



Quick and Dirty Mission/Value Exercise

WHY DO THIS:

You need a way to initiate a conversation about what's important or what's changing in order to build your team or your company.

WHAT TO DO:

Here are some questions that get you started on the key elements of strategic planning. Not meant to be exhaustive, this is a good process to do alone, for one hour, or with a partner or small team. You can also use this as a “warm-up” for getting the pulse of a group before you go live with a planning process that will involve many people.

HOW:

Alone, or with appropriate team members, answer the following questions:

Part 1: Background thinking

1. What are your highest hopes for the organization?
2. What are the greatest strengths?
 - Describe a time when you produced a champion level result (this gets you to visualize what was happening and how it felt)
3. What are your greatest concerns about your future?
 - Thinks in terms of closing gaps
 - Don't get overly focused on limitations and problems – state them and move on

Part 2: Getting clear on Mission

1. What is the purpose of this organization? Why does it exist? (Mission)
2. Whom do you serve? (part of mission statement)

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3. How do you service your clients or constituents? (part of mission statement)
 - Describe how you serve your clients
4. Write a draft mission statement in 25 words or less. Make sure you have answered the 3 questions above in the statement.

(Note: this is not a marketing tagline)

Part 3: What We Value

1. Write a punch list of bulleted items, in brainstorm fashion, of what you want it to feel like – working in your organization
 - Describe the tone and feel of the business
 - See the picture
 - Do this quickly – don't over-think it
2. Work the list into a shorter, focused list
 - Be willing to give up value statements that don't hit the core of who you are
 - It's hard, but this is part of your differentiator

Next Steps:

1. Use this thinking to shape your strategic planning process – what's the mood? The key issues? Now you can plan your planning.
2. OR -- Use this output to identify targets for the upcoming year
3. Remember: Your concepts of value will also ultimately contribute to developing your image as a business.