

Values Worksheet

Roy Disney said, “When your values are clear to you, making decisions becomes easier.” With that in mind, we’ve developed this worksheet to help you develop your values. This can be used as a personal, family, business, or ministry resource. This could be done in most settings, but we encourage you to give yourself plenty of time to work through this process.

Start big, start open

- Using a dry erase board/flip chart, gather your team (family, leadership, friends).
- Start brainstorming ideas of what you’re known for.
- Write these words and phrases down on the dry erase board.
 - At this point don’t say “no” to anything.
 - As you write, take note of common answers.
 - These can be things you’re known for or things you want to be known for.
 - Remain at the “30,000 foot” view – this is also a good time to hear what your people think.
- Depending on the size of your team, you could end up with anywhere between fifteen and thirty words or phrases – that’s great! In the coming steps we’ll look to narrow that down and really hone in on your values.

Ask the tough questions

- This is where you’ll start narrowing down your responses. Your goal at this point will be to get down to eight to ten words or phrases.
- Going one word or phrase at a time, ask if that word or phrase really defines your family or organization, or if it’s more of an aspiration.
 - Remember to allow for open discussion as your team processes.
- As you go through each word or phrase, I encourage you to:
 - Erase or line out anything your team has decided does not represent your organization.
 - Underline or box anything that might be something that represents your organization.
 - These could be aspirations or your team may just need time to process them.
 - Circle anything your team believes describes or represents your organization.
- This is also a good time to connect common themes or ideas (i.e. if someone said “fiscal responsibility” and another said “social responsibility,” you could say “fiscally and socially responsible” if you believe those things represent your organization well.
- Take the circled and underlined words and phrases and distribute them back to your team. (Use whatever communication method that works best for your organization.)
- Have them each take some time to process/pray/think on each of those words and phrases.
- Have each team member come back with their top three or four words or phrases they feel best represents your organization – I recommend a 24-72 hour window.
- The hope is when your team comes back together the words and phrases chosen are similar and represent your organization well.
- Through follow up discussion, narrow it down to the three or four words or phrases you believe best represent your organization.

Organize, get concise, write, and live

- Take your finalized words or phrases and formulate concise statements that clearly state those values.
 - i.e. American Express has a value of teamwork so their statement is: “We work together, across boundaries, to meet the needs of our customers and to help our company win.”
- You want these statements to be concise, repeatable, and memorable.
- Publish them! Put these statements in your marketing, website, and most of all, around your office/workspace.
 - It’s just as important for the members of your organization to see these, know these, and live these as it is for any customer/client.
- Lastly, make your decisions based on these values.

Please visit ericfoshee.com for follow up coaching and let us know what you thought of this resource.