world

» Innovation drives Oracle's success

www.oracle.com/corporate/story.html, 2009

SAP ASPIRATIONS

Our vision is for companies of all sizes to become best-run businesses. Best-run businesses transform rigid value chains into dynamic business networks of customers, partners, and suppliers. They close the loop between strategy and execution, help individuals work more productively, and leverage technology for sustainable, profitable growth.

This vision is in keeping with SAP's mission to accelerate business innovation for companies and industries worldwide — contributing to economic development on a grand scale.

www12.sap.com/about/vision/index.epx, 2009
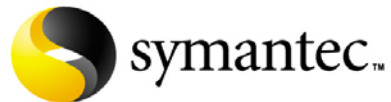
INFOSYS ASPIRATIONS

Vision: To be a globally respected corporation that provides best-of-breed business solutions, leveraging technology, delivered by best-in-class people.

Mission: To achieve our objectives in an environment of fairness, honesty, and courtesy towards our clients, employees, vendors and society at large.

Values: We believe that the softest pillow is a clear conscience. The values that drive us underscore our commitment to:

» Customer Delight – To surpass customer expectations consistently

» Leadership by Example – To set standards in our business and transactions and be an exemplar for the industry and ourselves

» Integrity and Transparency – To be ethical, sincere and open in all our transactions

» Fairness – To be objective and transaction-oriented, and thereby earn trust and respect

» Pursuit of Excellence – To strive relentlessly, constantly improve ourselves, our teams, our services and products to become the best

www.infosys.com/about/who-we-are/default.asp, 2009

SYMANTEC ASPIRATIONS

Corporate responsibility at Symantec is intertwined with the company's core purpose of securing and managing your information-driven world. We define corporate responsibility as the way in which we fulfill this purpose: with full attention and respect to ethical operation, the environment, and commitment to positive societal impact.

As we've grown, we have maintained our focus on our core values of innovation, action, customer-driven, and trust. We believe that by living these values, we create a corporate culture that enhances teamwork, promotes honesty, builds respect for the individual, and provides reward for innovation and creativity.

Our values also prime us to achieve our strategic imperatives to:

» Outperform the competition,

» Create lasting customer and partner loyalty, and

» Create a high-performing and innovating company

www.symantec.com/content/en/us/about/media/SYM_CR_Report.pdf, (2008 Corporate Responsibility Report), 2009

ADOBE ASPIRATIONS

Adobe's mission is to revolutionize how the world engages with ideas and information. For businesses and organizations, engaging customers has never been more critical to their bottom line. Expectations are high, competition is fierce, and consumers have unprecedented control over how they spend their time and money.

At Adobe, we develop the technologies that transform ideas and information into experiences that change how people live, work, and communicate. For over 25 years, we've built a legacy of innovation. Today we remain committed to enabling our customers to better engage their customers and consistently exceed their expectations. By creating strong bonds through engaging experiences, companies get beyond customer satisfaction and brand loyalty to form profitable long-term relationships.

www.adobe.com/engagement/, 2009

VMWARE ASPIRATIONS

Our vision: Transform computing through virtualization

Our belief: Impossible without you

Our values:

» Excellence and innovation

» Straightforwardness and open communications

» A sense of fun and an appreciation of a balanced life

» Delivery on our promises to our partners, our customers and ourselves

» A passion for what we do and the value we deliver

www.vmware.com/company/jobs/culture.html, 2009

CA ASPIRATIONS

Mission: We can help you unify and simplify the management of your IT. We call this industry vision Enterprise IT Management, or EITM. A holistic approach, EITM is designed to solve your critical IT needs — at your own pace, on your own path, with your existing technology and partners.

Values: CA's Core Values are at the heart of our company's culture and guide our behavior each and every day. They comprise an important message to our community. As a company and as a team, they inspire us, motivate us and drive us to greater heights of success. What this means is that we work harder to ensure our customers' success.

As the company uniquely poised to transform the way the world manages information technology, we are committed to the community, our customers, our employees, our shareholders and our partners.

We are a team that delivers for you by living these Core Values:

Innovation – We are constantly looking for ways to innovate and improve. We embrace change as an opportunity.

Excellence – We strive for excellence in all we do. We have a passion for continuous quality improvement. We measure what counts and take action based on facts.

Teamwork – We communicate actively and openly. We build trust by honoring our commitments. We show respect for each other and value diversity.

Integrity – We are honest in all interactions. We earn our reputation by adhering to the highest ethical standards and conduct.

Performance – We recognize and reward outstanding performance. We hold ourselves accountable for achieving our goals.

Our values are framed by:

» Our Customers: We are in business to deliver superior value to our customers.
» Our Shareholders: As a result, we deliver superior returns to our shareholders.

www.ca.com/us/about, 2009

INTUIT ASPIRATIONS

Mission: For 25 years, Intuit's mission has been to revolutionize people's lives by solving their important business and financial management problems.

Whether helping to balance a checkbook, run a small business or pay income taxes, we believe our innovative solutions have simplified millions of people's lives.

Solving important business and financial management problems is still our goal. We are finding new ways to solve them in an Internet-connected world, where emerging technology and market trends are changing the way people live and work. As a result, we are acquiring new customers, connecting them to our solutions, and helping them communicate in new ways with each other and with us. We are doing this in a global environment, where our customers' personal and professional lives often transcend geographic borders.

As we begin this new chapter, our mission is simple: We seek to be a premier innovative growth company that empowers individuals and businesses to achieve their dreams.

http://files.shareholder.com/downloads/INTU/590686812x0x251878/6390653A-08DF-46E5-B256-B26B5D6D0463/Intuit_2008_Annual_Report.pdf, 2009

Intuit's Values:

1. Integrity Without Compromise: We hold ourselves and each other to the highest standards in all we say and do. Our actions and communications are always direct, honest, and transparent.

2. Delight Customers: We put customers at the heart of everything we do. We work together to deliver end-to-end experiences so profound that customers love using our products and services, and actively recommend them.

3. It's the People: We are high-performing people who achieve great things. We embrace personal growth and development, diversity, and teamwork.

4. Innovate and Improve: We innovate to drive growth, and continuously improve everything we do. We move with speed and agility, and embrace change. We have the courage to take risks, and grow by learning from our successes and failures.

5. Own the Outcome: We are accountable for our behaviors, actions, and outcomes. We all own the success of the team, and take personal responsibility for delivering great results.

6. We Care and Give Back: We give back to our communities and the environment. We enable our people to participate and collectively have meaningful impact.

http://about.intuit.com/about_intuit/operating_values/, 2010

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COGNIZANT ASPIRATIONS

Every application we develop, every challenge we embrace, every investment in new resources, every recommendation we make – is dedicated to one goal:

Making our customers' businesses stronger by empowering them to be more responsive to their customers and to the competitive environment.

We'll achieve this by focusing on the intersection of our clients' emerging needs and the acceleration of business and technological change. Our commitment to innovation keeps us focused on the future and being ready at every level to service change.

A Passion for:
  » Strategic Partnership
  » Specialized Expertise
  » Leadership and Innovation
  » Seizing Global Opportunities
  » Embracing Change

http://www.cognizant.com/html/aboutus/landingpage.asp, 2009

BMC ASPIRATIONS

Company Mission: To be the leading provider of enterprise management software solutions by helping customers align their IT infrastructure with their business.

Values:
- » Get it done
- » Do it right
- » Be a customer advocate
- » Hire the best and trust them
- » Innovate at all levels
- » Straight talk

www.bmc.com/BMC/Common/CDA/hou_Page_Generic/0,3465,10651123_10651688,00.html, 2009

MCAFEE ASPIRATIONS

Mission: McAfee proactively secures systems and networks from known and as yet undiscovered threats worldwide. Home users, businesses, service providers, government agencies, and our partners all trust our unmatched security expertise and have confidence in our comprehensive and proven solutions to effectively block attacks and prevent disruptions.

Values: We are committed to holding the highest ethical standards. Our business relationships with customers, shareholders, employees, suppliers, and local communities must always be built on a foundation of integrity and trust. We call this commitment "Ethics First" — doing the right thing at all times in all circumstances in connection with our work at McAfee.

www.mcafee.com/uk/about/corporate/ethics_first.html, 2009

CHECK POINT ASPIRATIONS

Mission: Making Internet communications and critical data secure, reliable and available everywhere has been and continues to be our ongoing vision. We are committed to staying focused on real customer needs, to developing new and innovative security solutions and to keep redefining the security landscape.

Core Values:
» Excellence and Leadership
» Commitment
» Openness
» Integrity
» Partnership and Teamwork

www.checkpoint.com/corporate/jobs/index.html, 2009
www.checkpoint.com/corporate/corporate.html, 2009

SALESFORCE.COM ASPIRATIONS

Salesforce.com is the worldwide leader in on-demand customer relationship management (CRM) services. More companies trust their vital customer and sales data to salesforce.com than any other on-demand CRM company in the world.

Perhaps it's because we deliver integrated, completely customizable enterprise applications for companies of all sizes.

At salesforce.com, equal talent always means equal opportunity.

www.salesforce.com/company/, 2009
www.salesforce.com/company/careers/, 2009
www.salesforce.com/foundation/, (social mission) 2009

CITRIX SYSTEMS ASPIRATIONS

Our Vision: A world where anyone can work and play from anywhere.

Corporate Mission: To make every organization an on-demand enterprise where information is securely, easily and instantly accessible from anywhere, using any device.

Citrix enables people to securely, easily and instantly access the on-demand enterprise from anywhere, anytime, on any device over any connection.

http://phx.corporate-ir.net/phoenix.zhtml?c=102893&p=irol-homeProfile, 2009
http://citrix.com/lang/English/aboutCitrix.asp?ntref=3_nav, 2009
http://www.citrix.com/English/SS/supportThird.asp?slID=4758&tlID=23661, (additional value proposition statements), 2009

VERISIGN ASPIRATIONS

Mission:

VeriSign's mission is to create and operate transformational infrastructures that become indispensable to society

VeriSign, Inc. operates intelligent infrastructure services that enable and protect billions of interactions every day across the world's voice and data networks.

For more than 10 years, VeriSign Internet infrastructure has been at the very heart of the Internet, enabling key transactions and protecting valuable data.

www.verisign.com.au/press/2006/20060713.shtml, 2009
www.verisign.com/corporate/information/index.html, 2009

Values: For our company, it isn't only about getting the results; it's also about how we achieve them. We believe that the journey is just as important as the destination, and our values, Respect, Accountability, Passion, Integrity and Drive (RAPID), reflect that.

At VeriSign, we respect people, first and foremost, as individuals. We treat others as we ourselves would like to be treated. We hold ourselves accountable and accept responsibility in everything that we do. With great passion, we bring a contagious enthusiasm to our pursuit of greatness. We exercise integrity in all aspects of our business. And with ferocious drive, we take the initiative to carry out all actions with exceptional execution by acting decisively and always aiming to win as a team.

www.verisign.com/careers/values/index.html, 2009

SAIC ASPIRATIONS

We, as Science Applications International Corporation Employees, are dedicated to the delivery of quality scientific and technical products and services contributing to the security and well-being of our communities throughout the world. We believe high ethical standards are essential to the achievement of our individual and corporate goals.

Mission:

» SAIC is a company of people dedicated to delivering best-value services and solutions based on innovative applications of science and technology.

» We commit to exceeding our customers' expectations for quality, responsiveness, and professional excellence while delivering within the agreed price and schedule.

» We maintain the highest standards of ethical behavior and professional integrity.

» We employ people of exceptional creativity, expertise, and determination who work closely with one another and with our customers.

» We pursue technical growth and market diversification to increase value for our customers and opportunity for our employees.

» We motivate and reward outstanding performance through our stock ownership system.

» We foster a working environment that encourages technical objectivity, professional and financial growth, and entrepreneurial freedom.

Values: How we achieve our mission is as important as the mission itself. Here are SAIC's core values that are the guides by which we navigate:

» Technical and Professional Excellence – We want to perform superior scientific and technical work. We demonstrate thought leadership and innovation through world class science, engineering and technology. We attract and develop leaders in their fields and encourage them to build businesses.

» Customer Success – We define our success by our customers' success. We are committed to delivering quality, meeting expectations and satisfying customers.

» Ethics and Integrity – Ethics is our foundation and constant commitment — unchanging and unwavering. We are accountable to lead by example and uphold the highest standards of integrity.

» Entrepreneurial Freedom with Responsibility – Our employees are empowered to be entrepreneurs, and to take balanced risks. SAIC provides employees with the freedom to pursue their interests and professional careers. We are responsible for successfully executing our business.

» Culture of Ownership – Our employee ownership culture is the cornerstone of SAIC. Employees who act like owners contribute significantly to our success. Ownership builds employee satisfaction, commitment and retention — and these attributes are directly linked to customer satisfaction and a long term career at SAIC.

» Importance of the Individual – SAIC's people are our most important asset — we hire those with high capability and potential. We value the skills and expertise of a diverse work force. We strive to provide each person with the freedom to grow personally and professionally. We have a say in the management of our Company.

www.saic.com/about/mission.html, 2009

amdocs

AMDOCS ASPIRATIONS

Mission: To help the world's leading providers of wireline, wireless, broadband cable and satellite services to deliver an experience that truly makes a difference.

Our vision is that over time, the impact of our values on how we do things around here will be felt in every corner of Amdocs, and across our entire industry.

We believe that, when it comes to thriving in the converged, digital communications market, the difference is the experience: both the customer experience a service provider creates and the unique depth of experience a technology partner can deliver. Our deep roots in the communications industry give us deep insight into what it takes to build stronger, more profitable customer relationships.

» Make it personal. Cultivate a deep understanding of customers and reflect that knowledge in a customer experience that's finely tailored to them.

» Make it predictable. Every interaction is simple and consistent; customers are shielded from the complexity of service delivery, enjoying a seamless and reliable connection with their lifestyle-enabling services.

» Make it profitable. Customers derive high value from the services they use, and generate higher average revenue. Service providers and their third-party partners also earn higher return on well-orchestrated systems and business processes.

Values:

Amdocs has declared six company values. We chose these values because, working together, they best outline the characteristics of the kind of company we want to be. They are:

1. Customer-centered – We are fully committed to true customer satisfaction and success, which leads to long-lasting partnerships.
2. Collaboration – Each of us has individual strengths and weaknesses. By acting together in synergy, we contribute as a whole to our common goal.
3. Efficiency & Effectiveness – We strive to maintain a lean organization, lowering the total cost of ownership and providing real value to our customers.
4. Excellence – We continuously strive for excellence by "raising the bar" and delivering the very best to our customers.
5. Care – We are a people oriented business. We genuinely care for each other.
6. Growth – New sales are the lifeline of our company, ensuring longevity and prosperity for all stakeholders

www.amdocs.com/Site/Vision/Vision.htm, 2009
www.amdocs.com/Site/Careers/Culture/Our%20Values.htm, 2009
www.amdocs.com/Site/About/About+Amdocs.htm, 2009

Autodesk®

AUTODESK ASPIRATIONS

Mission: Autodesk continues to develop products to support our customers' success. Only Autodesk delivers technology that is accessible and affordable for a global community Our vision is to provide the solutions that allow our customers to realize their ideas. Our strategy is to empower our customers with innovative software and services that inspire their creativity and bring their ideas to reality.

Values:

» Quality – We insure our own work is of the highest quality. We give our internal and external customers the best products and services. We understand the tension between quality and speed, and do our best to insure the best balance for each situation.

» Honesty – We are open, truthful and direct in our communication with one another — even if the message is difficult to deliver. We speak up and will challenge the status quo. We are honest in our dealings with our customers and partners and bring a sense of integrity to all of our relationships.

» Accountability – We make and keep our commitments. We admit when we make a mistake. We follow through. We temper stretch goals with what is really possible, saying no when we need to.

» Fast – We have a sense of urgency about our work. We use the right decision making style for the situation and don't get bogged down with unnecessary group decisions. We identify and implement ways to get things done more quickly and more productively. We eliminate unnecessary work.

» Flexible – We are open to new ways of getting things done at organizational and individual levels. We explore new ideas and experiment. We continue to learn about our products, our customers and ourselves. We adapt to changes outside our control and recognize change is a constant.

» Teamwork – We work with others on tasks to improve results. We express an interest in how others are doing and help one another out. We talk about the team's performance and do our part to improve what we can. We are committed to the success of others across the organization.

» Risk-taking – We take risks to make the company more profitable. We reward those who try something and learn from it as well as those who succeed. We embrace change. We actively explore new ways to make the business, department and ourselves…successful.

» Respect – We actively seek out and listen to other points of view. We consider others and how they would want to be treated in our interactions. We value diversity and individuality. We give timely feedback to one another to help each other succeed.

http://usa.autodesk.com/adsk/servlet/index?siteID=123112&id=848774, 2009
http://usa.autodesk.com/adsk/servlet/index?siteID=123112&id=848778, 2009
http://usa.autodesk.com/adsk/servlet/item?siteID=123112&id=848761, 2009

RED HAT ASPIRATIONS

Mission: To be the catalyst in communities of customers, contributors, and partners creating better technology the open source way.

Values:
Courage, freedom, commitment, accountability.

We have the courage to challenge traditional ideas when we think we have a better one, and we have the freedom to act on our convictions. With this freedom we must always have the commitment to follow through with our goals. And we are accountable in everything we do to our customers, shareholders, partners, and the open source community.

Vision: To become the defining technology company of the 21st century, and through our actions strengthen the social fabric by continually democratizing content and technology.

http://jobs.redhat.com/life-at-red-hat/our-culture/, 2009 (for more information on values)

WHAT REALLY MATTERS

A Guide to Defining and Realizing Your Company's Aspirations

TABLE OF CONTENTS

PRE-WORK: PREPARING FOR THE OFF-SITE MEETING

Prior to the off-site meeting, read through this entire book so you will be familiar with it.
Use the following checklist prior the meeting:

Pre-meeting communication

» Finalize and communicate the agenda to all participants in advance

» Send out directions to the venue

» Ask/note contact information of key logistical persons at off-site venue

» Coordinate participants' traveling schedules, ensuring ample "huddle" time before the workshop starts, and enough time for workshop to be wrapped up properly

Supplies

» Make sure you have the right number of "Developing Your Company Aspirations" workbooks for attendees

» Flip charts

» Easels (there should be enough space to put up 3-4 flip charts at any time, including easels and wall space)

» Markers: Dry-erase markers (different colors), whiteboard eraser, permanent markers

» Pencils and pens

» Notepads

» Plenty of index cards (1+ stacks for each participant)

» Stacks of Post-it notes (of different sizes)

» Masking tape (several rolls of the type that is safe on walls)

» Scissors

Equipment

» Extension cords and outlet hubs (enough for all participants for their laptops)

» Ensure that Wi-Fi connection is available and operational

Venue

» Chairs (have some extra chairs for additional participants or to put bags, computers on)

» A table for snacks/food

» Garbage cans (need several to dispose of food and used flip charts)

» Ensure accessibility to the venue (8 a.m. to 6 p.m.)

» Ensure security at the venue

» Directions to the restrooms

Food/meals

» Set the times and find out if there are any special considerations

» Gather all special requests (allergy, religious requirements) before ordering food. Use the following as a guide:
Morning: doughnuts, coffee, bottled water, soda, tea, hot water, sugar/sweetener, milk, napkins
Lunch: sandwiches, pizza, soda, bottled water, coffee, tea, hot water, ice, cookies, brownies, napkins, utensils

FACILITATOR'S GUIDE: WHY WE'RE HERE TODAY

Facilitator's Opening Introduction: You, as the leaders of your company, have gathered today to develop/refine your company aspirations — this is a four-phase process which I will guide you through. During each phase, I will walk you through a series of exercises — some that involve evaluating other companies' mission, vision, and values statements — in order to get you thinking about how you can best craft your own aspirations.

Throughout the day, we will go through four steps (write these steps on a flipchart):

» Step 1: Develop the Mission Statement

» Step 2: Create the Vision Statement

» Step 3: Identify the Company's Values — and develop a Values Statement

» Step 4: If necessary, develop a Priorities Statement

Developing the company aspirations is one of the most important things you can do to promote the future success of your organization and to orient all of your people toward that success. Do all that you can to ensure you devote your full attention to this process throughout the entire day by eliminating distractions and giving this topic your full attention. If each and every one of you do not walk out of the room fully committed to your aspirations, then you will never be able to get your staff fully committed to the aspirations.

We have a few ground rules for the day that we would like everyone to follow:

» Turn off your e-mail, cell phones, and other notification systems...we need everyone's active involvement.

» Everyone in the room has a unique point of view and it is important to engage in a constructive conversation about every point of view in order to get to the best possible answers.

» Everyone needs to be actively involved. We will be taking regular breaks every 90 minutes or so, but if you feel that you are losing focus or need a break, we can stop at any point.

Facilitator: You can create a page for the schedule for the day, but our recommendation is to take breaks when you feel the energy slipping and take a 15-minute break every 90 minutes or so for people to catch up on calls or e-mail.

WHY WE'RE HERE TODAY

Welcome! You are here today to develop your company aspirations — your mission, vision, values, and priorities. This workbook will serve as your guide.

Aspirations are a powerful source of guidance and inspiration for organizations. They help key people inside and outside an organization focus and stay aligned on the right targets, give guidance to the right path and boundaries for achieving the targets, and serve to increase an organization's velocity toward the target.

As your company grows, you need to be able to communicate who you are to new and existing employees and other stakeholders — company aspirations help you do this. Company aspirations help everyone in the company guide their activities, behaviors, and decisions. When aspirations are well expressed and baked into a company's culture, they help you to:

» Hire the people who best fit your aspirations

» Help the "right-fit" people know that you are the best company to work for

» Help the "wrong-fit" people know that your company is not the right company for them

» Inspire your staff

» Separate staff that are not aligned with your aspirations

» Give guidance for the millions of activities, behaviors, and decisions that are made in your company every week

» Allow your product market participants to understand where you are going, why you exist, and what is important to you

» Inspire your product market participants to purchase and use your products.

An aspirations-driven company gives the people, both inside and surrounding the company, extreme clarity on what to expect and what is expected, which helps you to accelerate toward your aspirations and meet your goals!

FACILITATOR'S GUIDE: ASPIRATIONS DEFINED

Begin the discussion by talking about what company aspirations are — and what they aren't. As a group, talk about why aspirations are so important.

Be sure that all participants are clear about why they are here today and that they have the right attitude about the process and the long-term benefits. You may find that some of the participants are extremely cynical; either they haven't experienced the power of aspirations or they've experienced companies that only give lip service to aspirations.

Here are a few important points to make:

Option A

» You can give today a half-hearted effort; if you do, you will not walk away committed to the aspirations, which is a key goal for today.

» You can walk away today committed to the aspirations, but then move on to other things. If so, this will end up having been a wasted day, which, unfortunately, is the case for many companies.

Option B

» You can really engage today and walk away with aspirations that are truly meaningful to each and every one of you and that you really get excited about realizing.

» You can take the results from the day and share your aspirations with your teams.

» You can really think about the things that you do and how you can adjust them to better orient your company toward achieving your aspirations.

» Your enthusiasm for your aspirations can be contagious, and, in turn, your staff will become more engaged in really nailing your aspirations.

» You will then find that you realize your aspirations sooner and better because of this work.

You choose — Option A or Option B? Of course, if any of you choose Option A, then we should all go surfing today as that would be a much better use of our time. If we put in a lousy effort, it will probably be worse than putting in no effort at all, as we'll probably create a lot of cynicism among our staff.

It is really important that you get the management team truly engaged and inspired with the idea that their aspirations can make a real difference in their company, and that writing them down and gaining commitment at the senior management level is simply the first step in getting everyone in the company to the point that they both understand and live the company's aspirations. If they get their minds around this idea at this point in the meeting, they stand a much better chance of succeeding.

openview

ASPIRATIONS DEFINED

What Aspirations Are

Your company's aspirations are what you aspire to be as a company. They are the longest-term and most aggressive goals for your company. Your aspirations can be organized in many different ways, but most frequently are organized as your company's mission, vision, values, and priorities.

The ultimate goal of identifying, expressing, and living your company aspirations is for everyone in and around your organization to embrace and act in a manner consistent with your aspirations, including the millions of small decisions and behaviors that take place on a weekly basis, thereby allowing you to truly reach your aspirations. Essentially, you reach your aspirations by living your aspirations.

Your aspirations goal can be broken down into mission, vision, values, and priority goals:

» **Mission Goal** – All of the people in your organization understand your organization's purpose and work toward meeting that purpose in their daily work.

» **Vision Goal** – All of the people in your organization understand what you want your company and customer set to "look like" longer term and they use this understanding to both motivate and guide their work.

» **Values Goal** – All of the people in your organization work in a manner that is consistent with your values and principles.

» **Priority Goal** – All of the people in your organization understand your priorities if there is ever any conflict between individual aspirations.

Aspirations serve as a guide for everyone inside and outside of your organization for explaining who you are, where you want to go, and how you're going to get there.

What Aspirations Are Not

Aspirations are confusing to a lot of people running emerging growth technology companies. Most of the time we find that aspirations are so confusing and appear so difficult to create that companies tend to avoid them altogether. Some companies think of aspirations as a poster to motivate employees. Other companies have senior managers who believe that aspirations are for the "troops" but not for them. These issues, and others, have led the vast majority of companies to have very poor aspirations practices and most people to have a general disregard for or disbelief in the practice. Clearly, these approaches do not meet the goals of true aspirations and the poor approaches used by other companies make it much more difficult for you to implement the practice of true aspirations.

Company aspirations are often — but should not be — confused with "product aspirations," "brand aspirations," "customer aspirations," "business unit aspirations," "functional aspirations," or any other aspirations that can be developed for a specific initiative. Company aspirations are different in that they are the umbrella over all the other aspirations. They should be aligned, but different.

Facilitator's Guide: Warm-Up Exercise

Ask the group to look over the questions on the Warm-Up Exercise page. Then, ask the questions one at a time — give the attendees time to reflect and then write out their answers. Ideally, each attendee will write their answers on a flip chart or flip-chart page taped to the wall, as the information will be useful at a later point in the meeting and it makes their answers more public and easier to refer to.

When you have finished with all four questions, ask each attendee to stand up and talk about their answers.

Ask them to keep their answers in mind as you progress through each step throughout the day.
The purpose of this exercise is to:

» Warm up the participants and get them engaged in a conversation

» Get them to engage at a personal level on why they are at the company

» Get them to start thinking about how important it is to have uniqueness based on their personal experiences

» Get some thoughts down on paper from this perspective that will be weaved into a later discussion

WARM-UP EXERCISE

Each member of the team should answer the following questions:

Questions	Answers
Why did you join your company (the 1-3 truly important differentiators)?	
What is important to you about your company (the 1-3 truly important things that get you excited)?	
What do you do in your company?	
What is the one thing that is your unique competitive advantage in the company (the one thing that you do uniquely well)?	

FACILITATOR'S GUIDE: CREATING THE MISSION STATEMENT

The team will be creating the mission statement first, as it will serve as the guiding document for the vision, values, and priorities statements.

» Begin the discussion by reiterating the definition of the mission statement:

The mission statement presents the broadest and longest perspective of the purpose of your organization (generally, the commitments that you are making to your key stakeholders).

» Explain to the team that you will begin by reviewing the questions (below) that serve as guiding considerations for drafting a mission statement and for evaluating the draft, and that you will then be evaluating three other companies' mission statements to see where improvements can be made. After that, the attendees will draft their own mission statement, then review, tweak, and finalize it.

» Read aloud the questions below — read slowly to allow time for reflection in between questions.

STEP 1: CREATE YOUR MISSION STATEMENT

Your mission statement explains who you are and what you do. It gives everyone inside and surrounding the company clarity on what is expected and what to expect. Once it is in place, it allows everyone to help keep the company on the intended course and to make course corrections along the way.

Questions to Ask While Drafting

1. What is the purpose of the organization (why do we exist)?

2. What does the company aspire to be?

3. Who are the key stakeholders?

4. What promises are we making to the stakeholders?

5. How do we distinguish our company from our competitors?

6. What are our limits in terms of products, services, markets, and primary customers?

7. What does our company value or prioritize?

Questions to Ask While Evaluating Your Draft

1. Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

2. Does it make the right promises to the most important stakeholders?

3. Does it distinguish our company from all others?

4. Is it compelling to the key stakeholders (i.e., would you want to work for, be a customer of, or invest in this company)?

5. Does it inspire support and ongoing commitment?

6. Does it motivate those who are important to our success?

7. Can it be shorter?

8. Are the verbs proactive?

9. Is it free of jargon?

10. Can it be easily memorized and repeated?

11. Will it serve the company well over time (i.e., is it broad enough to allow us to evolve in the right direction over time)?

12. Is it narrow enough to help guide the key stakeholders and avoid distractions?

FACILITATOR'S GUIDE: EVALUATING MISSION STATEMENTS

It is really important that you get the participants thinking critically about mission statements so they will engage more critically in their own mission statement. It will be a lot easier for them to be critical of other companies' mission statements than to focus on their own, so we've inserted a few mission statements here for you to get started with (feel free to replace these with your own examples — you can find more at www.missionstatements.com). That said, it is not really important what mission statements they use, but rather that they get some practice evaluating and rewriting mission statements.

» Read aloud the sample mission statements. Then, ask each question aloud and give the attendees time to write down their evaluations based on their answers to each question.

» When you are finished, have each of the attendees discuss their answers.

» Next, have each attendee rewrite the mission statement in the space provided. Then have each of them read aloud their revised mission statement. Discuss what is different and why they made the changes that they did. Ask them what positive changes they think will occur as a result of the changes to the mission statement.

» Have each attendee rewrite the mission statement in the space provided, then read aloud their revised mission statement.

» Discuss what is different and why they made the changes that they did. Ask them what positive changes they think will occur as a result of the changes to the mission statement.

EVALUATING MISSION STATEMENTS

Savid Technologies Inc.

Our mission is simple: make technology an asset for your business not a problem. Too many times we have seen other IT consulting firms recommend solutions that are not appropriate for the specific client's business or will not take a business' operations into their planning as they routinely bring down an entire business while they perform routine maintenance on a server; that is unacceptable. We won't bring you down in the middle of the day because it is "a better time for us." We work around your business. We strive to make technology integrate seamlessly with your business so your business can grow. As your technology partner, when your business grows ours will grow with you, therefore, we will work hand in hand with you to support your growth.

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Does it make the right promises to the most important stakeholders?

» Does it distinguish the company from all others?

» Is it compelling to the key stakeholders (i.e., would you want to work for, be a customer of, or invest in this company)?

» Does it inspire support and ongoing commitment?

» Does it motivate the people who are key to the organization's success?

» Can it be shorter?

» Are the verbs proactive?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Will it serve the company well over time (i.e., is it broad enough to allow the company to evolve in the right direction over time)?

» Is it narrow enough to help guide the key stakeholders and avoid distractions?

Insert your evaluation here:

Note: You can find many more sample mission statements at www.missionstatements.com

CAN YOU IMPROVE SAVID'S MISSION STATEMENT?

Insert your revised Savid mission statement here:

Google

Google's mission is to organize the world's information and make it universally accessible and useful.

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Does it make the right promises to the most important stakeholders?

» Does it distinguish the company from all others?

» Is it compelling to the key stakeholders (i.e., would you want to work for, be a customer of, or invest in this company)?

» Does it inspire support and ongoing commitment?

» Does it motivate the people who are key to the organization's success?

» Can it be shorter?

» Are the verbs proactive?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Will it serve the company well over time (i.e., is it broad enough to allow the company to evolve in the right direction over time)?

» Is it narrow enough to help guide the key stakeholders and avoid distractions?

Insert your evaluation here:

CAN YOU IMPROVE GOOGLE'S MISSION STATEMENT?

Insert your revised Google mission statement here:

USight

Our goal is to provide the best products with the greatest service possible.

- » Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?
- » Does it make the right promises to the most important stakeholders?
- » Does it distinguish the company from all others?
- » Is it compelling to the key stakeholders (i.e., would you want to work for, be a customer of, or invest in this company)?
- » Does it inspire support and ongoing commitment?
- » Does it motivate the people who are key to the organization's success?
- » Can it be shorter?
- » Are the verbs proactive?
- » Is it free of jargon?
- » Can it be easily memorized and repeated?
- » Will it serve the company well over time (i.e., is it broad enough to allow the company to evolve in the right direction over time)?
- » Is it narrow enough to help guide the key stakeholders and avoid distractions?

Insert your evaluation here:

CAN YOU IMPROVE USIGHT'S MISSION STATEMENT?

Insert your revised USight mission statement here:

FACILITATOR'S GUIDE: EVALUATING YOUR MISSION STATEMENT

Now it's time for the attendees to evaluate their own mission statement. If the company already has a mission statement, evaluate and revise it:

» Read aloud the questions on page 20, pausing in between each, so attendees can reflect and write notes.

» After the attendees are finished with their own reflection, open up the discussion. Ask everyone to share their thoughts and what they wrote. At this point, take notes on your flip charts for the entire group to see. See if you can discover common areas where the attendees agree.

» Remind attendees to be as open and honest as possible.

» When you are finished with this step, move on to the brainstorming phase so attendees can create their revised mission statement. Ask the attendees: "What are the primary ways you can make your mission statement stronger?"

» If the company does not have a mission statement, lead the attendees through a brainstorming session by asking the questions.

» Go back to page 13 for the master list of questions to ponder while brainstorming the mission statement. Note that many participants get a bit intellectual, work from the head too much, and need to get more heart into their mission statement. They also think that there is a right and wrong answer (there isn't). You need to get them thinking about why they are really spending the majority of their awake life at their company!

It is really important to get the participants to look through their answers to the warm-up exercise questions, particularly those that focus on why they joined the company and what is important about their company. Ask the question: "If these are important reasons for you, shouldn't they be worked into your aspirations?"

EVALUATE YOUR MISSION STATEMENT

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Does it make the right promises to the most important stakeholders?

» Does it distinguish the company from all others?

» Is it compelling to the key stakeholders (i.e., would you want to work for, be a customer of, or invest in this company)?

» Does it inspire support and ongoing commitment?

» Does it motivate the people who are key to the organization's success?

» Can it be shorter?

» Are the verbs proactive?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Will it serve the company well over time (i.e., is it broad enough to allow the company to evolve in the right direction over time)?

» Is it narrow enough to help guide the key stakeholders and avoid distractions?

<div style="border:1px solid #000; padding:20px;">

Insert your evaluation here:

</div>

FACILITATOR'S GUIDE: FINALIZING YOUR MISSION STATEMENT

Prior to crafting the final mission statement, identify the best ideas from the group. Lead the group through the consensus-building process until they agree on all sentences (number of sentences, order of sentences, content) of the final statement.

Prior to writing out the final statement, ask the attendees to ponder — and then discuss — all the ramifications of the new mission statement: What are the positive results that will ensue once the entire organization is using the mission statement to guide them in their daily activities and decisions?

It is really important that the group converges on a solid mission statement over a few iterations. If they are not converging, then it is up to you as the facilitator to help them identify and address the issues so that the impediments to convergence are removed.

Note that some participants will get stuck on getting every last word right, or will not be completely convinced that they have it right. You will need to push past this desire so you can get through the day. Tell them that once they have the rest of the work done, they can go back to wordsmith the aspirations; explain that they'll want to sleep on the results and make tweaks over the next couple of days anyhow, so if it's mostly right at this point, you need to move on to the next section.

CREATE YOUR FINAL MISSION STATEMENT

Insert your revised mission statement here:

FACILITATOR'S GUIDE: DEFINING THE VISION

The team will be creating its vision statement next.

» Begin the discussion by reiterating the definition of the vision statement:

Your vision statement presents a vivid image of your organization's future; it paints a picture of what you intend your company to look like in one to five years or perhaps longer. The vivid image serves as a target to help guide overall strategy and strategic and operating decisions, and also serves as a source of inspiration for everyone surrounding the organization.

» TIP: Some managers tend to be very high level and esoteric with their attempts at writing a vision statement; others try to create too much detail. The best vision statements will be used to identify strategies, so they need to be descriptive enough about the long-term goals for the business, but they also should be as short and concise as possible. Encourage and guide the team to work toward creating a short and concise vision statement that has enough substance to allow people to understand the goals.

» Explain to the team that you will begin by reviewing the questions (below) that serve as guiding considerations for drafting a vision statement and for evaluating the draft, and then you will do a brainstorming exercise to get them thinking. After that, you will be evaluating three other companies' vision statements to see where improvements can be made. Finally, the attendees will draft their own vision statement, review and iterate a few times, and then finalize it.

» Read aloud the questions below — read slowly to allow time for reflection in between questions.

STEP 2: DEFINE YOUR VISION

Your vision statement paints a picture of what you intend your company to look like in 1 to 5 years or perhaps longer. The vivid image serves as a target to help guide overall strategy and strategic and operating decisions, and also serves as a source of inspiration for everyone surrounding the organization. The vision statement needs to be descriptive enough about the long-term goals for the business, but should be as short and concise as possible.

Questions to Ask While Drafting

1. What does our organization want to become? (This should stretch your current capabilities but also be achievable).

2. What is our product-market focus?

3. What are our measurable long-term goals?

4. What is our differentiation? (How will we be uniquely valuable to our target customers?)

5. What is our timeline for getting where we want to be?

6. How can we create a vivid image that will focus people on the right infinite target and inspire them to move the organization in that direction?

Questions to Ask While Evaluating Your Draft

1. Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

2. Is it unambiguous?

3. Does it describe a bright future for the company?

4. Does it stretch the current organization?

5. Is it vivid, powerful, valuable, attractive, and inspirational? Does it make people feel proud and excited?

6. Does it distinguish the company from all others?

7. Does it:
   » Quantify the vision?
   » Define the product-market focus?
   » Give a timeline?

8. Can it be shorter?

9. Is it free of jargon?

10. Can it be easily memorized and repeated?

11. Is it narrow enough to help guide the key stakeholders and avoid distractions?

12. Does it align with the company's mission and values?

FACILITATOR'S GUIDE: BRAINSTORMING EXERCISE

» Have attendees use extra paper to brainstorm as many ways they can think of to make a $10 profit by the end of the day in a new venture. Then have them prioritize their top five ideas.

» Then have them share their best ideas, while you record those ideas on a flip chart.

» After the attendees have described all of their creative and crazy ideas (there should be a lot of good ones), ask them the question: Which of these ideas would make you $100 million?

» They will be a bit confused, but will look through the ideas and conclude that very few, if any, can make you $100 million. Ask them what their conclusion is. They will probably not answer or will give a few ideas. Then tell them that your conclusion is that you can't make $100 million with a $10 vision!

» Tell them to think about this as they go through their vision exercise, as they need to have a really good vision if they want to build a great company!

BRAINSTORMING EXERCISE

Brainstorm as many ways as you can to make a $10 profit by the end of the day in a new venture.
Insert your best five ways in priority order below:

My best ideas for making a $10 profit by the end of the day:

1.
2.
3.
4.
5.

Insert your conclusion here:

FACILITATOR'S GUIDE: EVALUATING VISION STATEMENTS

» Read aloud the sample vision statements on the following pages. Then, ask each question aloud and give the attendees time to write down their answer to each question.

» When you are finished, have the attendees discuss their answers.

» Have each attendee revise the vision statement in the space below. Then have each attendee read aloud their revised vision statement. Discuss what is different and why they made the changes that they made. Ask them what positive changes they think will occur as a result of the changes to the vision statement.

Now it's time for the attendees to evaluate their own vision statement. If the company already has a vision statement, evaluate and revise it:

» Read aloud the questions below, pausing in between each, so attendees can reflect and write notes.

» After the attendees are finished with their own reflection, open up the discussion. Ask everyone to share their thoughts and what they wrote. At this point, take notes on your flip charts for the entire group to see. See if you can discover common areas where the attendees agree.

» Remind attendees to be as open and honest as possible.

» When you are finished with this step, move on to the brainstorming phase so attendees can create their revised vision statement. Ask the attendees: What are the primary ways you can make your vision statement stronger?

» If the company does not have a vision statement, lead the attendees through a brainstorming session by asking the questions on the following page.

» Go back to page 24 for the master list of questions to ponder while brainstorming the vision statement.

It is really important to get the participants to look through their answers to the warm-up exercise questions, particularly those that focus on why they joined the company and what is important about their company. Ask the question: "If these are important reasons for you, shouldn't they be worked into your aspirations?"

EVALUATING VISION STATEMENTS

CIGNA PROPERTY & CASUALTY

To be a top-quartile specialist within five years.

- » Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

- » Is it unambiguous?

- » Does it describe a bright future for the company?

- » Does it stretch the current organization?

- » Is it vivid, powerful, valuable, attractive, and inspirational? Does it make people feel proud and excited?

- » Does it distinguish the company from all others?

- » Does it:
  - Quantify the vision?
  - Define the product-market focus?
  - Give a timeline?

- » Can it be shorter?

- » Is it free of jargon?

- » Can it be easily memorized and repeated?

- » Is it narrow enough to help guide the key stakeholders and avoid distractions?

- » Does it align with the company's mission and values?

Insert your evaluation here:

CAN YOU IMPROVE CIGNA'S VISION STATEMENT?

Insert your revised Cigna vision statement here:

EMC

We believe that information is a business' most important asset. Ideas — and the people who come up with them — are the only real differentiator. Our promise is to help you take that differentiator as far as possible. We will deliver on this promise by helping organizations of all sizes manage more information more effectively than ever before. We will provide solutions that meet and exceed your most demanding business and IT challenges. We will bring your information to life.

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Is it unambiguous?

» Does it describe a bright future for the company?

» Does it stretch the current organization?

» Is it vivid, powerful, valuable, attractive, and inspirational? Does it make people feel proud and excited?

» Does it distinguish the company from all others?

» Does it:
  - Quantify the vision?
  - Define the product-market focus?
  - Give a timeline?

» Can it be shorter?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Is it narrow enough to help guide the key stakeholders and avoid distractions?

» Does it align with the company's mission and values?

Insert your evaluation here:

CAN YOU IMPROVE EMC'S VISION STATEMENT?

Insert your revised EMC vision statement here:

MICROSOFT

Create experiences that combine the magic of software with the power of Internet services across a world of devices.

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Is it unambiguous?

» Does it describe a bright future for the company?

» Does it stretch the current organization?

» Is it vivid, powerful, valuable, attractive, and inspirational? Does it make people feel proud and excited?

» Does it distinguish the company from all others?

» Does it:
  - Quantify the vision?
  - Define the product-market focus?
  - Give a timeline?

» Can it be shorter?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Is it narrow enough to help guide the key stakeholders and avoid distractions?

» Does it align with the company's mission and values?

Insert your evaluation here:

CAN YOU IMPROVE MICROSOFT'S VISION STATEMENT?

Insert your revised Microsoft vision statement here:

EVALUATE YOUR VISION STATEMENT

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Is it unambiguous?

» Does it describe a bright future for the company?

» Does it stretch the current organization?

» Is it vivid, powerful, valuable, attractive, and inspirational? Does it make people feel proud and excited?

» Does it distinguish the company from all others?

» Does it:
  - Quantify the vision?
  - Define the product-market focus?
  - Give a timeline?

» Can it be shorter?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Is it narrow enough to help guide the key stake-holders and avoid distractions?

» Does it align with the company's mission and values?

Insert your vision statement here:

Insert your evaluation here:

FACILITATOR'S GUIDE: FINALIZING YOUR VISION STATEMENT

Prior to crafting the final vision statement, identify the best ideas from the group. Lead the group through the consensus-building process until they agree on all sentences (number of sentences, order of sentences, content) of the final statement.

Prior to writing out the final statement, ask the attendees to ponder — and then discuss — all the ramifications of the new vision statement: What are the positive results that will ensue once the entire organization is using the vision statement to guide them in their daily activities and decisions?

As with the mission statement, the attendees should converge on a great vision statement after several iterations. If they aren't converging, you need to help them! Also, there will probably be at least one person struggling for perfection. Remind them that there will be plenty of time to examine all of the statements together, and to sleep on things, in order to help them accept the current draft and move on to the next step of the day.

CREATE YOUR FINAL VISION STATEMENT

Insert your revised vision statement here:

FACILITATOR'S GUIDE: ARTICULATING VALUES

In Step 3, you will lead the team to articulate their values/the values for the company.

» Begin the discussion by reiterating the definition of values:

Values are important and enduring beliefs or ideals shared by the members of a company about what is valuable to consider when making decisions, taking action, and interacting with other people. Values exert major influence on individual behaviors and serve as broad guidelines in all situations. Values represent the priorities in a company's culture, including how the employees make decisions and act.

» Review aloud the section "Why Identify and Establish Values" (below) — encourage everyone to talk about whether they agree with the rationale. Encourage them to share positive examples of other people in the company who exhibit positive values.

STEP 3: ARTICULATE YOUR VALUES

Values are important and enduring beliefs or ideals shared by the members of a company about what is valuable to consider when making decisions, taking action, and interacting with other people. Values exert major influence on individual behaviors and serve as broad guidelines in all situations. Values represent the priorities in a company's culture, including how the employees make decisions and act.

Unlike mission and vision statements, core values are generally more difficult to articulate. It will take significant focus, determination, and several iterations on your part before you are satisfied with the outcome. Also, unlike mission and vision statements, values are written in many different formats and sometimes take several pages to communicate.

WHY IDENTIFY AND ESTABLISH VALUES?*

Effective organizations identify and develop a clear, concise, and shared meaning of values/beliefs, priorities, and direction so that everyone understands and can contribute. Once defined, values impact every aspect of your organization. You must support and nurture this impact, or identifying values will have been a wasted exercise. People will feel fooled and misled unless they see the impact of the exercise within your organization.

If you want the values you identify to have an impact, the following must occur:

» People demonstrate and model their values in action in their personal work behaviors, decision making, contributions, and interpersonal interactions.

» Organizational values help each person establish priorities in their daily work life.

» Values guide every decision that is made once the organization has cooperatively created the values and the values statement.

» Rewards and recognition within the organization are structured to recognize those people whose work embodies the values the organization embraces.

» Organizational goals are grounded in the identified values. Adoption of the values and the behaviors that result is recognized in regular performance feedback.

» People hire and promote individuals whose outlook and actions are congruent with the values.

» Only the active participation of all members of the organization will ensure a truly organization-wide, values-based, shared culture.

Source: www.humanresources.about.com

FACILITATOR'S GUIDE: POINTS TO CONSIDER WHEN DRAFTING VALUES

» Ask the attendees to ponder the questions in the left-hand column on page 40.

» Record their responses on the flip chart.

» Then, review the considerations in the right-hand column — encourage the attendees to keep these considerations in mind as they begin working through the upcoming exercises and actually articulating their own values.

POINTS TO CONSIDER WHEN DRAFTING VALUES

Questions to Ask While Drafting

1. What values are important for our long-term success? What values will give additional guidance to those involved with the company and significantly contribute to the success of the company's mission and vision?

2. What values are important to the people in our business?

3. Which of the values above are important to develop across the entire organization?

4. While drafting our values, how can we best reflect our company's style and personality?

Questions to Ask While Evaluating Your Draft

1. Are the values clear and understandable to all stakeholders (i.e., are they easy to grasp)?

2. Are they important?

3. Are they the minimum necessary to communicate?

4. Will they offer guidance to the current organization?

5. Will people understand, appreciate, and incorporate them?

6. Do they distinguish the company from all others?

7. Are they free of jargon and written in a manner that fits the company?

8. Can they be easily memorized and repeated?

9. Are they narrow enough to help guide the key stakeholders and avoid distractions?

10. Do they align with the company's mission and vision and key people in the organization?

FACILITATOR'S GUIDE: EXAMPLES OF VALUES AND VALUE STATEMENTS

» Ask attendees to circle at least 25 of the 200 values that they think are important to the company's success, listed on .

» Read through the examples on and ask the attendees what they think about the examples.

» Are the value statements short, concise, and clear?

» Is there anything that could be done to improve these statements? If so, what?

LIST OF VALUES TO CONSIDER

Step 1: Circle the values below that you think are important to the success of your company:

Accomplishment, Achievement, Agility, Accountability, Accuracy, Adventure, All For One & One for All, Ambition, Attitude, Athletics/Sports, Authority, Beauty, Behavior (proper), Benefits to All, Calm, Challenge, Change, Charity, Civic Duty, Civic Pride, Civil Rights, Cleanliness, Orderliness, Collaboration, Collective (needs), Commitment, Common Purpose, Communication, Community, Compassion, Competence, Competition, Concern for Others, Conformity, Connection, Content Over Form, Consensus, Continuity (from past), Continuous Improvement, Cooperation, Coordination, Courage, Courtesy, Creativity, Credibility, Culture, Customer Satisfaction, Decisiveness, Dedication, Delight of Being/Joy, Democracy, Dependability, Determination, Dignity, Diplomacy (over confrontation), Discipline, Discovery, Diversity, Duty, Ease of Use, Education, Efficiency, Equality, Empathy, Empowerment (of the individual), Environment, Ethical Standards (high), Excellence, Fairness, Fact-Based Decision Making, Faith, Faithfulness, Family, Family Feeling, Flair, Flexibility, Focus, Fraternity, Freedom, Friendship, Fun, Generosity, Genius, Global View, Goodwill, Goodness, Gratitude, Growth, Hard Work, Harmony, Health and Well Being, Heroism, Honesty, Honor, Human Rights, Humbleness, Impact, Improvement, Independence, Individuality, Informality/Formality, Inner Peace, Innovation, Integrity, Intelligence, Intensity, Justice, Knowledge, Leadership, Learning, Love/Romance, Loyalty, Maximum Utilization (of time, resources), Meaning, Merit, Meritocracy, Money/Wealth, Openness, Optimism, Orderliness, Patriotism, Peace/Non-Violence, People Development, Perfection, Performance, Personal Growth, Perseverance, Persistence, Pleasure, Power, Practicality, Preservation, Privacy, Progress, Prosperity, Punctuality, Quality of Products, Quality of Service, Quality of Work, Quietude, Regularity, Reliability, Resourcefulness, Respect for Others, Responsiveness, Responsibility (taking), Results-Oriented, Rule of Law, Sacrifice, Safety, Satisfying Others, Security, Self-Management, Self-Givingness, Self-Reliance, Self-Thinking, Sense of Urgency, Seriousness, Service (to others, society), Simplicity, Sincerity, Skill, Solving Problems, Speed, Spirit in Life (using), Stability, Standardization, Status, Stewardship, Strength, Success, Systemization, Teamwork, Tenacity, Timeliness, Tolerance, Tradition, Transparency, Tranquility, Trust, Truth, Unity, Variety, Wealth, Will to Succeed, Wisdom

Note: Partially created from www.gurusoftware.com/gurunet/Business/Values.htm. For a more complete list of values to consider, see www.humanityquest.com.

EXAMPLES OF VALUE STATEMENTS

Microsoft Values

As a company, and as individuals, we value integrity, honesty, openness, personal excellence, constructive self-criticism, continual self-improvement, and mutual respect. We are committed to our customers and partners and have a passion for technology. We take on big challenges, and pride ourselves on seeing them through. We hold ourselves accountable to our customers, shareholders, partners, and employees by honoring our commitments, providing results, and striving for the highest quality.

The Warehouse New Zealand Values

The Warehouse New Zealand is a values-based business. Our key values are:

» Where People Come First
The culture of The Warehouse is unique and has been one of the key reasons behind the success of the company.

» Where Everyone Gets A Bargain
We are focused on ensuring that we provide great value products for our customers every day.

» Where The Environment Matters
The Warehouse has an extensive program of environmental and social initiatives, which we feel are improving our community and our environment. View our Triple Bottom Line Report for more information about our most recent environmental and social activities.

We aim to ensure that these values flow on to our stakeholders — our team members, customers, suppliers, shareholders, and our community.

FACILITATOR'S GUIDE: IDENTIFY YOUR VALUES

IDENTIFY IMPORTANT VALUES

» Ask attendees the questions listed on the following page.

» After asking each question, write their responses on the flip chart.

NARROW THE LIST

» Next you will work to narrow the values down to the top 20. The best way to do this is to ask
each participant to narrow their list to 10 values using the form provided.

PRIORITIZE VALUES

» Give each participant a stack of index cards.

» Ask them to write out each of the 10 values they came up with in the previous exercise (write one value per card).

» Then ask each team member to do their own ranking — to sort the cards in order, with the most important value on the top
of the deck, descending down to the least important (at the bottom of the stack). Then have each attendee tape their index
cards to the wall in a column in priority order with their top value on top and their 10th value on the bottom. Set it up so
that all of the participants' columns are next to each other.

» Compare the lowest-ranking items to see if there is consensus on them. Have a discussion around:

- Further synthesizing the values

- Keeping the top-ranked items (where there seems to be consensus)

- Eliminating the lower-ranked items (are they really important?)

- Whether the attendees can reduce the list down to 3-5 values
(if not, that's OK, but the fewer the better so they can focus on the truly important items)

- Whether the attendees are ready to do the work to communicate, live, and reinforce the values.

WHAT VALUES ARE IMPORTANT TO YOU?

Step 2: Answer the questions below using the list of values you circled in Step 1 as a guide.

What values will be necessary to help us achieve our mission and carry out our vision?	
List one or two adjectives that best describe the best people in your organization (the people you'd like to clone)?	List one or two adjectives that best describe the lower performers in your organization (the people who should not be part of the organization)? These are some antithesis values (invert them to find values):

NARROW YOUR LIST OF VALUES

Step 3: Narrow the lists developed in Step 1 and Step 2 to a maximum of 20 values and list them below:

1.	11.
2.	12.
3.	13.
4.	14.
5.	15.
6.	16.
7.	17.
8.	18.
9.	19.
10.	20.

Step 4: Take the new list and combine or eliminate values in order to reduce the list to a maximum of 10.

1.	6.
2.	7
3.	8.
4.	9.
5.	10.

Step 5: Final Reduction

1. Post each value on an index card.

2. Rank (individually) the cards by placing the most important value at the top of the deck and the least important card at the bottom of the deck. Record the list order.

3. Repeat item 2 above for each person on your team who is present today.

4. Team Discussion: Compare the lowest-ranking items to see if there is consensus on them.
   Have a discussion around:

   » Further synthesizing the values

   » Eliminating the lower-ranked items (are they really important?)

   » See if you can reduce the list down to 3-5 values (if not, that's OK,
     but the fewer the better so you can focus on the truly important items)

   » Are you ready to do the work to communicate, live, and reinforce the values?

Insert your final draft list of values here:

1. _____   6. _____

2. _____   7 _____

3. _____   8. _____

4. _____   9. _____

5. _____   10. _____

FACILITATOR'S GUIDE: MAKE YOUR VALUES RELEVANT

» Use the example to show the team how specific "words" for values can be brought to life.

» Following the examples, have the team members write out their own values and build their own sentences on flip chart paper and present them to the rest of the attendees. Try to pick the best sentences or combine sentences to fill in the form provided.

MAKE YOUR VALUES RELEVANT

Step 6: Translate the values into words and/or phrases that are meaningful to your company. Review the Zappos example below, then convert your list of values in the space provided:

From Original Value...	To Words That Fit Your Business
Quality Service	Deliver WOW Through Service
Change	Embrace and Drive Change
Fun	Create Fun and A Little Weirdness
Creativity	Be Adventurous, Creative, and Open-Minded
Self-Development	Pursue Growth and Learning
Interpersonal Relationships	Build Open and Honest Relationships with Communication
Team	Build a Positive Team and Family Spirit
Efficiency	Do More with Less
Passion	Be Passionate and Determined
Humility	Be Humble

Note: The right-hand column is Zappos' values. The left-hand column is hypothesized to show how this step works.

From Original Value...	To Words That Fit Your Business
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

FACILITATOR'S GUIDE: DRAFTING THE FINAL VALUES

» List all of the final values. Speaking aloud, ask all of the provided questions of each value.

» Ensure that there is consensus. Where there is not consensus, work through the issues until you reach consensus.

CHECK AND REVISE YOUR VALUES

Step 7: Check your values against the questions on the left and place your revisions below.

» Are they clear and understandable to all stakeholders (i.e., are they easy to grasp)?

» Are they important?

» Are they the minimum necessary to communicate?

» Will they offer guidance to the current organization?

» Will people understand, appreciate, and incorporate them?

» Do they distinguish the company from all others?

» Are they free of jargon and written in a manner that fits the company?

» Can they be easily memorized and repeated?

» Are they narrow enough to help guide the key stakeholders and avoid distractions?

» Do they align with the company's mission and values and key people in the organization?

Insert your final draft list of values here:

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7 _____

8. _____

9. _____

10. _____

FACILITATOR'S GUIDE: ADDING DETAILS AND FINALIZING THE VALUES STATEMENT

» Have attendees write in the values and what each one means to them.

» Brainstorm these aloud as well. Record them on the flip chart.

» Using the flip chart, lead the group through the process of using their final list of values to craft the sentences that will make up the values statement.

» Lead the group through the consensus-building process until they agree on all sentences (number of sentences, order of sentences, content) of the final statement.

» Prior to writing out the final statement, ask the attendees to ponder — and then discuss — all the ramifications of the new values statement: What are the positive results that will ensue once the entire organization is using the vision statement to guide them in their daily activities and decisions?

» Again, remind the attendees that there will be time to sleep on the final values statement.

ADD DETAIL

Step 8: Insert your definitions of what each of your values means to you:

Your Values (Insert your values using the Words That Fit Your Business from Step 6)	What This Means
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

CREATE YOUR FINAL VALUES STATEMENT

Insert your final values statement here:

FACILITATOR'S GUIDE: ABOUT PRIORITIES STATEMENTS

» If the team members have mentioned multiple stakeholders or have other ambiguity in their mission, values, or vision statements, they can clarify their priorities with a priorities statement.

» Consider the example on the following page. In the next step, you'll help the team determine whether they need a priorities statement.

   Note: The company may not need a priorities statement…it is only useful to eliminate ambiguity that might exist in the rest of the aspirations.

» Lead the team in a discussion of whether they need a priorities statement. Use the form below to help.

» Ask the following questions:

   - Do we mention multiple stakeholders?

   - Is there any ambiguity in any of our statements?

   - Will there be situations where a decision that is good for one stakeholder could come at the expense of another stakeholder?

» If they answer yes, it would be helpful to develop a priorities statement.

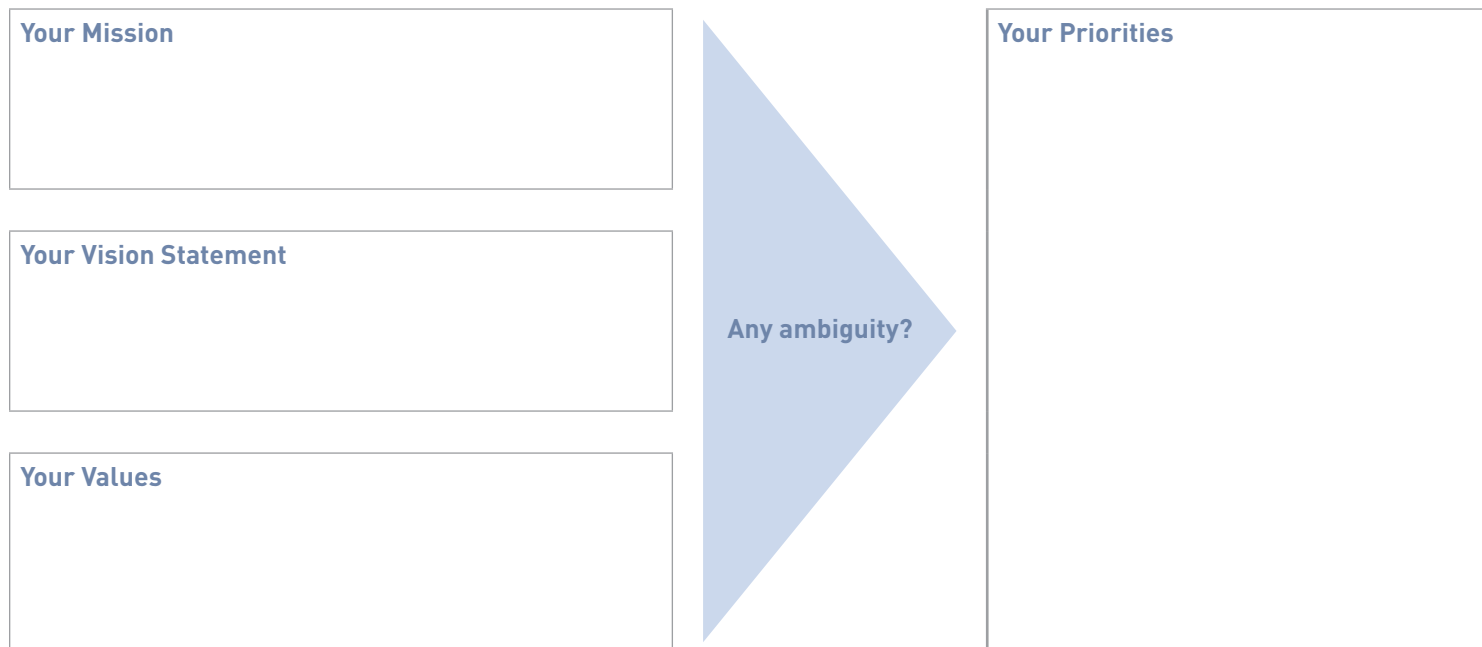## STEP 4: DEFINE YOUR PRIORITIES

If you mention multiple stakeholders or have other ambiguity in your mission, vision, and values statements, you can clarify your priorities with a priorities statement. Priorities statements are useful for helping guide decisions when the mission, vision, and values statements do not provide guidance (e.g., when a decision that would be good for one stakeholder would be at the expense of another stakeholder).

OpenView Example

OpenView mentions portfolio companies, investors, and staff in its mission statement. The OpenView priority statement clarifies its priorities:

1. Portfolio companies are our first priority

2. Firm/investors are our second priority

3. Individuals are our third priority

DO YOU NEED TO CLARIFY PRIORITIES?

Your Mission

Your Vision Statement

Your Values

Any ambiguity?

Your Priorities

openview

FACILITATOR'S GUIDE: WRITE THE PRIORITIES STATEMENT

» Using the flip chart, help the group identify all of the company's priorities.

» Get consensus on how the priorities should be ordered.

» Craft the final sentences for the priorities statement. Have a discussion about how having the priorities clarified is going to help employees and stakeholders from this point forward.

CREATE YOUR FINAL PRIORITIES STATEMENT

Insert your priorities statement here:

FACILITATOR'S GUIDE: WRAP-UP

» Wrap up the meeting by providing the final write-ups of the mission statement, vision statement, values statement, and priorities statement.

» At this point, you can get a better feel for how committed each participant is (or at least appears to be) by asking each of them to get up and present their aspirations to the rest of the team. This will help ensure that the words sound right to each participant, and it will give all of them some practice in presenting the aspirations. It also will help you determine if you should get the group to iterate on any areas that don't seem to be coming across well.

» Once you are comfortable, move forward to lead the concluding discussion.

YOUR ASPIRATIONS

Mission Statement:

Vision Statement:

Values Statement:

Priorities Statement:

FACILITATOR'S GUIDE: CONCLUDING DISCUSSION

» Agree to follow up with the team by providing written notes and final-written mission, vision, values, and priorities statements.

» Discuss the next steps that will be required of the team moving forward:

- Sleep on and revise the aspirations over the next few days

- Communicate the aspirations to the rest of the organization

- Continually test their employees' knowledge of, and adherence to, the company aspirations

- Meet on a regular basis to revisit the aspirations.

» Agree to the next meeting date to revisit the aspirations.

SOME FINAL THOUGHTS ON ASPIRATIONS

Over time you will want to test both your aspirations and the words that you use to describe your aspirations. Iterating is important, as aspirations change over time.

Separately, to become truly useful, aspirations must become part of your organization's culture. You, as leaders of the company, should communicate your aspirations regularly and act as role models by referring to the aspirations when you develop strategies, set goals, make decisions, and take action. In addition, you should point out when others' actions are in-line and out-of-line with the company's aspirations, and encourage others to do the same. Finally, periodically, you should internally assess how well people inside your organization understand the company's aspirations and how well they think the aspirations are being used to provide guidance to the organization.

WHAT REALLY MATTERS

A Guide to Defining and Realizing
Your Company's Aspirations

TABLE OF CONTENTS

WHY WE'RE HERE TODAY

Welcome! You are here today to develop your company aspirations — your mission, vision, values, and priorities. This workbook will serve as your guide.

Aspirations are a powerful source of guidance and inspiration for organizations. They help key people inside and outside an organization focus and stay aligned on the right targets, give guidance to the right path and boundaries for achieving the targets, and serve to increase an organization's velocity toward the target.

As your company grows, you need to be able to communicate who you are to new and existing employees and other stakeholders — company aspirations help you do this. Company aspirations help everyone in the company guide their activities, behaviors, and decisions. When aspirations are well expressed and baked into a company's culture, they help you to:

» Hire the people who best fit your aspirations

» Help the "right-fit" people know that you are the best company to work for

» Help the "wrong-fit" people know that your company is not the right company for them

» Inspire your staff

» Separate staff that are not aligned with your aspirations

» Give guidance for the millions of activities, behaviors, and decisions that are made in your company every week

» Allow your product market participants to understand where you are going, why you exist, and what is important to you

» Inspire your product market participants to purchase and use your products.

An aspirations-driven company gives the people, both inside and surrounding the company, extreme clarity on what to expect and what is expected, which helps you to accelerate toward your aspirations and meet your goals!

ASPIRATIONS DEFINED

What Aspirations Are

Your company's aspirations are what you aspire to be as a company. They are the longest-term and most aggressive goals for your company. Your aspirations can be organized in many different ways, but most frequently are organized as your company's mission, vision, values, and priorities.

The ultimate goal of identifying, expressing, and living your company aspirations is for everyone in and around your organization to embrace and act in a manner consistent with your aspirations, including the millions of small decisions and behaviors that take place on a weekly basis, thereby allowing you to truly reach your aspirations. Essentially, you reach your aspirations by living your aspirations.

Your aspirations goal can be broken down into mission, vision, values, and priority goals:

» **Mission Goal** – All of the people in your organization understand your organization's purpose and work toward meeting that purpose in their daily work.

» **Vision Goal** – All of the people in your organization understand what you want your company and customer set to "look like" longer term and they use this understanding to both motivate and guide their work.

» **Values Goal** – All of the people in your organization work in a manner that is consistent with your values and principles.

» **Priority Goal** – All of the people in your organization understand your priorities if there is ever any conflict between individual aspirations.

Aspirations serve as a guide for everyone inside and outside of your organization for explaining who you are, where you want to go, and how you're going to get there.

What Aspirations Are Not

Aspirations are confusing to a lot of people running emerging growth technology companies. Most of the time we find that aspirations are so confusing and appear so difficult to create that companies tend to avoid them altogether. Some companies think of aspirations as a poster to motivate employees. Other companies have senior managers who believe that aspirations are for the "troops" but not for them. These issues, and others, have led the vast majority of companies to have very poor aspirations practices and most people to have a general disregard for or disbelief in the practice. Clearly, these approaches do not meet the goals of true aspirations and the poor approaches used by other companies make it much more difficult for you to implement the practice of true aspirations.

Company aspirations are often — but should not be — confused with "product aspirations," "brand aspirations," "customer aspirations," "business unit aspirations," "functional aspirations," or any other aspirations that can be developed for a specific initiative. Company aspirations are different in that they are the umbrella over all the other aspirations. They should be aligned, but different.

WARM-UP EXERCISE

Each member of the team should answer the following questions:

Questions	Answers
Why did you join your company (the 1-3 truly important differentiators)?	
What is important to you about your company (the 1-3 truly important things that get you excited)?	
What do you do in your company?	
What is the one thing that is your unique competitive advantage in the company (the one thing that you do uniquely well)?	

STEP 1: CREATE YOUR MISSION STATEMENT

Your mission statement explains who you are and what you do. It gives everyone inside and surrounding the company clarity on what is expected and what to expect. Once it is in place, it allows everyone to help keep the company on the intended course and to make course corrections along the way.

Questions to Ask While Drafting

1. What is the purpose of the organization (why do we exist)?

2. What does the company aspire to be?

3. Who are the key stakeholders?

4. What promises are we making to the stakeholders?

5. How do we distinguish our company from our competitors?

6. What are our limits in terms of products, services, markets, and primary customers?

7. What does our company value or prioritize?

Questions to Ask While Evaluating Your Draft

1. Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

2. Does it make the right promises to the most important stakeholders?

3. Does it distinguish our company from all others?

4. Is it compelling to the key stakeholders (i.e., would you want to work for, be a customer of, or invest in this company)?

5. Does it inspire support and ongoing commitment?

6. Does it motivate those who are important to our success?

7. Can it be shorter?

8. Are the verbs proactive?

9. Is it free of jargon?

10. Can it be easily memorized and repeated?

11. Will it serve the company well over time (i.e., is it broad enough to allow us to evolve in the right direction over time)?

12. Is it narrow enough to help guide the key stakeholders and avoid distractions?

EVALUATING MISSION STATEMENTS

Savid Technologies Inc.

Our mission is simple: make technology an asset for your business not a problem. Too many times we have seen other IT consulting firms recommend solutions that are not appropriate for the specific client's business or will not take a business' operations into their planning as they routinely bring down an entire business while they perform routine maintenance on a server; that is unacceptable. We won't bring you down in the middle of the day because it is "a better time for us." We work around your business. We strive to make technology integrate seamlessly with your business so your business can grow. As your technology partner, when your business grows ours will grow with you, therefore, we will work hand in hand with you to support your growth.

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Does it make the right promises to the most important stakeholders?

» Does it distinguish the company from all others?

» Is it compelling to the key stakeholders (i.e., would you want to work for, be a customer of, or invest in this company)?

» Does it inspire support and ongoing commitment?

» Does it motivate the people who are key to the organization's success?

» Can it be shorter?

» Are the verbs proactive?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Will it serve the company well over time (i.e., is it broad enough to allow the company to evolve in the right direction over time)?

» Is it narrow enough to help guide the key stakeholders and avoid distractions?

Insert your evaluation here:

Note: You can find many more sample mission statements at www.missionstatements.com

CAN YOU IMPROVE SAVID'S MISSION STATEMENT?

Insert your revised Savid mission statement here:

Google

Google's mission is to organize the world's information and make it universally accessible and useful.

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Does it make the right promises to the most important stakeholders?

» Does it distinguish the company from all others?

» Is it compelling to the key stakeholders (i.e., would you want to work for, be a customer of, or invest in this company)?

» Does it inspire support and ongoing commitment?

» Does it motivate the people who are key to the organization's success?

» Can it be shorter?

» Are the verbs proactive?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Will it serve the company well over time (i.e., is it broad enough to allow the company to evolve in the right direction over time)?

» Is it narrow enough to help guide the key stakeholders and avoid distractions?

Insert your evaluation here:

CAN YOU IMPROVE GOOGLE'S MISSION STATEMENT?

Insert your revised Google mission statement here:

USight

Our goal is to provide the best products with the greatest service possible.

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Does it make the right promises to the most important stakeholders?

» Does it distinguish the company from all others?

» Is it compelling to the key stakeholders (i.e., would you want to work for, be a customer of, or invest in this company)?

» Does it inspire support and ongoing commitment?

» Does it motivate the people who are key to the organization's success?

» Can it be shorter?

» Are the verbs proactive?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Will it serve the company well over time (i.e., is it broad enough to allow the company to evolve in the right direction over time)?

» Is it narrow enough to help guide the key stakeholders and avoid distractions?

Insert your evaluation here:

CAN YOU IMPROVE USIGHT'S MISSION STATEMENT?

Insert your revised USight mission statement here:

EVALUATE YOUR MISSION STATEMENT

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Does it make the right promises to the most important stakeholders?

» Does it distinguish the company from all others?

» Is it compelling to the key stakeholders (i.e., would you want to work for, be a customer of, or invest in this company)?

» Does it inspire support and ongoing commitment?

» Does it motivate the people who are key to the organization's success?

» Can it be shorter?

» Are the verbs proactive?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Will it serve the company well over time (i.e., is it broad enough to allow the company to evolve in the right direction over time)?

» Is it narrow enough to help guide the key stakeholders and avoid distractions?

Insert your evaluation here:

CREATE YOUR FINAL MISSION STATEMENT

Insert your revised mission statement here:

STEP 2: DEFINE YOUR VISION

Your vision statement paints a picture of what you intend your company to look like in 1 to 5 years or perhaps longer. The vivid image serves as a target to help guide overall strategy and strategic and operating decisions, and also serves as a source of inspiration for everyone surrounding the organization. The vision statement needs to be descriptive enough about the long-term goals for the business, but should be as short and concise as possible.

Questions to Ask While Drafting

1. What does our organization want to become? (This should stretch your current capabilities but also be achievable).

2. What is our product-market focus?

3. What are our measurable long-term goals?

4. What is our differentiation? (How will we be uniquely valuable to our target customers?)

5. What is our timeline for getting where we want to be?

6. How can we create a vivid image that will focus people on the right infinite target and inspire them to move the organization in that direction?

Questions to Ask While Evaluating Your Draft

1. Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

2. Is it unambiguous?

3. Does it describe a bright future for the company?

4. Does it stretch the current organization?

5. Is it vivid, powerful, valuable, attractive, and inspirational? Does it make people feel proud and excited?

6. Does it distinguish the company from all others?

7. Does it:
   » Quantify the vision?
   » Define the product-market focus?
   » Give a timeline?

8. Can it be shorter?

9. Is it free of jargon?

10. Can it be easily memorized and repeated?

11. Is it narrow enough to help guide the key stakeholders and avoid distractions?

12. Does it align with the company's mission and values?

BRAINSTORMING EXERCISE

Brainstorm as many ways as you can to make a $10 profit by the end of the day in a new venture.
Insert your best five ways in priority order below:

My best ideas for making a $10 profit by the end of the day:

1.	
2.	
3.	
4.	
5.	

Insert your conclusion here:

EVALUATING VISION STATEMENTS

CIGNA PROPERTY & CASUALTY

To be a top-quartile specialist within five years.

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Is it unambiguous?

» Does it describe a bright future for the company?

» Does it stretch the current organization?

» Is it vivid, powerful, valuable, attractive, and inspirational? Does it make people feel proud and excited?

» Does it distinguish the company from all others?

» Does it:
- Quantify the vision?
- Define the product-market focus?
- Give a timeline?

» Can it be shorter?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Is it narrow enough to help guide the key stakeholders and avoid distractions?

» Does it align with the company's mission and values?

Insert your evaluation here:

CAN YOU IMPROVE CIGNA'S VISION STATEMENT?

Insert your revised Cigna vision statement here:

EMC

We believe that information is a business' most important asset. Ideas — and the people who come up with them — are the only real differentiator. Our promise is to help you take that differentiator as far as possible. We will deliver on this promise by helping organizations of all sizes manage more information more effectively than ever before. We will provide solutions that meet and exceed your most demanding business and IT challenges. We will bring your information to life.

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Is it unambiguous?

» Does it describe a bright future for the company?

» Does it stretch the current organization?

» Is it vivid, powerful, valuable, attractive, and inspirational? Does it make people feel proud and excited?

» Does it distinguish the company from all others?

» Does it:
  - Quantify the vision?
  - Define the product-market focus?
  - Give a timeline?

» Can it be shorter?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Is it narrow enough to help guide the key stakeholders and avoid distractions?

» Does it align with the company's mission and values?

Insert your evaluation here:

CAN YOU IMPROVE EMC'S VISION STATEMENT?

Insert your revised EMC vision statement here:

MICROSOFT

Create experiences that combine the magic of software with the power of Internet services across a world of devices.

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Is it unambiguous?

» Does it describe a bright future for the company?

» Does it stretch the current organization?

» Is it vivid, powerful, valuable, attractive, and inspirational? Does it make people feel proud and excited?

» Does it distinguish the company from all others?

» Does it:
  - Quantify the vision?
  - Define the product-market focus?
  - Give a timeline?

» Can it be shorter?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Is it narrow enough to help guide the key stakeholders and avoid distractions?

» Does it align with the company's mission and values?

Insert your evaluation here:

CAN YOU IMPROVE MICROSOFT'S VISION STATEMENT?

Insert your revised Microsoft vision statement here:

EVALUATE YOUR VISION STATEMENT

» Is it clear and understandable to all stakeholders (i.e., is it easy to grasp)?

» Is it unambiguous?

» Does it describe a bright future for the company?

» Does it stretch the current organization?

» Is it vivid, powerful, valuable, attractive, and inspirational? Does it make people feel proud and excited?

» Does it distinguish the company from all others?

» Does it:
  - Quantify the vision?
  - Define the product-market focus?
  - Give a timeline?

» Can it be shorter?

» Is it free of jargon?

» Can it be easily memorized and repeated?

» Is it narrow enough to help guide the key stake-holders and avoid distractions?

» Does it align with the company's mission and values?

Insert your vision statement here:

Insert your evaluation here:

CREATE YOUR FINAL VISION STATEMENT

Insert your revised vision statement here:

STEP 3: ARTICULATE YOUR VALUES

Values are important and enduring beliefs or ideals shared by the members of a company about what is valuable to consider when making decisions, taking action, and interacting with other people. Values exert major influence on individual behaviors and serve as broad guidelines in all situations. Values represent the priorities in a company's culture, including how the employees make decisions and act.

Unlike mission and vision statements, core values are generally more difficult to articulate. It will take significant focus, determination, and several iterations on your part before you are satisfied with the outcome. Also, unlike mission and vision statements, values are written in many different formats and sometimes take several pages to communicate.

WHY IDENTIFY AND ESTABLISH VALUES?*

Effective organizations identify and develop a clear, concise, and shared meaning of values/beliefs, priorities, and direction so that everyone understands and can contribute. Once defined, values impact every aspect of your organization. You must support and nurture this impact, or identifying values will have been a wasted exercise. People will feel fooled and misled unless they see the impact of the exercise within your organization.

If you want the values you identify to have an impact, the following must occur:

» People demonstrate and model their values in action in their personal work behaviors, decision making, contributions, and interpersonal interactions.

» Organizational values help each person establish priorities in their daily work life.

» Values guide every decision that is made once the organization has cooperatively created the values and the values statement.

» Rewards and recognition within the organization are structured to recognize those people whose work embodies the values the organization embraces.

» Organizational goals are grounded in the identified values. Adoption of the values and the behaviors that result is recognized in regular performance feedback.

» People hire and promote individuals whose outlook and actions are congruent with the values.

» Only the active participation of all members of the organization will ensure a truly organization-wide, values-based, shared culture.

*Source: www.humanresources.about.com

openview

POINTS TO CONSIDER WHEN DRAFTING VALUES

Questions to Ask While Drafting

1. What values are important for our long-term success? What values will give additional guidance to those involved with the company and significantly contribute to the success of the company's mission and vision?

2. What values are important to the people in our business?

3. Which of the values above are important to develop across the entire organization?

4. While drafting our values, how can we best reflect our company's style and personality?

Questions to Ask While Evaluating Your Draft

1. Are the values clear and understandable to all stakeholders (i.e., are they easy to grasp)?

2. Are they important?

3. Are they the minimum necessary to communicate?

4. Will they offer guidance to the current organization?

5. Will people understand, appreciate, and incorporate them?

6. Do they distinguish the company from all others?

7. Are they free of jargon and written in a manner that fits the company?

8. Can they be easily memorized and repeated?

9. Are they narrow enough to help guide the key stakeholders and avoid distractions?

10. Do they align with the company's mission and vision and key people in the organization?

LIST OF VALUES TO CONSIDER

Step 1: Circle the values below that you think are important to the success of your company:

Accomplishment, Achievement, Agility, Accountability, Accuracy, Adventure, All For One & One for All, Ambition, Attitude, Athletics/Sports, Authority, Beauty, Behavior (proper), Benefits to All, Calm, Challenge, Change, Charity, Civic Duty, Civic Pride, Civil Rights, Cleanliness, Orderliness, Collaboration, Collective (needs), Commitment, Common Purpose, Communication, Community, Compassion, Competence, Competition, Concern for Others, Conformity, Connection, Content Over Form, Consensus, Continuity (from past), Continuous Improvement, Cooperation, Coordination, Courage, Courtesy, Creativity, Credibility, Culture, Customer Satisfaction, Decisiveness, Dedication, Delight of Being/Joy, Democracy, Dependability, Determination, Dignity, Diplomacy (over confrontation), Discipline, Discovery, Diversity, Duty, Ease of Use, Education, Efficiency, Equality, Empathy, Empowerment (of the individual), Environment, Ethical Standards (high), Excellence, Fairness, Fact-Based Decision Making, Faith, Faithfulness, Family, Family Feeling, Flair, Flexibility, Focus, Fraternity, Freedom, Friendship, Fun, Generosity, Genius, Global View, Goodwill, Goodness, Gratitude, Growth, Hard Work, Harmony, Health and Well Being, Heroism, Honesty, Honor, Human Rights, Humbleness, Impact, Improvement, Independence, Individuality, Informality/Formality, Inner Peace, Innovation, Integrity, Intelligence, Intensity, Justice, Knowledge, Leadership, Learning, Love/Romance, Loyalty, Maximum Utilization (of time, resources), Meaning, Merit, Meritocracy, Money/Wealth, Openness, Optimism, Orderliness, Patriotism, Peace/Non-Violence, People Development, Perfection, Performance, Personal Growth, Perseverance, Persistence, Pleasure, Power, Practicality, Preservation, Privacy, Progress, Prosperity, Punctuality, Quality of Products, Quality of Service, Quality of Work, Quietude, Regularity, Reliability, Resourcefulness, Respect for Others, Responsiveness, Responsibility (taking), Results-Oriented, Rule of Law, Sacrifice, Safety, Satisfying Others, Security, Self-Management, Self-Givingness, Self-Reliance, Self-Thinking, Sense of Urgency, Seriousness, Service (to others, society), Simplicity, Sincerity, Skill, Solving Problems, Speed, Spirit in Life (using), Stability, Standardization, Status, Stewardship, Strength, Success, Systemization, Teamwork, Tenacity, Timeliness, Tolerance, Tradition, Transparency, Tranquility, Trust, Truth, Unity, Variety, Wealth, Will to Succeed, Wisdom

Note: Partially created from www.gurusoftware.com/gurunet/Business/Values.htm. For a more complete list of values to consider, see www.humanityquest.com.

EXAMPLES OF VALUE STATEMENTS

Microsoft Values

As a company, and as individuals, we value integrity, honesty, openness, personal excellence, constructive self-criticism, continual self-improvement, and mutual respect. We are committed to our customers and partners and have a passion for technology. We take on big challenges, and pride ourselves on seeing them through. We hold ourselves accountable to our customers, shareholders, partners, and employees by honoring our commitments, providing results, and striving for the highest quality.

The Warehouse New Zealand Values

The Warehouse New Zealand is a values-based business. Our key values are:

» Where People Come First
  The culture of The Warehouse is unique and has been one of the key reasons behind the success of the company.

» Where Everyone Gets A Bargain
  We are focused on ensuring that we provide great value products for our customers every day.

» Where The Environment Matters
  The Warehouse has an extensive program of environmental and social initiatives, which we feel are improving our community and our environment. View our Triple Bottom Line Report for more information about our most recent environmental and social activities.

We aim to ensure that these values flow on to our stakeholders — our team members, customers, suppliers, shareholders, and our community.

WHAT VALUES ARE IMPORTANT TO YOU?

Step 2: Answer the questions below using the list of values you circled in Step 1 as a guide.

What values will be necessary to help us achieve our mission and carry out our vision?	
List one or two adjectives that best describe the best people in your organization (the people you'd like to clone)?	List one or two adjectives that best describe the lower performers in your organization (the people who should not be part of the organization)? These are some antithesis values (invert them to find values):

NARROW YOUR LIST OF VALUES

Step 3: Narrow the lists developed in Step 1 and Step 2 to a maximum of 20 values and list them below:

1.	11.
2.	12.
3.	13.
4.	14.
5.	15.
6.	16.
7.	17.
8.	18.
9.	19.
10.	20.

Step 4: Take the new list and combine or eliminate values in order to reduce the list to a maximum of 10.

1.	6.
2.	7
3.	8.
4.	9.
5.	10.

Step 5: Final Reduction

1. Post each value on an index card.

2. Rank (individually) the cards by placing the most important value at the top of the deck and the least important card at the bottom of the deck. Record the list order.

3. Repeat item 2 above for each person on your team who is present today.

4. Team Discussion: Compare the lowest-ranking items to see if there is consensus on them.
   Have a discussion around:

   » Further synthesizing the values

   » Eliminating the lower-ranked items (are they really important?)

   » See if you can reduce the list down to 3-5 values (if not, that's OK,
     but the fewer the better so you can focus on the truly important items)

   » Are you ready to do the work to communicate, live, and reinforce the values?

Insert your final draft list of values here:

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7 _____

8. _____

9. _____

10. _____

»

MAKE YOUR VALUES RELEVANT

Step 6: Translate the values into words and/or phrases that are meaningful to your company. Review the Zappos example below, then convert your list of values in the space provided:

From Original Value...	To Words That Fit Your Business
Quality Service	Deliver WOW Through Service
Change	Embrace and Drive Change
Fun	Create Fun and A Little Weirdness
Creativity	Be Adventurous, Creative, and Open-Minded
Self-Development	Pursue Growth and Learning
Interpersonal Relationships	Build Open and Honest Relationships with Communication
Team	Build a Positive Team and Family Spirit
Efficiency	Do More with Less
Passion	Be Passionate and Determined
Humility	Be Humble

Note: The right-hand column is Zappos' values. The left-hand column is hypothesized to show how this step works.

From Original Value...	To Words That Fit Your Business
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

CHECK AND REVISE YOUR VALUES

Step 7: Check your values against the questions on the left and place your revisions below.

» Are they clear and understandable to all stakeholders (i.e., are they easy to grasp)?

» Are they important?

» Are they the minimum necessary to communicate?

» Will they offer guidance to the current organization?

» Will people understand, appreciate, and incorporate them?

» Do they distinguish the company from all others?

» Are they free of jargon and written in a manner that fits the company?

» Can they be easily memorized and repeated?

» Are they narrow enough to help guide the key stakeholders and avoid distractions?

» Do they align with the company's mission and values and key people in the organization?

Insert your final draft list of values here:

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7 _____

8. _____

9. _____

10. _____

»

ADD DETAIL

Step 8: Insert your definitions of what each of your values means to you:

Your Values (Insert your values using the Words That Fit Your Business from Step 6)	What This Means
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

CREATE YOUR FINAL VALUES STATEMENT

Insert your final values statement here:

STEP 4: DEFINE YOUR PRIORITIES

If you mention multiple stakeholders or have other ambiguity in your mission, vision, and values statements, you can clarify your priorities with a priorities statement. Priorities statements are useful for helping guide decisions when the mission, vision, and values statements do not provide guidance (e.g., when a decision that would be good for one stakeholder would be at the expense of another stakeholder).
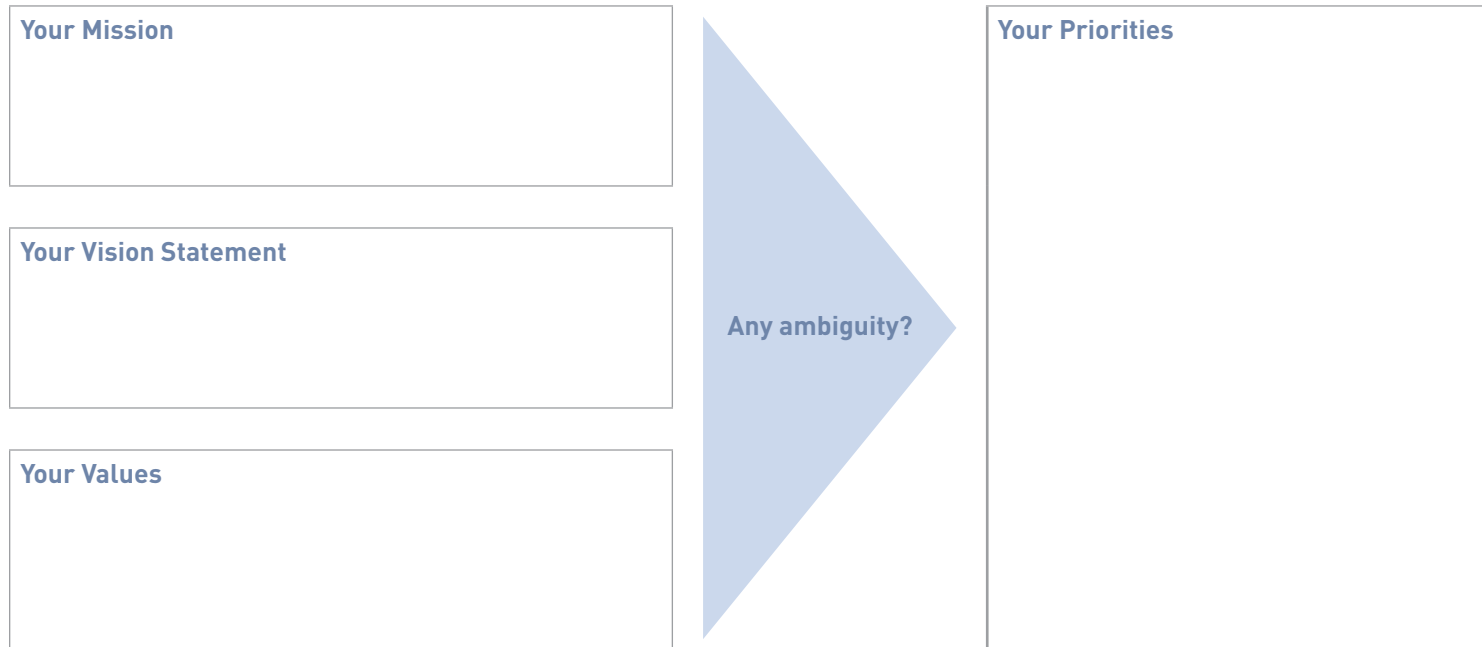
OpenView Example

OpenView mentions portfolio companies, investors, and staff in its mission statement.
The OpenView priority statement clarifies its priorities:

1. Portfolio companies are our first priority

2. Firm/investors are our second priority

3. Individuals are our third priority

DO YOU NEED TO CLARIFY PRIORITIES?

Your Mission

Your Vision Statement

Your Values

Any ambiguity?

Your Priorities

CREATE YOUR FINAL PRIORITIES STATEMENT

Insert your priorities statement here:

YOUR ASPIRATIONS

Mission Statement:

Vision Statement:

Values Statement:

Priorities Statement:

SOME FINAL THOUGHTS ON ASPIRATIONS

Over time you will want to test both your aspirations and the words that you use to describe your aspirations. Iterating is important, as aspirations change over time.

Separately, to become truly useful, aspirations must become part of your organization's culture. You, as leaders of the company, should communicate your aspirations regularly and act as role models by referring to the aspirations when you develop strategies, set goals, make decisions, and take action. In addition, you should point out when others' actions are in-line and out-of-line with the company's aspirations, and encourage others to do the same. Finally, periodically, you should internally assess how well people inside your organization understand the company's aspirations and how well they think the aspirations are being used to provide guidance to the organization.

About this eBook
This eBook was created by OpenView Labs to help companies develop their company aspirations and strategies. It includes checklists and guides for the key roles involved to help your organization get started with the aspirations process.

About OpenView Labs
OpenView Labs is the strategic and operational consulting arm of OpenView Venture Partners, a global Venture Capital fund that invests in expansion-stage technology companies.

More Information
Visit the OpenView Labs website for more ideas and inspiration for senior managers of technology companies.

To learn more about OpenView Labs or OpenView Venture Partners, contact us directly at (617) 478-7500 or info@openviewpartners.com.

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