

Defining organizational or company values



Your values are the cornerstone of your organizational culture and should reflect the commitments you make to one another and to your other key stakeholders. Values Navigator™ Cards provide a simple tool to help you guide your team through the process of defining the values that matter most to your organization and reflect how you work together when you're at your best.

Through this exercise, you'll explore:

- The values that are central to your organization's success now and in the future;
- Where your team is aligned and where team members have different points of view;
- Aligning on a set of core values and defining the behaviors that support them.

Let's get started!

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Blue Beyond's Values Navigator Cards are a comprehensive set of cards that feature 88 universal organizational values.



Initial planning & preparation

Clarify your business purpose and strategy

Before you kick off your values workshops, start by ensuring that your team understands your company's business strategy and purpose. Consult with business leaders, review relevant materials, and/or consider inviting leaders to talk with your team about the business strategy and purpose. Reinforce your team's understanding and alignment by summarizing what they heard and understood.

Organize your workshops

Plan for two separate workshops – each will be about 90 minutes. Send your team invitations to both Values Navigator workshops using the Blue Beyond Workshop Invitation Template.

If you're engaging a large group in the process of defining your organization's values, you'll want to divide your team into groups of 10 or fewer, with each group representing a diverse cross-section of employees from different parts of the business. Each group should have their own set of Values Navigator Cards.



Workshop #1

Supplies and setup

- Arrange the room so each group is seated in a “pod” at tables where they can spread out and sort their values cards.
- Gather your supplies:
 - > 1 deck of Values Navigator Cards for each table group
 - > 1 flipchart and marker for each table group
 - > 3 small post-it notes or dot stickers for each person








PRO TIP

Refer to Blue Beyond’s [Facilitator Tips & Tricks](#) for effective ways to engage your group.



Facilitator's agenda






TIME	PROCESS	SUPPLIES
10 Minutes	<p>Welcome and overview: Welcome the group and thank them for participating in this important work to align on the values that will help define your organization's culture. Walk through the objectives of the workshop:</p> <ul style="list-style-type: none">• Surface and discuss the values that each of you individually see as central to your organization's success now and in the future.• Explore areas of alignment and where you have different points of view.• Align on next steps to refine and land your organizational values. <p>Introduce the group to the Values Navigator Cards and how they'll be used.</p>	N/A
40-45 Minutes	<p>Sort the Values Navigator Cards: Provide each group with a set of values cards and ask them to do the following:</p> <p> 10 MIN: In your groups, review all the cards in the deck.</p> <p> NOTE: Based on your organization's priorities, facilitators may choose to cull the deck down to a smaller number of cards prior to the workshop. There are also blank cards that can be used to add values that are not already in the deck.</p> <p> 15-20 MIN: Sort the cards into three piles:</p> <ul style="list-style-type: none">• Yes – these values are essential to who we are and the way we work. Values in the 'Yes' group don't have to reflect the current state; they can be aspirational.• Maybe – these values could be ones on which the team doesn't agree or that they want to come back to.• No – these values don't reflect our organization's culture or ways of working. <p>As they sort the cards, ask the group to consider:</p> <ul style="list-style-type: none">• Who are we as an organization and who do we aspire to be?• How does this value contribute to our strategy and purpose?• Do I understand how this value shows up in my day-to-day role? <p> 10 MIN: Review the cards in the 'Maybe' pile. Align on your top 10 (or fewer) values and discuss why you think these values are most important.</p> <p> 5 MIN: Record your group's value choices on a flip chart.</p>	<ul style="list-style-type: none">• 1 set of Values Navigator Cards per group• 1 flipchart per group• 1 marker per group



PRO TIP

Need help narrowing it down?
Try clustering similar values together, then discussing to select the best one from each group.

continued →

TIME	PROCESS	SUPPLIES
35-50 Minutes	<p>Align on your organizational values</p> <ul style="list-style-type: none">  10 MIN: Ask each group to identify a spokesperson to share the values that their group identified as most critical to your organization’s success and why.  5 MIN: Once each group has presented, invite the group to “walk the room” and place a post-it note or dot sticker on the three values they think are most essential, recognizing that there will likely be duplicate values on several charts.  10-15 MIN: Facilitate a discussion about the patterns and the differences you observe: <ul style="list-style-type: none"> • Where do we see the most alignment? • Where are there differing perspectives? • If your organization has existing values, how do the top values the group identified align or differ?  5-10 MIN: Count the stickers and name the top 10 values that received the most votes. If there is a tie for the final spot, ask members of each group to explain why they feel the value they identified should be included.  5-10 MIN: Align as a group on the final 10. 	Post-its or dot stickers (3 per participant)
5 Minutes	<p>Thank you and next steps: Thank the group for their participation and engagement, summarize what they can expect next, and remind them about the time and date for the second workshop (see Follow-up and prep below).</p>	N/A

Follow-up and prep for workshop #2

- Send a follow-up email to the group with a list of the top 10 values they identified.
- Ask participants to review these values, rank them in 1-10 order, with #1 being most essential, and email you their rankings ahead of your second workshop.
- Compile the rankings you receive and identify the top 5 values the group has ranked the highest.



PRO TIP

If there’s a logical break in how the values are ranked, it’s ok to have just 3 or 4 final values.

Workshop #2

Supplies and setup

- Arrange the room so each group is seated in a “pod” at tables where they can work together.
- Print at least one Values in Action Worksheet for each table. Although each group will capture their final feedback on a single worksheet, it may be helpful to print enough worksheets for each person to have their own, making it easier to take notes and capture ideas.
- Gather your supplies:
 - > 1 flipchart, marker, and pen for each table group
 - > 1 pen per person
 - > 1 Values in Action Worksheet for each table or person (see note above)



Facilitator's agenda

TIME	PROCESS	SUPPLIES
15 Minutes	Welcome and overview: Thank the group for their input and for providing their rankings. Introduce the 5 (or fewer) values that received the highest rankings. Invite the group to share feedback.	N/A
20 Minutes	Define the behaviors that support each value: Assign each group (ideally, these will be different groupings than the first workshop) one of the final values the team identified. Give each group a Values in Action Worksheet and provide the following instructions: <ul style="list-style-type: none">• Use this worksheet to define this value. For example, if one of your final values is “Respect”, the team may decide that this is defined as, “Everyone at [your company] is valued and deserves the same level of respect”.• Next, identify one or two actions or behaviors that demonstrate this value in action. The Values in Action Worksheet includes examples. Encourage teams to use the prompt, “This means we...”• Record the definition and behaviors for the value you’ve been assigned on your flipchart.	<ul style="list-style-type: none">• 1 Values in Action Worksheet per participant• 1 pen per participant• 1 flipchart per group• 1 marker per group
35 Minutes	Report out and build alignment <ul style="list-style-type: none">🕒 15 MIN: Ask each group to identify a spokesperson to share the definitions and behaviors their group developed.🕒 20 MIN: Once each value has been reviewed, facilitate a discussion with the group:<ul style="list-style-type: none">• If you have more than one group that worked on the same value, align on an agreed-upon definition and behaviors.• Do these values reflect the essence of who we are as an organization when we’re at our best?• Will these values help our organization succeed now and in the future?• Is there anything that makes us, us that isn’t reflected in these values?	<ul style="list-style-type: none">• 1 flipchart• 1 marker
5 Minutes	Thank you and next steps: Thank the group for their participation and engagement, summarize the output of the two workshops, and let them know what they can expect next.	N/A

Follow up

Once you've done any final fine-tuning, it's time to introduce your values to the broader organization.

- Actively promote core values and keep them top of mind.
- Embed values throughout your business processes, practices, and tools.
- Ensure leaders, managers, and employees model and encourage values-driven behaviors.

You'll find additional tips to support you on your values journey in our [Core Values Assessment](#).

Blue Beyond is available for enhanced consultation and support, including:

- Working with you to embed your values into your broader organizational culture.
- Helping you translate the outputs of your team's work into your purpose, vision, and strategy.
- Providing compelling visual design to translate your values into images that tell the story of how your values show up in your organization.
- Building an employee value proposition that exemplifies who you are and who you aspire to be when you're at your best.



valuesnavigator™

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Blue Beyond is a management consulting firm that specializes in the people side of business – culture, talent, organizational effectiveness, change management, communications, and diversity, equity, and inclusion. We serve clients throughout North America and globally, including Fortune 500 companies, non-profits, universities, and small- and mid-sized firms. Founded in 2006, Blue Beyond is headquartered in the San Francisco Bay Area with additional team members across the U.S.

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