

Guiding Statements

Use the prompts in this worksheet to help you establish the three core guiding statements for your business. These are your Guiding Principles (also called Values), your Vision, and your Mission. This is where you truly begin the work of setting up your business for sustainable success.

Guiding Principles:

You start with your Guiding Principles because they function as your compass on your business adventure. If you are lost, cannot clearly see what is around you, and don't have a map your Guiding Principles will be what help you navigate and make decisions. These Guiding Principles will rarely change and therefore help ensure consistency in decision making, leadership, and growth.

Step 1: Brainstorm

Use the space below to let your brain run wild, no self-editing. Write down everything that comes to mind when you think about the Guiding Principles that you want to steer your business. Identify what matters most to you. What values do you want to be reflected in every aspect of your business?

Step 2: Filter

The next step is to filter your results of your brainstorm down to your top 3-6 Guiding Principles. Review the results of your brainstorm and use the following to help you filter your results:

- Combine related results. What is the common theme among them?
- Think about decision making; what key principles should guide how decisions are made by you and your team?
- Reflect on your personal priorities. Are any of your results strongly aligned with your personal priorities?
- Rule out the obvious, principles like “honesty” should be embraced by every business. Which of your results are unique to you and your business?

When you're done, write down the basic gist of each principle below. Even one word will suffice at this point.

- 1)
- 2)
- 3)
- 4)
- 5)
- 6)

Step 3: Write Clear and Actionable Statements

Your Guiding Principles should not be vague ideals, but clear, applicable guidelines that influence everything from your strategy to your daily operations. Reflect on how you want these unique principles to identify the way you and your organization conduct business. Keep each to one succinct sentence and write them below.

Vision:

If your Guiding Principles are your compass, your Vision is the destination, it's the big dream your organization is striving towards. Big dreams can take a while to achieve, so it is common for an organization's Vision to remain unchanged for 10 plus years, but it's not quite as immutable as your Guiding Principles. That is why your vision is the next step which is informed by your Guiding Principles.

Step 1: The New Future

Every business exists to make the future look different from the present. This could mean a world paradigm shift, or maybe a new future for your individual life. Most importantly, be honest. What is the new future your business wants to create?

Step 2: Your Business' Role

What is your business' role in making this new future a reality? Think in terms of broad, abstract actions, fight the urge to be too specific at this stage.

Step 3: The Impact

How is your business' role going to make the the new future happen? What is the big outcome of you business fulfilling its role?

Step 4: Put it All Together

Using your answers above write a concise Vision Statement. You can use this formula to craft your statement, or as a starting point to help you craft your own if needed. "We envision (New Future), by (Role) to (Impact)."

Mission:

Your Mission is where you begin to drill down into not only where your business is going, but how it's going to get there. If your Vision is where you want to go, your Mission is what you're doing right now to get there.

Step 1: The Outcome

What single outcome would take the biggest step in moving your business closer to the Vision? Write it down in the space below.

Step 2: The Action

What action does your business need to take to accomplish the goal you wrote down above? Write it down the space below.

Step 3: The Impact

What impact will achieving this goal have? Think outside of your business, what's the impact on your clientele, on the problem you identified? Write it down in the space below.

Step 4: Mission Statement

Now put your three above answers together into a 1-2 sentence statement to create your mission statement below. You may want to start with this basic formula, "Our mission is to (insert objective) by (insert action) for (insert impact)."