



Schoolhouse Consulting
& Training

What's Your Mission? Strategy Tools for Your Small Business

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- ◆ Independent consultant & trainer (retired) – Schoolhouse Consulting & Training
- ◆ Formerly a project manager, practice manager, consultant, PMO manager
- ◆ SCORE Mentor and Trainer!





Learning Objectives

- ◆ Understand the power of a great mission statement and clear values & vision statements and how to use them
- ◆ Explore ways to identify your mission, values and vision
- ◆ Learn how to use your mission, values and vision statements to market your business and drive decisions.

What Drives You to Run Your Business?

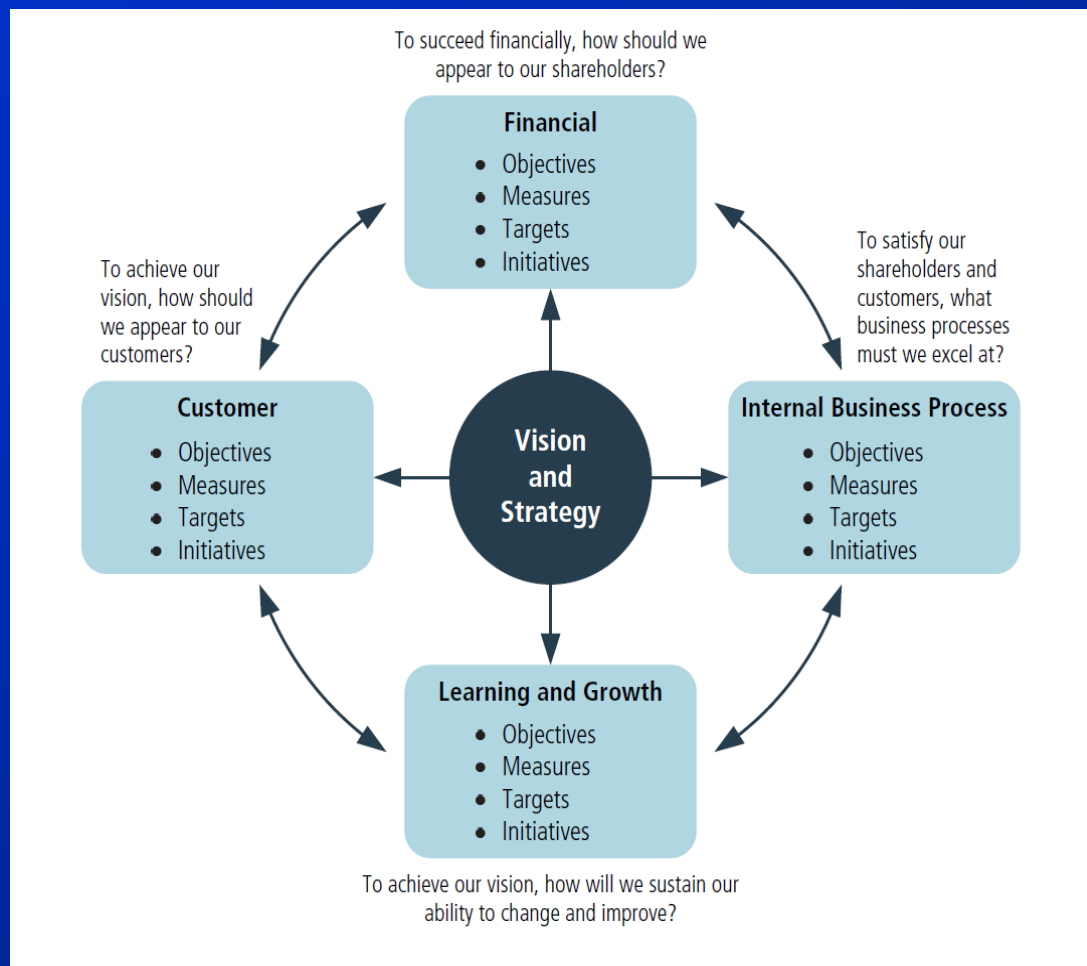
Take a moment to describe what urges you to own your business

- Beyond the need to make money, why this way?
- What will success look like?
- What will it *feel* like?

Write it down.



How Do You Measure Success?



Adapted from *The Balanced Scorecard*
Kaplan, Robert S.
and David P. Norton,
1996

Norton & Kaplan's Balanced Scorecard
Looks at different dimensions of success

Balanced Scorecard Perspective



Adapted from *The Strategy-Focused Organization* Kaplan, Robert S. and David P. Norton, 2001

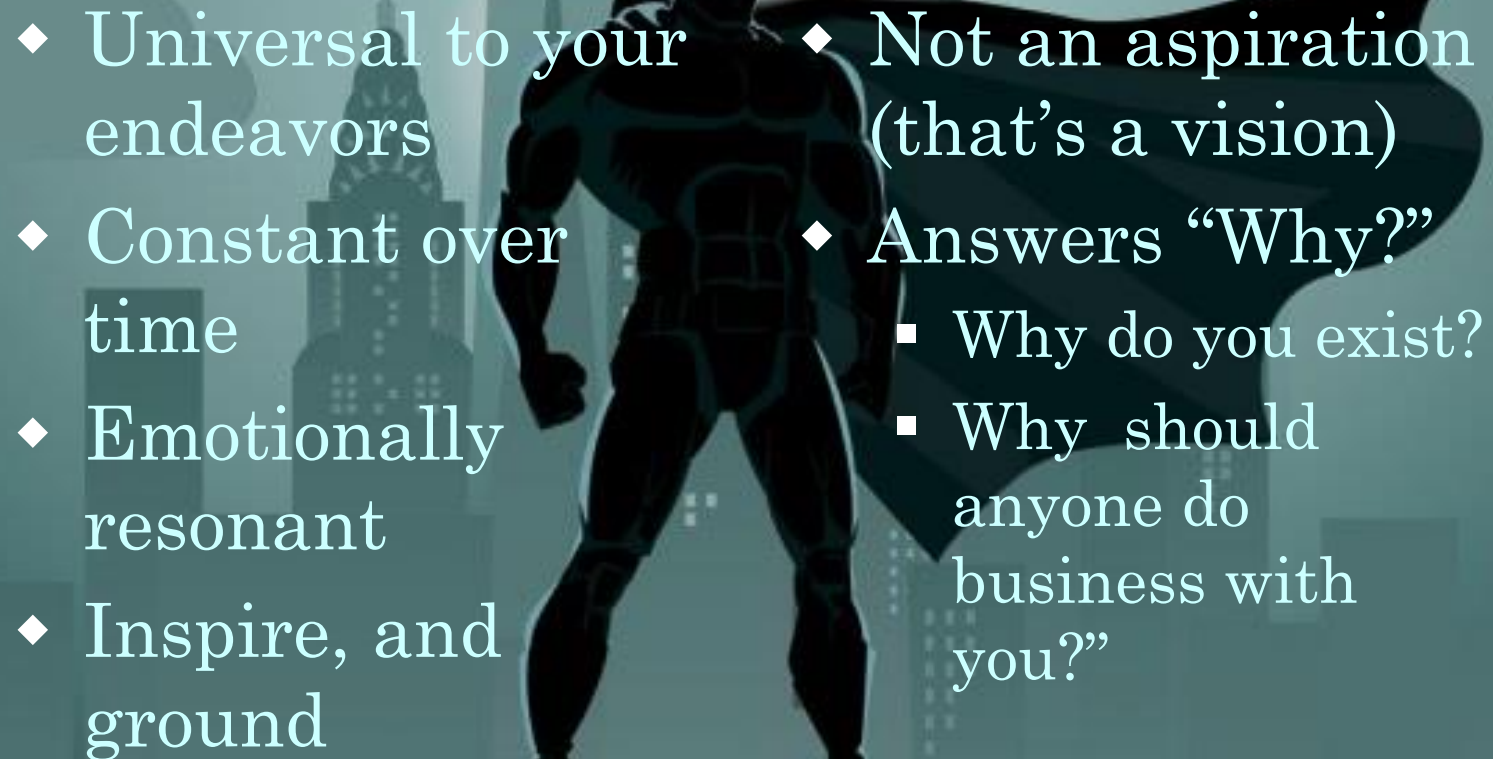


Mission Statement

- ◆ Your business's reason for existing.
- ◆ Should align with your personal mission, or purpose.
- ◆ What do you want your clients and employees to know matters to this company?



Mission Statements

- 
- A silhouette of a superhero, possibly Superman, stands on a dark globe. He is wearing a suit with a cape and a chest emblem. The background features a stylized city skyline with various skyscrapers under a teal sky with soft clouds. The overall color palette is monochromatic, using shades of teal and black.
- ◆ Universal to your endeavors
 - ◆ Constant over time
 - ◆ Emotionally resonant
 - ◆ Inspire, and ground
 - ◆ Not an aspiration (that's a vision)
 - ◆ Answers “Why?”
 - Why do you exist?
 - Why should anyone do business with you?”



Virgin Airlines

To embrace the human spirit and let it fly.





Tesla

To accelerate the world's transition to sustainable energy.



Starbucks



To inspire and
nurture the
human
spirit—one
person, one
cup, and one
neighborhood
at a time.





Disney

Creating
happiness
through magical
experiences.





Ford

To make our cars better, our employees happier and our planet a better place to be.

Ford



Zappos

To provide the best customer service possible. Deliver WOW through service.

Zappos 
.com 
POWERED *by* SERVICE™

Harley Davidson

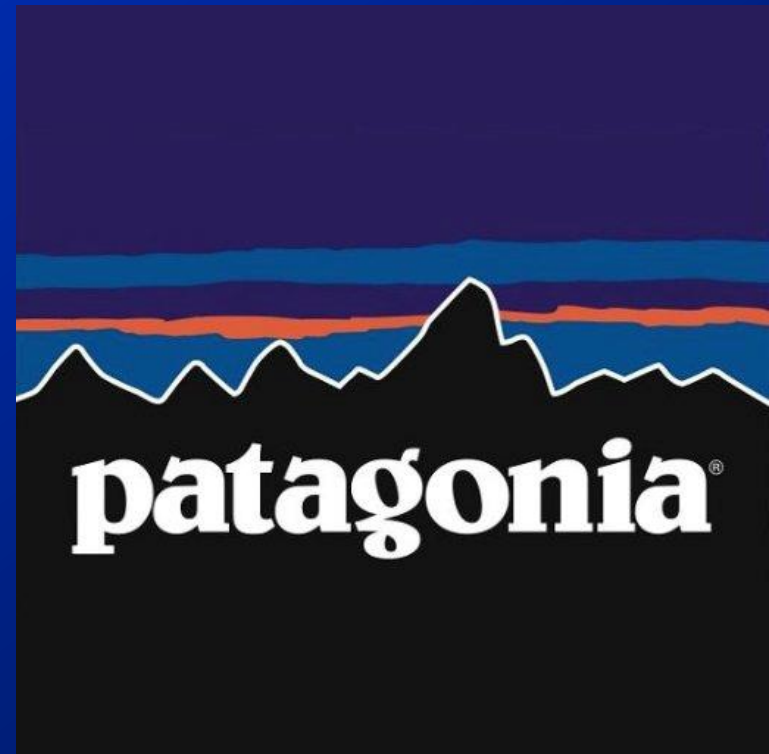


We fulfill dreams of personal freedom

Patagonia

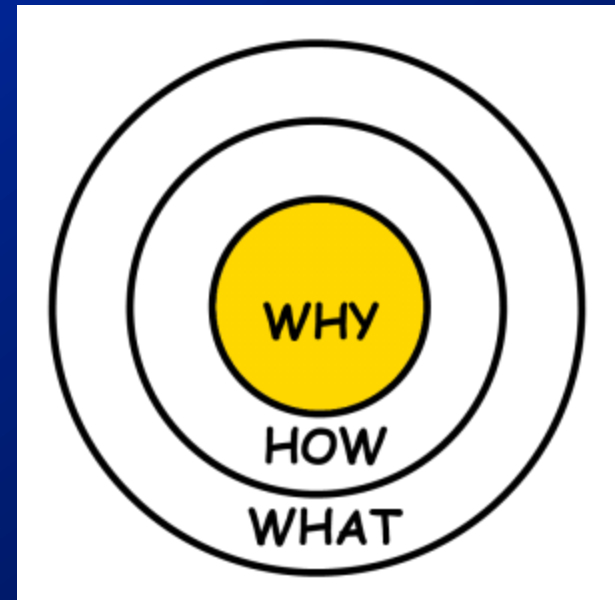


We're in business to
save our home
planet.



Creating a Mission Statement

- ◆ Why – your purpose
- ◆ What – your offering
- ◆ How – your values





My Mission

The SCT mission is to foster wisdom that helps organizations solve problems, deliver value-added results and focus on what matters by connecting people, purpose and ideas.



Values

Quick...

What are Superman's values?

- Truth
- Justice
- The American Way



What Do Values Do For Your Business?



- ◆ The “scale” on which you make your decisions
- ◆ Reflect what is most important to you
- ◆ Create your culture

opinion w
value /'væ
desirable:
worth of



Identify Your Values

https://motivationalinterviewing.org/sites/default/files/valuescardsort_0.pdf

- ◆ Acceptance
- ◆ Accuracy
- ◆ Achievement
- ◆ Adventure
- ◆ Attractiveness
- ◆ Authority
- ◆ Beauty
- ◆ Caring
- ◆ Challenge
- ◆ Change
- ◆ Comfort
- ◆ Commitment
- ◆ Compassion
- ◆ Contribution
- ◆ Cooperation
- ◆ Courtesy
- ◆ Creativity
- ◆ Dependability
- ◆ Duty
- ◆ Ecology
- ◆ Excitement
- ◆ Faithfulness
- ◆ Fame
- ◆ Family
- ◆ Fitness
- ◆ Flexibility
- ◆ Forgiveness
- ◆ Friendship
- ◆ Fun
- ◆ Generosity
- ◆ Genuineness
- ◆ God's Will
- ◆ Growth
- ◆ Health
- ◆ Helpfulness
- ◆ Honesty
- ◆ Hope
- ◆ Humility
- ◆ Humor
- ◆ Independence
- ◆ Industry
- ◆ Inner Peace
- ◆ Intimacy
- ◆ Justice
- ◆ Knowledge
- ◆ Leisure
- ◆ Loved
- ◆ Loving
- ◆ Mastery
- ◆ Mindfulness
- ◆ Moderation
- ◆ Monogamy
- ◆ Non-conformity
- ◆ Nurturance
- ◆ Openness
- ◆ Order
- ◆ Passion
- ◆ Purpose
- ◆ Pleasure
- ◆ Popularity
- ◆ Power
- ◆ Rationality
- ◆ Realism
- ◆ Responsibility
- ◆ Risk
- ◆ Romance
- ◆ Safety
- ◆ Self-acceptance
- ◆ Self-control
- ◆ Self-esteem
- ◆ Self-knowledge
- ◆ Service
- ◆ Sexuality
- ◆ Simplicity
- ◆ Solitude
- ◆ Spirituality
- ◆ Tolerance
- ◆ Tradition
- ◆ Virtue Wealth
- ◆ World Peace

Most Common Values

- ◆ **Integrity** (Ethics, Honesty)
- ◆ **Respect** (Trust, Dignity)
- ◆ **Excellence** (Quality, Performance)
- ◆ **Responsibility** (Accountability, Commitment)
- ◆ **Teamwork** (Collaboration, Cooperation)
- ◆ **Innovation** (Creativity, Ingenuity)
- ◆ **Achievement** (Results, Success)
- ◆ **Fairness** (Diversity, Inclusive)
- ◆ **Care** (Service, Compassion)
- ◆ **Passion** (Enthusiasm, Fun)
- ◆ **Leadership** (Influence, Competitive Advantage)
- ◆ **Learning** (Continuous Improvement, Knowledge)
- ◆ **Customers** (Customer Satisfaction)
- ◆ **People** (Employee Engagement)
- ◆ **Safety** (Health)
- ◆ **Community** (Corporate Citizenship)
- ◆ **Environment** (Sustainability)

<https://www.fergusonvalues.com/17-common-values/>

Vision

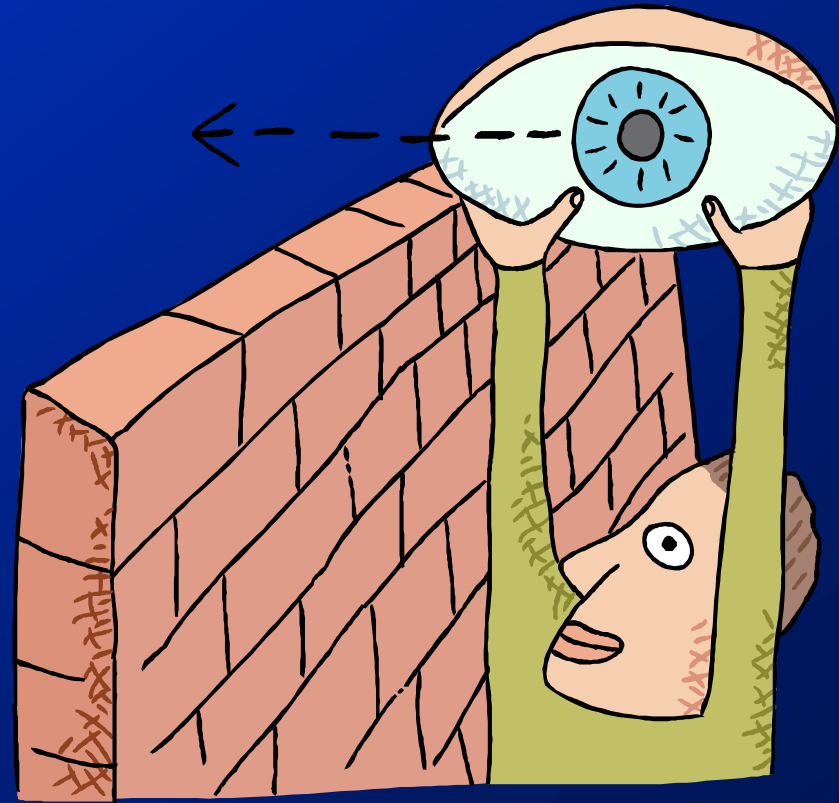


noun

1. the act or power of sensing with the eyes; sight.
2. the act or power of anticipating that which will or may come to be: prophetic vision; the vision of an entrepreneur.
3. an experience in which a personage, thing, or event appears vividly or credibly to the mind, although not actually present, often under the influence of a divine or other agency: a heavenly messenger appearing in a vision. (Compare to hallucination)
4. something seen or otherwise perceived during such an experience: The vision revealed its message.
5. a vivid, imaginative conception or anticipation: visions of wealth and glory.

Business Application of Vision

- ◆ A statement of what we want to be
- ◆ Derived from the organization's mission and core values
- ◆ Drives the organization's strategy, goals, objectives and initiatives (projects)



Purpose of the Vision Statement

- ◆ Clarify the end state
 - Context for the benefits
 - Provide direction
 - Enable focus
- ◆ Generate excitement
 - Identify value-added result
 - Identify opportunity for inclusion

Uses of the Vision

A vintage brass telescope is mounted on a wooden stand. The telescope is the central focus, with its lens and various adjustment knobs visible. The background is a clear blue sky with some light clouds. The overall tone is professional and focused.

- ◆ Identify a clear and complete set of benefits
 - Establish meaningful metrics
 - Establish criteria for evaluation
- ◆ Provide focus
 - Eliminate confusion and distractions
 - Create a common interest for the team



A Common Goal

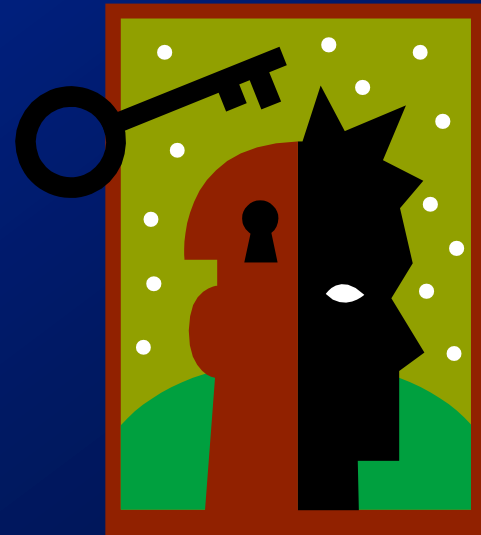
Enables us to form a community

- Identifies need and desire for interdependence
- Identifies opportunity to get our common needs met
- Creates an environment for our social need to belong

Motivation

A great vision statement is the key to motivating the team

- Identifies the importance of the work
- Enables stakeholders picture themselves as part of this endeavor





My Vision

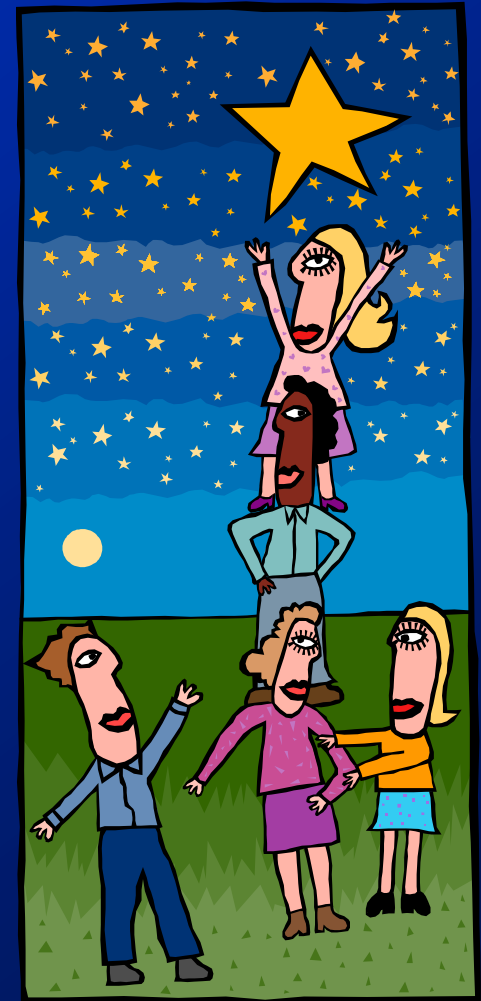
Be an authentic and valued guide to my clients in their quest to deliver solutions and reach their full potential.

I value the unique abilities and gifts of each person I work with and strive to help them progress on their path of growth and experience and fully manifest their contributions to the world.



Identifying the Vision

- ◆ Start with what you value
- ◆ Identify verbal and visual metaphors
- ◆ Focus on the emotion the idea creates
- ◆ Enroll others to get ideas, buy-in and enthusiasm

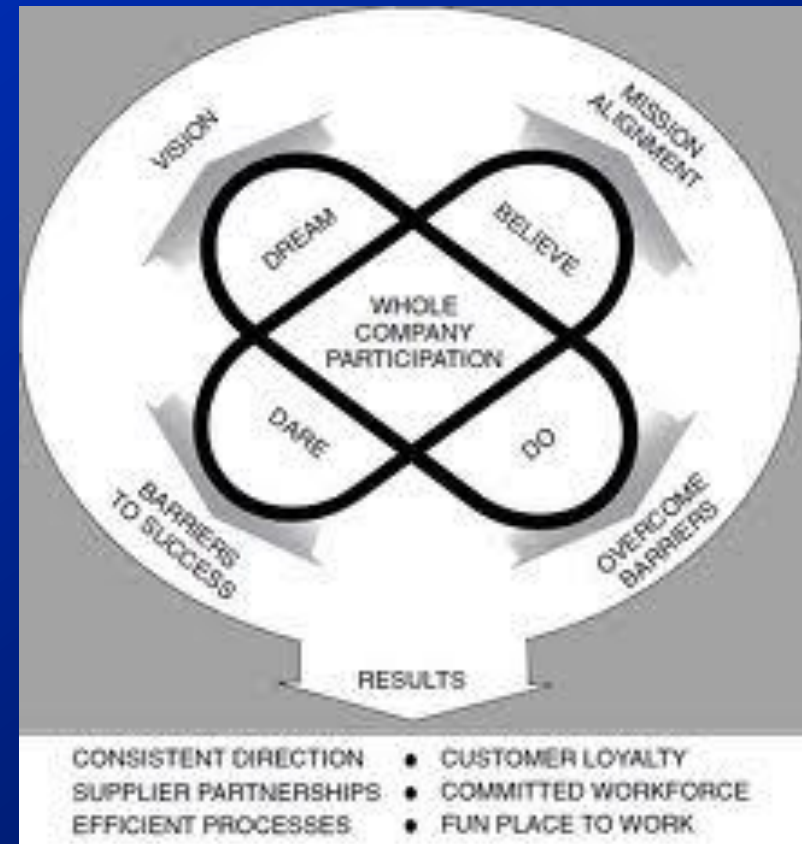




The Disney Method

Start with “Dream”

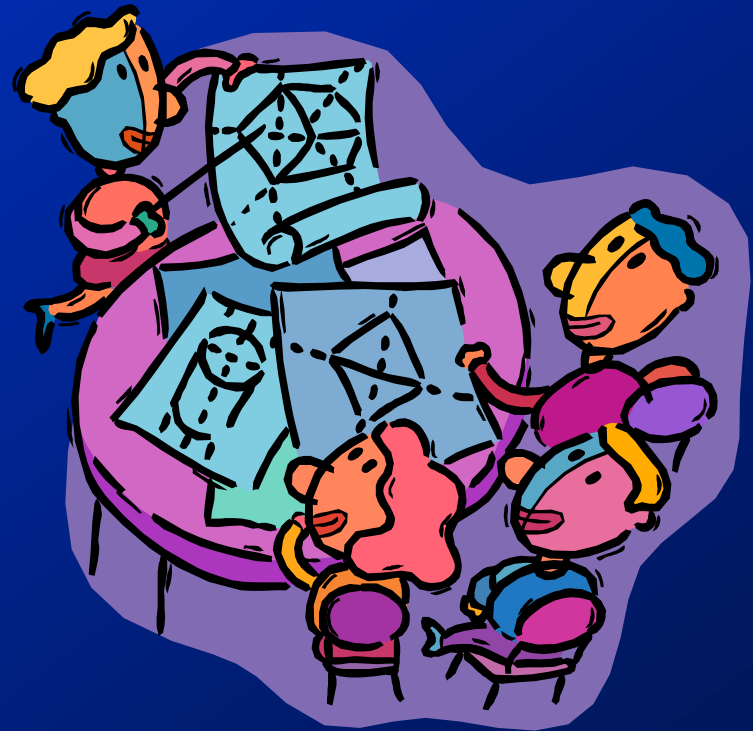
- Needs a safe environment
- Needs a positive frame of mind
- Reflective, imaginative thinking
- Be playful





Use Visual Methods

- ◆ Draw the vision
- ◆ Use mind maps
- ◆ Use Post-It™ notes
- ◆ Use color!
- ◆ Picture success

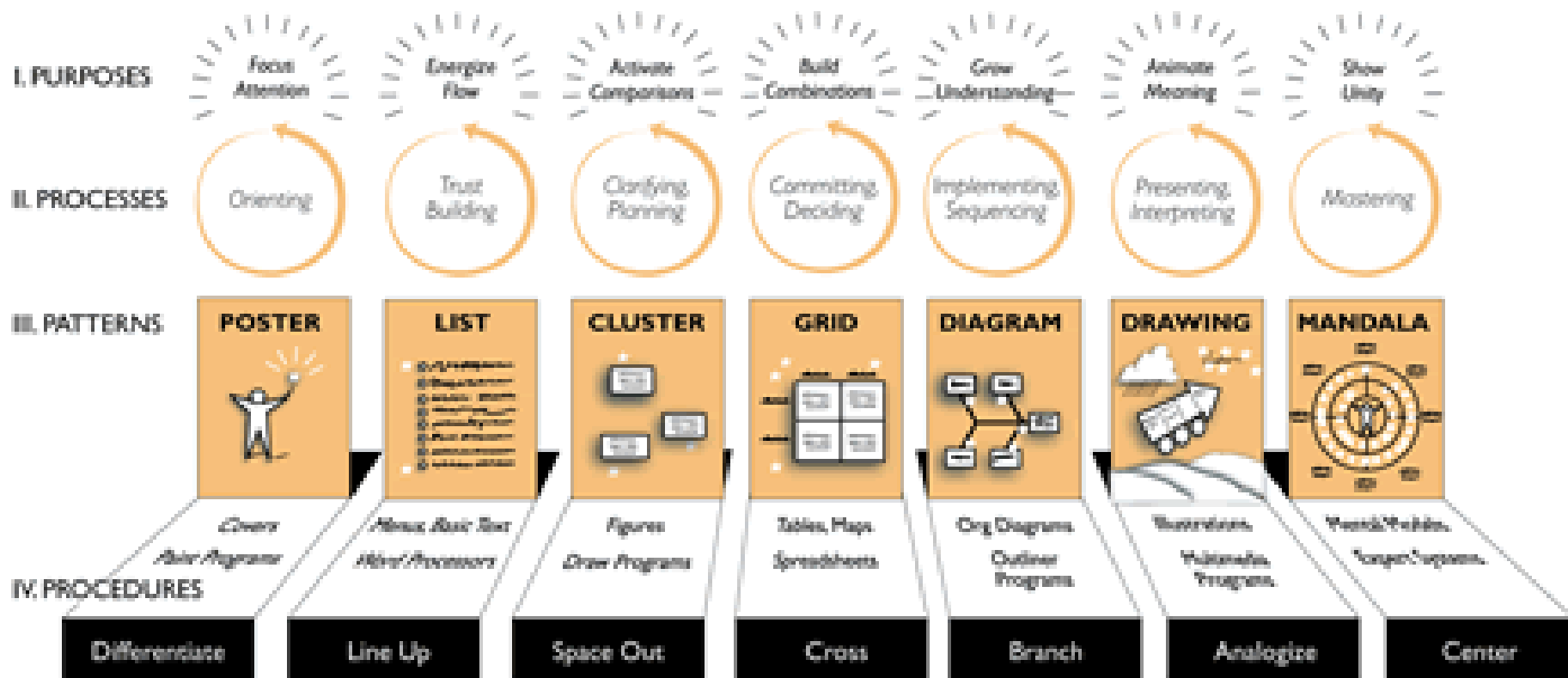




Group Visual Techniques

Group Graphics® Keyboard

A Process-Oriented Grammar for Visual Language



SIMPLE ← ————— V. 11.0 © 2005 The Grove Consultants International ————— → COMPLEX



Wordsmith Carefully

- ◆ Simple
- ◆ Clear
- ◆ Vivid





Vet the Idea

- ◆ Test it with others
 - Is the message getting across?
 - Are they excited?
 - Does it make them come up with contributions?
- ◆ Revisit and refine





Using the Vision

- ◆ Make it the Rosetta Stone
 - When making a choice, ask “which choice gets us closer to our vision and objectives?”
- ◆ Refer to it when making decisions
- ◆ Keep it visible





Extract the Benefits

The benefits are what we get when the vision is realized

- Customers
- Team
- Organization
- Community
- World

