

## STEPS:

1. Review the previous examples to help guide thinking.
  - Recall the definition: A set of principles and shared views that you expect everyone in the company to abide by. These should be unique to your culture and meaningful to your employees.
  - Core values are a set of unique identifying behavioral characteristics that define how your people behave and what you will not tolerate.
2. Discuss the identifying behavioral characteristics that make your company unique. How are you different from other companies in your space?
3. Discuss the unique identifying behavioral characteristics that you/your team will not tolerate.
4. Get the leadership team to start making suggestions of core values on Post-it Notes. Put the notes up on the whiteboard.
5. Once all the suggestions are exhausted, get the team to step back and look for common themes.
6. Arrange the Post-it Notes into buckets by theme.
7. Summarize the common themes into overarching core values.
8. Have the team vote on the top values—your goal is to end up with three to seven core values.
9. Designate a scribe to summarize the results of the vote. Be sure to keep a record of all suggestions, even those that were not part of the eventual selections.
10. Select a member of the leadership team to own the FOLLOW-UP STEPS.

## FOLLOW-UP STEPS.

To be completed after the off-site meeting:

1. Rewrite the values in a unique way to make them meaningful to your company. If you struggle with this step, it may be helpful to hire a professional copywriter.
2. Once rewritten, send the core values document to the leadership team for review and reflection.
3. Instruct the leadership team to observe each other and their reports over the next thirty days as part of the review process, and to be prepared to share stories of each value in action at the next meeting.

## THE FINALIZATION MEETING.

Book a second off-site meeting thirty days after the original meeting to share stories and evaluate the company on each of the values

1. Have the team share their stories of each core value in action. Look for the behaviors and actions that define the core value.
2. Note which values have the best stories and which have few or no stories. If a value has few stories or no stories at all, you must determine if it is actually a core value.
3. List the definition of each core value in bullet-point form. Be specific with the types of behaviors and actions that you expect to demonstrate each value. These examples will also serve as a tool for evaluating talent on an ongoing basis after the hiring.
4. Next, you must evaluate your leadership team. This step requires trust and honesty. If the leadership team does not embody the values, this process will seem hypocritical to employees and lose its effectiveness.
5. Once you have vetted the core values, create a values document, and arrange a company-wide meeting, or call to share it with employees.
6. Include the values documents in your interview process.
7. Create interview questions for each of the values.
8. Use the core values as your guide to praise employees in public when they live the core value.
9. Provide constructive feedback to employees when the core values are not being met.
10. Create a scoring system to grade your team on the core values.
11. Meet quarterly with your reports to provide feedback on those of your people living the core values. Gather stories of the core values in action and share these with the company.