

Root

Development Guide

• Vision • Mission • Core Values

Congratulations for committing to develop Root Statements!

Developing compelling Root Statements is not for the faint of heart. It requires serious reflection on your deeply held beliefs and values. If you find your thinking going in circles or vacillating, just know that is a normal part of the discovery process. This document will help to bring you clarity.

You will need to have deeply personal discussions with your mentors and others close to you. Business partners should do this together. It's good to have your spouse or a close friend review your work. Most people cannot do this process without someone to guide them through it. You will also need the input from those who know you well to help you understand yourself.

As you zero in on your Root Statements you may need to make some tough decisions. Not everything can be a number one priority. You will need to say "No" to some things. Take courage and make the tough choices. Deciding what not to do is just as important as deciding what to do.

It takes perseverance to develop root statements that are meaningful to you and effectively communicate your passion to others. The hard work is well worth it, though. This is one of the best investments you can possibly make in your business.

Blessings on your journey of designing your future.

Vision Statement

Your higher purpose, the reason your organization exists.

This is your why, the difference you make in the world. This primary root goes deep to the water source and provides energy to keep growing when the short term is dry. It is a clear picture of the new future you intend to create. A compelling Vision Statement reaches for the stars. It should inspire allegiance to your cause.

Your vision statement should be a short sentence or phrase.

Questions to Consider

1. If you had all the time in history and all the money in the world what would you set out to accomplish?
2. How will the world be a better place when your vision is realized?
3. How will your organization change the world?
4. What part of the world?
5. Who will be affected?
6. What benefits will they realize?
7. What signs will you look for to indicate that your vision is becoming reality?
8. Is it possible for the vision to ever be fully realized?
(Yes or no is fine. You just need to know.)
9. What constitutes success?
10. What is your personal higher purpose (motivation) to pursue this vision?

Mission Statement

The practical way to move toward the vision.

This is what we commonly see as business— building houses, repairing cars or baking cakes. It should identify your daily operations and how your customers benefit. Your mission statement should the day to day operations that will move you toward the vision.

Your mission statement should be one to three sentences.

Questions to Consider

1. What is the overall business plan to move toward the vision?
2. Who is your target market?
3. What problem will you solve for your target market?
4. What products and/or services will you sell?
5. How will the activities of operations fulfill the vision?

Core Values Statement

Priorities for decision making.

Core Value roots spread wide and stabilize the organization in the daily winds of external influence. These values are the foundation on which we perform work and conduct ourselves. They are deeply ingrained principles that guide all actions. Everyone needs to live the Core Values so the vision and the mission can be realized.

Eliminate generic values that every business should have such as integrity and honesty. Your core values should address things that need to be respected in your organization that may not necessarily need to be respected in another organization.

Your core values should be a list of 3 to 5 short statements that identify your core values. Each value should be summarized by one or two key words. A sentence or two may be added for clarification.

Questions to Consider

1. What do team players need to appreciate and respect for the mission and vision to be realized?
2. What needs to be protected (prioritized) when decisions are made?
3. What is important to achieve your mission and vision?
4. List some things that you are willing to sacrifice to meet objectives?
5. List some things that you are not willing to sacrifice to meet objectives?

Core Value Development Exercise

1. Take a few minutes to envision key characteristics your team players will need to value and commit to for the mission and vision to be realized. Now, imagine your business as a person. What personality would it have? How would it carry itself? What character traits would it need to have as it goes to work on the mission and vision? Write down all the character traits and skills you can think of to describe this individual.

2. Test the strength of these character traits and skills you have written by asking the following questions for each one:
 - Is this a governing value that is so much a part of who this business is, that it needs to be protected when business decisions are made?
 - Can your mission and vision be achieved effectively and efficiently without this character trait or skill?
 - Is this character trait or skill important to the operational business I envision when it is effectively accomplishing the vision and mission concepts above?

3. Narrow your values down to the top 3 to 5 core values that are most important.

4. Summarize each value with one or two key words.

Root Statement Evaluation

Use these questions to assess the strength of your Root Statements.

Vision Statement Evaluation

1. Does it inspire you?
2. Do others catch the vision when reading it?
3. Does it reach for the stars?
4. Is it easily memorized?

Mission Statement Evaluation

1. Does it clarify the nature of your organization and day to day operations?
2. Does it communicate the benefit your customers experience?
3. Is it one sentence or a short paragraph?

Core Values Statement Evaluation

1. Will promoting these values create good decisions?
2. Would a person who holds these values make a good team player?
3. Is there anything that is more important to ensure the success of the mission and vision?
4. Can you summarize each value with one or two key words?