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CREATE A THRIVING CULTURE

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A Step-By-Step Guide for Executive Leaders



Few concepts are as important to a business' or nonprofit's success as organizational culture.

Yet, how do you create a healthy organizational culture?

The good news is that while it takes hard work, the path forward is clear.

In this guide, we'll walk you step-by-step through the process of leading your organization into a healthy culture that people want to work for and helps turn your organization into an even more effective organization.

"Culture eats strategy for breakfast."

- Peter Drucker

Start with Core Values

Core Values are the foundation for a great culture, so you need to start here. Your Core Values will function as the definition of "thriving culture."

Crafting your list of Core Values needs to be done intentionally and include more than a generic listing of values.

Below you'll find a Core Value Guide that will walk you through the process of crafting a robust list of Core Values that will be the foundation of your thriving culture and **how to install them into your culture.**



How to Craft a Core Value List That Creates a Thriving Culture:

Every organization needs a list of Core Values that goes beyond an arbitrary list of generic values.

In this guide, we'll walk you through step-by-step how to craft a list of Core Values that will help shape your culture for years to come.



Step 1: Gather Your Team

Core Values work best when they are collaboratively chosen rather than dictated from the top.

Step 2: Collaboratively Create a Long List of Potential Core Values

You can also review your current Core Values at this step if you have a list you are refreshing or replacing.

Process: Spend 30-40 minutes brainstorming with your team on potential values that matter to your team and organization.

During this exercise, do not filter out any suggestions. There will be a time for that in a later step. At this point, we want to gather a robust long list of potential values. Often an initial value that might not make the final list will inspire another value suggestion that may. You should have 20-30+ value terms by the end of this process.

Similarly, do not worry about synonyms or "sub-values" during this process. If someone says it, include it on the list.

Tip From a Facilitator: I recently completed this exercise with a client where "Integrity," "Honesty," and "Telling the truth" all made the Core Values Long List. The different options provided an opportunity for a conversation on which term best incapsulated what we meant by the three options, which created greater clarity and eventual buy-in on the final value list.

Step 3 : Select One Value and Add to Core Values List

For most organizations, their final 7-8 values are somewhere on this long list. We want to start narrowing down our list to the top 7-8.

To do this, it is helpful to start by looking for a "no-brainer" Core Value from your long list--i.e. a Core Value that everyone agrees should "obviously" go on the Core Values.

Add that value to the Core Value List and follow the process to define that Core Value.

#	Value	Specifics
	Integrity	

Step 4: Clarify the Specifics

If we do not have a shared definition of our Core Values, it is nearly impossible to lead into them and build a thriving culture.

In this step, your team will flush out what is meant by the word or phrase you chose for your Core Value.

Process: Ask your team, "How would we define this value to someone who doesn't know what it means?" or "What does this Core Value look like when it is lived out?"

Tip From a Facilitator: In working with clients, I have found a helpful question to clarify the specifics of each Core Value is to ask, **"If you had to coach an employee into living out this valued, how would you describe it?"** This also provides some fertilizer for future conversations.

Spend some time clarifying the specifics of each value until you have a clear and practical description for the value. Write this under the specifics column for the Core Value.

Remember, the goal here is to clarify what is meant by each value that can be summarized in a phrase, sentence, or a few bullet points at most.

Specifics can be as simple as...

- a quick phrase Integrity: We Do What We Say
- a full sentence Simple Solutions: We seek out easy and straightforward solutions for our clients and vendors.
- or a few bullet points Humility: We ask good questions before giving good answers. We celebrate other's accomplishments. We confidently offer help to those in need.

#	Value	Specifics
	Integrity	We do what we say even when no one is looking.

Repeat Steps 3 & 4 Until You Have a List of 7-8 Core Values That Define Your Thriving Culture

Guide your team through the process of selecting each subsequent Core Value and completing the Specifics column for each.

During this time, you can add new candidates to your long list, wordsmith terms into phrases, or start bucketing similar Core Values from your Long List to land on a single word or phrase for each Core Value.

Do not go above ~7-10 values, ideally ~7-8.

If you go over 7-10 values, you are no longer looking at Core Values but simply values. **Stay narrow to remain powerful.**

You may find it is helpful to look for themes throughout multiple values on the Long List and begin to bucketing them together. You'll often find that a series of values on your Long List can be bucketed into a single phrase for your Core Value list. These are often some of the more powerful Core Values within an organization.

While doing the specifics, it can often be helpful to write out the suggestions on a whiteboard to capture the inputs, and then edit them before adding them to your sheet.

Tip from a Facilitator: When working on the specifics for a Core Value, you may find that a phrase or sentence within the description is a powerful replacement for the original word you used for your Core Value.

For example, you may start with "Integrity" and during the specifics conversation someone suggests "Acting with Courageous Integrity." The group may then decide to change the original Core Value to "Courageous Integrity." This can be a helpful way to arrive at a more word smithed rendition of your value.

Tip From a Facilitator: In working with clients, I commonly get asked "Can we go above 7-8?" I'll explain that while nearly everything on our long list is something that we value, our goal is to get to our CORE Values.

I'll often illustrate this by giving the example of a value that most organizations will care about, but won't make the Core Value list to illustrate. For example, most organizations care that emails are responded to within ~24hrs or that voice mails are returned, but I've never seen "Returning emails within 24hrs" make a Core Values list. By not adding something to our Core Value list, we're not saying we don't value it. We're only saying that it is not a Core Value. Our goal is CORE Values.

You will know you're done when you have a list of 7-8 Core Values that everyone agrees on and description for each Core Value specific and practical enough that you can coach an employee.

You now have a robust list of 7-8 Core Values that will help create a thriving culture for years to come.

Step 5: Add Core Values to Your Dashboard

Most organizations have a dashboard or metrics to measure success. To effectively begin shaping your culture to match your Core Values, you will add your Core Values to your success metrics dashboard.

The first time you add your Core Values to your dashboard, do an honest evaluation of where you stand as an organization for each value using the specifics of each Core Value. Assign a Red, Yellow, or Green status to each.

Don't have a Dashboard? Request our consultation to develop one to more easily guide your organization towards your strategic goals.

At least quarterly, review you Core Values with a R/Y/G evaluation at the organizational level and more frequently for each department.

Organizations that don't monitor and *measure* their Core Values will struggle to *implement* their Core Values.

What is Red, Yellow, Green

For those who may be new to the Red, Yellow, Green system:

Red: Serious problem, needs to be fixed.

Yellow: Some risk, needs work but no crisis.

Green: Doing well, optimize and maintain.

Step 6: Add to Job Descriptions

Once your Core Values have been crafted and the specifics detailed, it is time to start applying them to the job descriptions of your staff.

For each job description within your organization, update the job description to include the Core Values, replacing the specifics from the organizational level to detailed and practical description of what it means to live out this value in each specific role. The goal is to have a description to which you can coach an employee.

Each job description should then have a Core Value description that includes each of the values and **what it means to Meet Expectations, Exceed Expectations, and Fail to Meet Expectations.**

Step 7: Communicate, Communicate, Communicate

Once you have completed the Core Values and applied them to each role within your organization, it is time to communicate the Core Values to your organization. Communicating Core Values should be done if at all possible in-person and with room for questions and dialogue.

Contact us to request detailed coaching on communication strategies for Core Values within an organization.



Step 8: Coaching & Accountability

Creating culture within an organization is a lot like creating character in an individual: it is best done with intentionality and takes time.

During each performance evaluation cycle, the Core Value Role Specific Descriptions should be a central part of the evaluation process.

Every employee (including the top executives!) should be evaluated by how well they lived into the values during the evaluation period, given specific coaching and feedback based on whether they met expectations, exceeded expectations, or failed to met expectations as described in Step 6: Add to Job Description.

Consistent and actionable feedback and/or reinforcement of the Core Values description in each role will provide a practical and instructive path for your employees to start living into the Core Values, helping create a thriving culture.

In addition to being able to provide feedback to your current employees, the Core Value Description included in each job description provides guidance on who to hire and who to fire to grow and protect the culture.

Pro Tip: Create a 360 Degree Feedback Culture

Organizations that foster 360 degree feedback will have an easier time installing value driven culture and better understand how their leadership is being experienced by their employees.

Leaders who model how to receive feedback well by enacting a 360 degree feedback culture will also have an easier time providing feedback as the employees will have seen their leaders model it.



Step 9: Model The Core Values Both Behaviorally and Strategically

Finally, model the Core Values as a leadership team both in personal interactions with your teams and in strategic decisions that influence the direction of your organization.

The strategic direction of your organization should be as heavily influenced by your Core Values as it is by your mission or bottom line revenue goals if you wish to have a value driven culture.

A lack of adherence to your Core Values at the top will create a crack within your organization's culture that will eventually fracture your culture to the foundation.

Pro Tip: Every leadership role should include within its Core Value descriptions some version of how that leadership position models the Core Value to their team.

Step 10: Celebrate Core Value Modeling and Success

Thriving organizations know how to celebrate!

Seek out opportunities to celebrate when a member of your organization or a team lives out the Core Values in a powerful way. Doing so will keep the Core Values a central part of what success looks like within your organization.

And who doesn't love a celebration!



Thank You!

Looking for more resources or a professional facilitator to guide your team through strategic conversations?

We are here to help.

Contact us for availability or to join our wait list. Our current Strategic Planning wait list is ~3 months out.

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