

5 STEPS TO ALIGN YOUR TEAM WITH YOUR CORE VALUES

A Practical Workbook for *Small Business Leaders*

WHY CORE VALUES MATTER

1. Core Values as Culture Builders

Core values define how your team collaborates, engages, and strives toward shared goals. This section introduces how clearly defined values shape your team's daily actions and long-term commitment to the company's vision.

2. The Unique Challenge for Small Teams

In a small business, every role impacts the culture significantly. Misalignment or confusion about values can lead to disengagement, which is why it's essential to have each team member understand and buy into the core values.

3. What You'll Gain from This Guide

This guide will provide clear, actionable steps to create a unified, high-performing team culture that's resilient, productive, and aligned with your company's mission.

Let's dive in...



STEP 1

Define and Communicate Clear, Actionable Values

- **Understanding Values Beyond Words**
- Core values need to be practical and actionable. A value like "Trust" must translate into everyday actions, such as following through on commitments and supporting each other's roles.

Activity: Values Workshop

- **Objective:** To collaboratively define each core value in a way that's clear and actionable.
- **Instructions:**
 - **Team Discussion:** Gather your team and present each core value. Ask each person to describe what that value looks like in action.
 - **Document Examples:** Create examples for each value. For example, "Accountability" might mean "Communicate clearly if you're going to miss a deadline."
 - **Summarize:** Summarize each value with a phrase or behavior that everyone can remember and apply.
- **Reflection Questions:**
 - Does each value have at least one clear behavior associated with it?
 - Are these examples meaningful to everyone on the team?




STEP 2

Build Open Channels for Feedback and Transparency


The Role of Transparency

- Open communication builds trust. Encourage a culture where feedback flows freely, making it easier to identify and address issues early.

Exercise: Set Up a Feedback Loop

- **Objective:** Establish a routine for collecting and acting on team feedback.
 - **Instructions:**
 - **Schedule Regular Feedback Sessions:** Hold monthly feedback meetings where team members can discuss challenges, suggestions, and successes.
 - **Create Safe Spaces:** Start with anonymous feedback if necessary to help team members feel comfortable.
 - **Action on Feedback:** Choose one actionable takeaway from each meeting and follow up in the next session.
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Reflective Prompt:

- How can you demonstrate to your team that their feedback is valued and acted upon?
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STEP 3

Embed Values into Daily Processes and Decision-Making

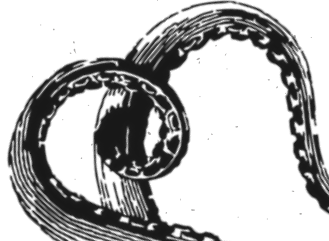
Values as Everyday Guideposts

- Embedding values into decision-making ensures they become a consistent part of your team's work, not just ideals on paper.

Checklist: Values-Based Decisions

- **Objective:** Use a values-based checklist to align daily actions with core values.
- **Checklist Items:**
 - Is this decision consistent with our core values?
 - How does this action support or reflect our values?
 - Can we improve our approach to better align with our values?

Practical Step:

- Implement a "value of the week" and ask team members to share how they applied it in their work. Recognize efforts and invite examples in team meetings.
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STEP 4

Develop a Continuous Training and Development Program

Continuous Development

- Invest in training aligned with values to help your team continuously grow in areas critical to their roles and the culture.
- **Objective:** Reinforce values through regular skill development sessions.
- **Steps:**
 - **Identify Core Skills:** Choose skills directly connected to values, such as communication for “Transparency” or customer service for “Respect.”
 - **Schedule Quarterly Workshops:** Plan development sessions around these core skills.
 - **Encourage Personal Goals:** Allow employees to set their own development goals that support the values.
- **Reflection:**
 - Are training sessions helping team members embody values more fully?
 - What adjustments could reinforce values through training?

STEP 5

Set, Track, and Communicate Goals that Reflect Core Values

Goals Aligned with Values

- Aligning team goals with values makes daily work feel meaningful and connects each task to a larger purpose.

Worksheet: Goal Alignment Exercise

- **Objective:** Set measurable goals that reflect core values.
- **Instructions:**
 - **Quarterly Goal Setting:** Hold a goal-setting session every quarter. Have each team member align their goals with at least one core value.
 - **Create a Progress Tracker:** Set up a tracker where the team can visually monitor progress.
 - **Celebrate Wins:** Recognize accomplishments tied to values regularly to reinforce their importance.
- **Quick Tip:**
 - Consider a team ritual, like a quarterly “values spotlight,” to celebrate achievements linked to core values.

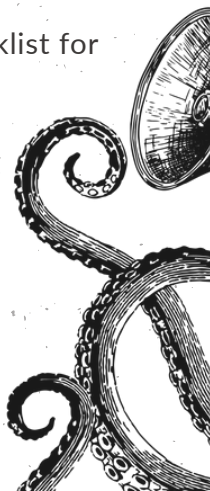
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BUILDING A CULTURE THAT LASTS

- 1. Consistent Reinforcement:** Summarize how these steps help foster a culture where core values drive engagement, accountability, and productivity.
- 2. Commit to Continuous Alignment:** Encourage leaders to revisit values alignment regularly, adapting as the team grows.
- 3. Next Steps:** Invite readers to start with the values workshop and use the feedback loop as a foundation for an aligned, empowered team culture.

APPENDICES AND RESOURCES

- 1. Values Workshop Template:** A step-by-step guide with prompts for team discussions on core values.
- 2. Feedback Loop Guide:** Sample agenda and conversation starters for effective feedback meetings.
- 3. Values-Based Decision Checklist:** Printable checklist for daily decision-making aligned with values.
- 4. Goal Alignment Worksheet:** Template for setting quarterly goals tied to core values.



APPENDIX 1

Values Workshop Template

Objective: Create clear, actionable definitions for each of your core values with input from your team.

1. Preparation

- **Select Core Values:** List your company's core values (e.g., Trust, Accountability, Growth, Engagement).
- **Gather Team Members:** Include diverse roles to get a variety of perspectives.

1. Workshop Steps

- **Discussion:** For each value, ask team members:
 - What does this value mean in practice?
 - How would you know if someone is embodying this value?
- **Document Examples:** Write down specific, observable behaviors that represent each value.
 - Example for "Accountability": "Delivers work by the deadline and communicates any delays in advance."

1. Summary and Action Steps

- Create a document with clear examples of each value in action.
- Distribute this document to the team and post it in a visible area of the workplace.

APPENDIX 2

Feedback Loop Structure

- **Objective:** Set up regular feedback sessions to encourage open communication and trust.

1. Schedule Regular Feedback Meetings

- Hold monthly or quarterly sessions where team members can share feedback openly.

2. Meeting Agenda

- **Start with Positives:** Each member shares something positive about the team or the culture.
- **Feedback Round:** Discuss areas where values could be better upheld, in a constructive and specific manner.
- **Action Items:** Identify one action step each team member can take based on the feedback received.

3. Follow-Up

- Document the action items and review them in the next feedback session to ensure accountability.

4. Anonymous Feedback Option

- Consider an anonymous survey for initial feedback rounds to encourage honesty and build trust.

APPENDIX 3

Values-Based Decision-Making Checklist

- **Objective:** Ensure that decisions reflect and reinforce core values.

1. Decision Checklist

For each decision, ask:

- Does this decision align with our core values?
- How does this choice support our value of [e.g., Trust]?
- Are there ways to adjust this decision to better align with our values?

2. Example Use

- When hiring: "Does this candidate demonstrate our values in their past work or behavior?"
- When launching a new project: "How does this project reflect our commitment to customer focus?"

APPENDIX 4

Goal Alignment Worksheet

- **COBjective:** Set and track goals that support core values and ensure accountability.
- **Goal-Setting Workshop**
 - **Define Quarterly Goals:** Each team member identifies goals that align with one or more core values.
 - **Link to Values:** Write down how each goal supports a specific value. For example:
 - Goal: "Increase customer satisfaction by 10%."
 - Aligned Value: "Customer Focus."
- **Progress Tracker**
 - **Create a Visible Progress Chart:** Use a shared board or digital tracker where team members can update their progress.
 - **Celebrate Wins:** Acknowledge progress on value-aligned goals in team meetings.
- **Review and Reflect**
 - At the end of each quarter, review each goal. Discuss what worked, what didn't, and how well the goals reflected core values.

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HOW IT WORKS

We make it simple to break free from the frustrations holding you back.

Step 1 - Discover

Schedule a call to diagnose the root issues in your business or team.

Step 2 - Implement

Apply proven frameworks and strategies tailored to your goals.

Step 3 - Thrive

Experience growth, freedom, and a renewed sense of purpose in your business.

TAKE THE FIRST STEP →

