



# Creating Core Values

## TEAM ACTIVITY GUIDE

> Your first step to inspiring and aligning your organization


# Core Values

**What are core values?** Core values define what your company stands for, what you expect from your team members, and what sets you apart from other organizations. Your values are at the heart of your organizational culture.


All business decisions, including hiring decisions, should relate directly to your core values. Core values are more than a simple list of desired traits, like “honesty” or “communication.” They are **well-defined**, **actionable**, and **unique** to your organizational culture. Core values are reflected in the small actions, habits, and choices of everyone in the organization.

## Examples of Core Values

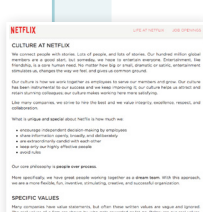
Different companies express their core values in varying ways. While these examples are from large, international companies, small businesses stand to gain even more by demonstrating their unique impact with a thoughtful list of core values.



**DR. BRONNERS**  
Dr. Bronner's' core values come in the form of **6 “Cosmic Principles”** that guide every aspect of the company—“from soapmaking to peacemaking.” Each value is centered around a different relationship, like **“Treat employees like family”** and **“Treat the earth like home”**.



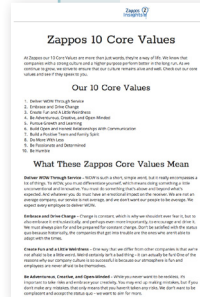
**IKEA**  
Ikea's values are presented in a **simple, straightforward list**, which includes statements like **“Leadership by Example”** and **“Constant Desire for Renewal”**.



**NETFLIX**  
Instead of a list of core values, Netflix created a **longer document** that lays out the organization's core philosophy. Under each unique trait, they outline specific values for team members to possess. For example, there is a bullet point that says **“You only say things about fellow employees that you say to their face”** under **Integrity**.



**WHOLE FOODS**  
Whole Foods' values are presented in a **customer-facing manner**, with each value linked to specific examples of how the company embodies each value. For example, their value **“We Practice Win-Win Partnerships with our Suppliers”** leads to a page with a longer description that highlights their dedication to being part of an interdependent business ecosystem.



**ZAPPOS**  
Zappos' list of **10 core values** includes short phrases like **“Deliver WOW Through Service”** and **“Create Fun and A Little Weirdness”** that are followed by a longer explanation of what each value means for their organization.

# Identifying Your Core Values

This guide will help you facilitate a group activity to identify a working set of core values. Having a clearly articulated set of company- or team-wide core values will help you make more consistent business decisions, communicate the essence of your company to customers, and recruit and retain team members.

WHAT YOU'LL NEED	
<b>MATERIALS</b> <ul style="list-style-type: none"><li>» Sticky notes</li><li>» Markers</li><li>» A big flip chart or wall for posting sticky notes</li></ul>	
<b>TIME</b> <ul style="list-style-type: none"><li>» 1 hour, plus follow-up meetings as needed</li></ul>	

## 1 Brainstorming Your Core Values

### PREP

Pass out a stack of sticky notes and a marker to each team member. Project the following questions on a screen or write them on a whiteboard where everyone can see them:

- » **What does our company truly stand for?**
- » **What are our greatest strengths?**
- » **What is unique about working here?**

### BRAINSTORM INDIVIDUALLY

Give team members 5 minutes to write as many words or phrases as they can think of to answer those questions and post them on the wall. Remote workers can write all of their answers down and have someone onsite post them for them after the 5 minutes are up.

### DIG DEEPER

If team members have trouble coming up with ideas, try asking some clarifying questions within the group, like:

- » **What values do we bring to our work when we are facing obstacles?**
- » **What values do we bring, whether or not we are rewarded for them?**
- » **What are the most important things we should expect from every team member?**

If you still need help, ask, "What do similar companies do that we would never do?" and see if thinking of opposite values helps the team to come up with new ideas.

## 2 Sorting Your Ideas

### GROUP SIMILAR WORDS

Once all team members post their sticky notes, as a group, begin to sort them into relevant themes. Do you see some of the similar words and concepts over and over again?

Group these words together on the wall. Move cards that don't seem to fit somewhere off to the side, and come back to them later in the process to see if they have a place.

### NOTICE KEY THEMES

Once you have sorted the stickies into groups, take a minute to reflect upon the themes that have emerged.

- » **What are the underlying values represented in each group?**
- » **Are some groups bigger than others?**



# Identifying Your Core Values

## 3 Refining Your Core Values

### DISCUSS TOGETHER

Take a look at the groups you have identified. Ask for a volunteer to take notes and discuss together:

- » **Which values are the most important ones we want to commit to?**
- » **Which values are essential to supporting our unique culture?**
- » **In what ways will each value help us make decisions?**
- » **Can we uphold these values all the time, regardless of the situation we are in?**

### WRAP UP

Once you have determined the essence of your core values, it's time to write them up. Close the meeting by **thanking everyone for their participation and asking for volunteers** to work with you to create a written draft of your core values.

## After the Group Activity

### WRITING UP YOUR CORE VALUES

#### Schedule a meeting with the volunteer team

to review your core values and decide how you want to present them. Feel free to discuss the examples on page 2 to help generate ideas and dive into the details. For example, if you decide on a list, how will you order the values? Are there any general terms you could tweak to more accurately reflect the vibe of your organization? Then, work with the volunteer team to write up your core values in a way that is unique to your organization.

### SHARING YOUR CORE VALUES

#### Schedule a meeting with the entire team

to share your working draft and make sure that your core values effectively capture the voice and tone of your organization. Incorporate feedback from the meeting, and continue to refine and refer to your core values going forward.

### SUSTAINING YOUR CORE VALUES

**Make sure your core values are put into action every day across your organization through the following steps:**

- 1) Clearly define, explain, and articulate your values to your team and clients.**
  - » Post your shared values somewhere everyone on your team can see — on an office wall, for example.
  - » Post your core values on your website where clients can see them as well.
- 2) Model upholding your core values every day**, and if you are a team leader, hold your team to the same standard.
- 3) Hire people who embody your values**, and make your core values a key part of all hiring and onboarding materials.
- 4) Refer to your core values consistently when making decisions and evaluating performance.** Make sure you are applying core values consistently, regardless of the situation or people involved.
- 5) Let your team know that you expect them to hold each other accountable** for upholding your shared values. For example, Netflix includes: "It's easy to write admirable values; it's harder to live them. In describing courage we say, 'You question actions inconsistent with our values.' We want everyone to help each other live the values and hold each other responsible for being role models. It is a continuous aspirational process."



# Happy Strategy's Core Values

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Happy Strategy's team used the process outlined in this guide to determine our core values. We landed on four simple ideas that are at the core of all we do:

## Creating better work cultures requires a new approach.

The future of work is uncertain, but we believe we have the power to create work cultures that can rise to the complex changes we are facing today. One thing we know: the old models simply aren't cutting it. New ways of working require adaptability and a mindset of creative problem solving that can lead to organizational breakthroughs.

## People come first.

People are the heart of every organization. In order to do their best work, people need to be supported in their growth, encouraged to bring their full selves to the task at hand, and given space for authentic expression of ideas and personal values. We strive to create environments where everyone can bring their true selves to work, because we believe inspired and engaged teams are critical to success.

## Creative problem solving belongs to everyone.

From executives to interns, all perspectives are valid — and necessary. Today's immense challenges require diversity of thought and proactive, strategic thinking. Organizations that invite all employees to be active problem-solvers and decision-makers will find that truly creative solutions can come from anywhere.

## Improvement happens through exploration, practice, and adjustment.

We work to develop a cultural mindset of continuous experimentation, practice, and adaptability to reduce the anxiety that comes with unforeseen challenges. We know that trying to address all the vast problems we're facing can feel insurmountable — and will quickly lead to burnout. So we make change approachable by using incremental improvements to lead to lasting transformations.

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 **Happy Strategy brings a human-centered approach to developing inspired, engaged teams.**

We help teams like yours put their core values into action every day. To learn more about our process or schedule a complimentary introductory conversation, email [julia@thehappystrategy.com](mailto:julia@thehappystrategy.com).

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