



Core Values Workbook: Part 1

Core Values should have 3 parts developed by organizational leadership

- The Header (memorable, timeless, uses the language of your organization)
- The Description (timeless, descriptive of the core values)
- Protocols (evolves in time/experience, incorporates how this applies)

Creating the Headers:

1. If your company was a living, breathing organism with its own personality what would it act like? Take the online quiz at <https://brandpersonalityquiz.com/>



The Innocent: Optimistic, trustworthy, and seeking happiness.

The Everyman: Down-to-earth, relatable, and focused on practicality.

The Hero: Courageous, confident, and seeking to overcome challenges.

The Outlaw: Rebellious, independent, and challenging the status quo.

The Explorer: Adventurous, seeking discovery, and embracing new experiences.

The Creator: Innovative, imaginative, and seeking to express their creativity.

The Ruler: Powerful, authoritative, and seeking to control and lead.

The Magician: Transformative, inspiring, and seeking to make dreams come true.

The Lover: Passionate, romantic, and seeking connection and intimacy.

The Caregiver: Compassionate, nurturing, and seeking to help others.

The Jester: Fun-loving, playful, and seeking to entertain and bring joy.

The Sage: Wise, knowledgeable, and seeking to share insights and wisdom.

2. List the 2-3 traits of your superstar employees:

3. List words that describe a negative situation you have experienced that you NEVER want to see in your organization (or see it again!):

4. Now find words/phrases/ideas that are the opposite to the answer in #3:

5. Review List of Core Value Themes. List 4-6 themes based on your answers above.

1. _____	2. _____
3. _____	4. _____
5. _____	6. _____

6. Scenario Testing: Think back to any recent conflict or difficult decision, would the themes above have applied to your resolution or decision? Will this core value apply to your organization 10, 20, 50, 100 years from now? Think of different scenarios and make sure you are not missing a core value. Add an additional theme or strike out one if it won't apply in real life or be lasting.
7. Take those core values and create words, phrases or even pictograms based on the shared language and culture of your organization. (combine similar themes as desired)
E.g. Productivity = Do Work!; Integrity = Live Zen; Innovation = Break the box; Excellence = Wow Everyone
8. List your Core Value Headers (timeless, memorable, unique to your language)
Reminder: keep to a total of 5-9 keywords not including articles and prepositions

The Description (timeless, descriptive, clear and concise)

Take each of your core values headers and write down EVERYTHING that statement means to you and your organization. Re-Write it into 4-8 clear sentences capturing these intentions (or better yet use ChatGPT/AI to help you)

Core Value Protocols:

- Take any existing policy, protocol and wrap it with your new core values
- If not doing so already add a section to your policy/protocols/SOPs and tie them back to your mission and/or core values.
- Start every conversation (particularly around key decisions or changes) as they relate to your core values
- See Part 3 ideas for new protocols/processes based on how you choose to implement your core values