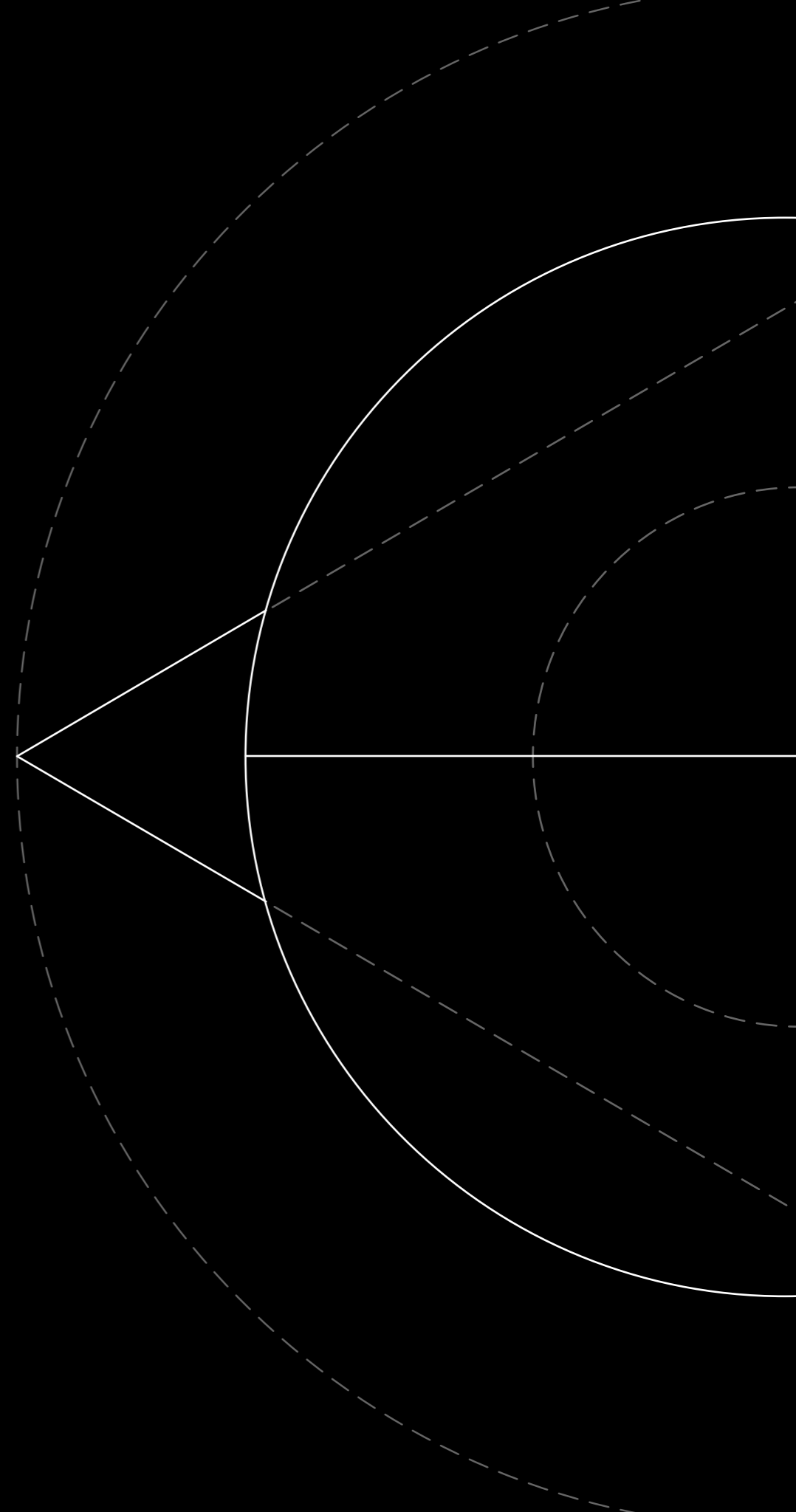




Setting Direction

A GUIDE TO DESIGNING
YOUR CORE BELIEF SYSTEM

Excerpt from the book: Culture-Bending Narratives
whiteboard.is



Years ago, Whiteboard met with an organization that was doing incredible work throughout the United States. The work was going so well that they wanted to branch out into other countries. However, to do that, they thought they needed to start a new nonprofit to serve the global market. This struck us as odd. Why not just change your strategy? Start a new division? Open an office in Tokyo?

As it turns out, the founding mission of the organization was written in such a way that it also included strategic elements. As a result, the mission was to serve only North America. They were right; it was easier for them to start a new organization than to update their charter.

Another time, we met with an organization that was finding it difficult to communicate about their work. When we dug in, we found that the organization had no real set of belief statements to tether them. Because they had not properly defined how they were going to operate, anything they wanted to say simultaneously did and did not make sense.

These two short stories exemplify something we encounter again and again—operational statements that are:

1. Intertwined, *making it difficult to operate or pivot.*
2. Vague, *making it hard to effectively manage.*

Over and over at Whiteboard, we have found that a set of strong beliefs, properly framed and articulated, set the foundation for a strong brand. As you wrestle with your Five Core Beliefs, you need to turn inward and examine your belief system, get practical, and design your organization.

Five Core Beliefs

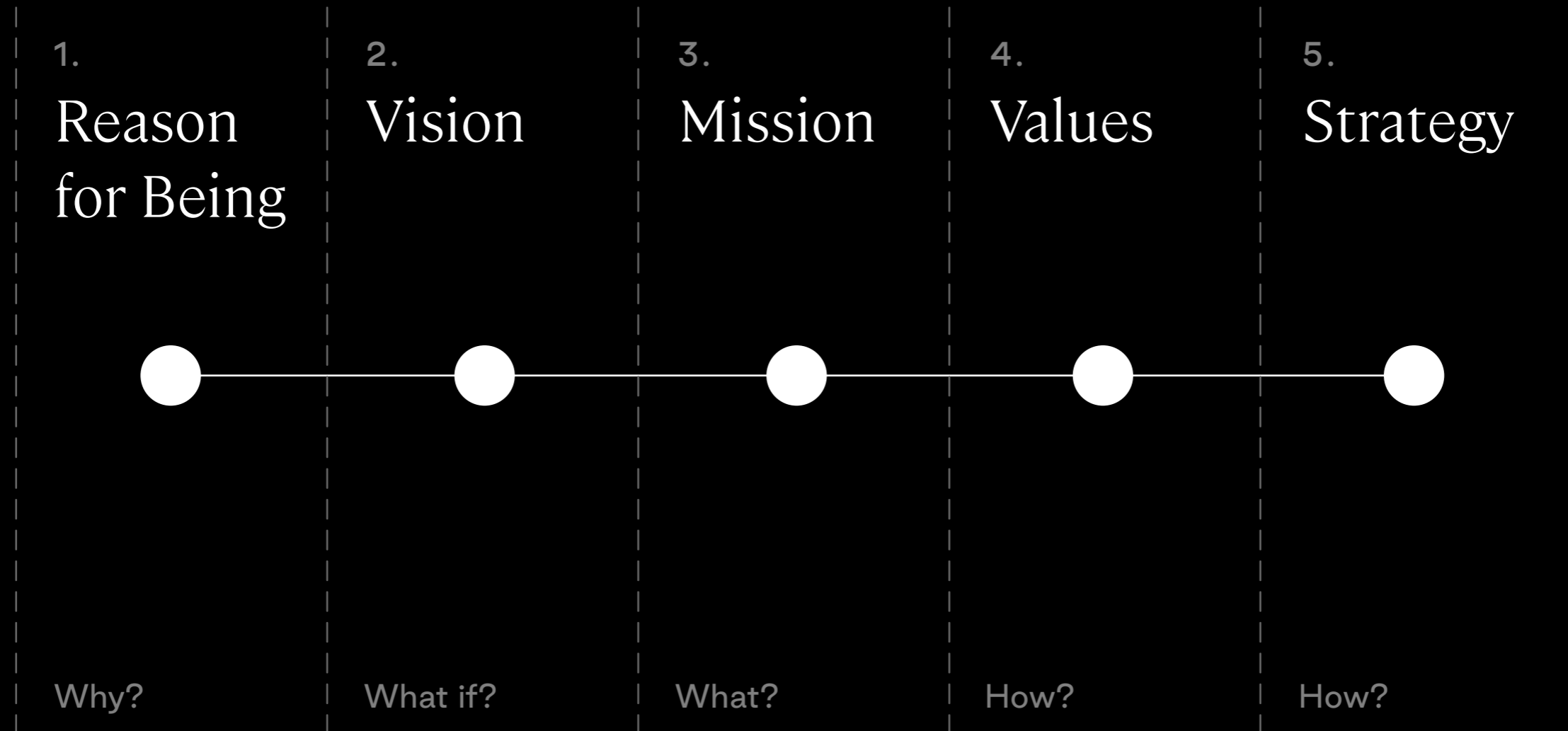
There are five belief statements that you will need to work through to properly define your work and set a strong foundation for your narrative. These statements are not uncommon, but they need a healthy evaluation in order to set up your narrative for the best chance of success.

As you develop these core beliefs, understand that the work of defining them does not unfold in a linear sequence. Instead, each statement informs the others, and there is a constant back and forth between the statements.

With your Vision sketched out, you will move on to your Mission. But in working on your Mission, you will think of things that lead you to refine your Vision. In updating your Vision, you will find that your initial Mission needs evaluating, and this means your Strategy will need updating, and so on.

In addition, we suggest that you allow the thinking behind your *Reason for Being* to weave itself into the entire set of beliefs. This ensures that the purpose of the organization is not an afterthought.

FIVE CORE BELIEFS



1. Reason for Being

Have you ever asked yourself, “What’s our purpose? Why do we do what we do?” We find that entrepreneurs excel at asking, “What is the what?” but few ask, “What is the why?”

At a core level, each one of us longs for purpose in our lives, and if we dig deep enough, we are faced with asking ourselves whether our work matters. Is it more than a paycheck or an avenue for personal satisfaction? We think the answer is yes, and we bet if you are starting a social enterprise or nonprofit, you think so too.

Yes, your work matters.
What you make matters.
How you make it matters.

One of the primary ways that we take responsibility for the world is through our work. So as we work, we are using our time, talents, and energy to respond to the needs of the world. In this, we find purpose.

This purpose is much deeper than a personal driving factor. Your purpose should sit at the core of your organization and weave itself into all that you do.

So ask yourself: Why does your organization exist?

Whatever your answer, it should move beyond profits, products, or services. Your Reason for Being captures the heart of your organization, and it is the essence of why you have chosen to do what you do. Your exploration will help produce and guide your narrative.

Business author Rosabeth Moss Kanter sums it up well: “Great companies identify something larger than transactions or business portfolios to provide purpose and meaning. Meaning-making is a central function of leaders, and purpose gives coherence to the organization.”

Not only does your Reason for Being communicate the purpose of your work, but it also exists to help you explore the common issues that surround your work and how you think about those issues. As a nonprofit or social enterprise, it’s easy to stop at the most obvious reasons for your work.

You might say, “We want to see poverty eradicated,” or “We want to feed people,” or “We want to give work to women in Asia.”

These are all great starts to discovering your organization’s Reason for Being. But if you go deeper, what do you discover? Why is there poverty? Why are people hungry? Why are women in Asia not working?

Our Reason for Being should attempt to answer these broader questions so that we can address the core of the problem inside of our purpose. This is where a healthy understanding of our three core questions can help us. You can see now why we spent time asking ourselves, Where have we been?

Examining these questions and discovering your Reason for Being is a bit of a heady exercise. It demands hard thinking and a forming of philosophies that shape the way you see the world and choose to respond to it.

As you think through this, continue to ask yourself: Why?



UP NEXT: *“Reason for Being” exercise*

As we work, we are using
our time, talents, and
energy to respond to the
needs of the world.

In this, we find purpose.



REASON FOR BEING

Finding your Reason for Being looks a lot like a philosophy exercise. Take some time to dig in and ask yourself why your organization exists. For each answer, dig deeper by asking “why?”

Why does your organization exist?

Why does that matter?

2. Vision

As you look out to the future of your organization, what do you see? This is the beginning of the Vision for your organization.

The *Vision Statement* answers:

What will the world look like if I accomplish my mission?

Practically speaking, the Vision Statement is the three, five, or ten-year future state of your organization.

Traditional thinking says you should be able to measure and attain what you articulate in your Vision Statement. Organizations tend to get stuck thinking, *Well, we need to deal in reality. So our vision must sound plausible, reachable, and measurable. If we get too creative with it, we won't be able to tell if the vision is coming to fruition.*

Of course, the Vision Statement could be those things. You could package it in a way that feels plausible and measure it along the way. But what good is a Vision Statement that sounds neat and attainable? Changing the world is no easy task. We don't think the Vision Statement should sound plausible. If it does, then perhaps you aren't thinking big enough.

Small thinking doesn't change the world. Crazy changes the world.

So think crazy.

Think audacious. Leave plausibility to the other guys, and let the impact of your work make believers.

Eventually, you need to move your crazy vision from your heart to paper. As you work on it, don't be afraid to use bold language that draws people to your work and energizes your organization. Excite and inspire your audience to buy into something much bigger than any one individual could achieve.

Let the tension of the plausibility create excitement for your work and a sense of hope that you can pull it off. When you inspire people to buy into crazy, you will create something dazzling.

As you start forming this statement, you will want to do a gut check to ensure that it moves people toward buying into the vision. To do so, filter it through these six lenses: Outward, Inspiring, Specific, Challenging, Clear, Inclusive.



UP NEXT: “*Vision Statement Pre-Work*” exercise



VISION STATEMENT PRE-WORK

As you work on your Vision statement, let your imagination kick in. Use what you see in your mind's eye to capture the essence of your Vision. On the next page, write it in big, bold language that draws people to your work and energizes those around your organization. Let the tension of the plausibility create excitement for your work and a hope that you can pull it off so that others are rooting for you.

When you are finished, look back at what you wrote and draw a symbol over the words that represent the six lenses discussed in the Vision section. Make sure all lenses are represented.



OUTWARD

Is your vision focused on the community you serve and not your organization?



CHALLENGING

Does the vision seem easy to accomplish? Or, is it ambitious and audacious?



SPECIFIC

Can your team translate the vision down to their specific job or task?



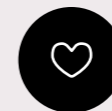
INSPIRING

Does your vision draw others to rise to the occasion? Are they rooting for you?



CLEAR

Can someone easily repeat the vision back to you? Not word-for-word necessarily, but the big idea.



INCLUSIVE

Does the language assume a team effort by using "we" or "us" or "our" in unifying all involved?



VISION STATEMENT PRE-WORK (CONT.)

Just start writing; this is not a final draft.

3. Mission

The job of the *Mission Statement* is to answer the what of your organization. As much as the Vision needs to avoid specifics and measurables, the Mission needs to capture those things. The simpler it is, the more you can avoid mission creep later. One of the best formulas for a strong, simple mission comes from the Mulago Foundation Executive Director Kevin Starr. Mulago funds organizations that tackle issues that affect the world's poorest families.

Almost any organization can use Starr's formula as a baseline for their mission statement. Starr argues for expressing the mission in eight words or less using a verb, target population, and an outcome that can be measured (see Mission Statement Formula on page 11).

This formula forces clarity and specificity. Clarity comes from stripping away flowery adjectives and industry jargon that can confuse the reader. Specificity comes from including only the kind of information that answers the "what" question of your organization.

Organizations often use words and phrases like "empower" or "change attitudes." While these may serve as important steps to achieve a desired outcome, they are not the final outcome. So when thinking of outcomes and impact, keep things concrete. If you stick to real, tangible outcomes, you are forced to think of things that can be measured and that can prove the impact of your organization.

Starr writes, "A good eight-word mission helps startups to evolve their big idea without getting pulled off track by their business model, the demands of funders, or the latest shiny object they found by the side of the road. For more established organizations, it can be a guide through a necessary iterative process of redesign, helping them strip the hull of all the barnacles and unnecessary appendages that have accreted on the voyage so far."



UP NEXT: *"8-Word Mission Statement" exercise*

MISSION STATEMENT FORMULA

Verb

Begin with a verb. Pick one action that represents the work of your organization. Some good examples are “Save,” “Educate,” and “Build.”

Target

Name the group who feels the impact of your organization. Be concise.

Outcome

Convey your desired outcome. Based on your mission statement, the reader should understand how success is measured for your organization.



8-WORD MISSION STATEMENT

The job of the Mission Statement is to answer the what of your organization. As much as the Vision needs to avoid specifics and measurables, the Mission needs to capture those things.

VERBS

List as many verbs as you can think of that describe your work.

TARGETS

List as many targets as you can think of that are impacted by your work.

OUTCOMES

List as many outcomes of your work as you can think of.



Using the list on the previous page, start combining verbs, targets, and outcomes to create drafts of your mission statement.

4. Values

In a purpose-driven organization, the *Core Values* align with the rest of the *Core Beliefs*.

Core Values create a definition of who you are and encompass the universally applied non-negotiable behaviors of an organization.

They move you from “Why?” and “What if you did it?” to how you are to operate in the day-to-day. These values and how they manifest themselves are what makes your organization unique.

Author and management expert Jim Collins defined Values this way: “... inherent and sacrosanct; they can never be compromised, either for convenience or short-term economic gain.” Typically, your Values derive from the operating behaviors of the leadership team or founder.

These values are distilled into the three to five Core Values that can be defined by a short phrase. The definition gives the Value context within your organization and answers the question, *What does it mean to work here?*

If you don’t define the Value as it relates to your organization, you are leaving it to the team or individual to define based on their past experiences and interpretation.

Keep in mind that there are other types of values often perceived as core values but are actually something different. Business management author Patrick Lencioni calls these Aspirational Values, Accidental Values, and Assumed Values.

Aspirational Values are values that you see as essential but aren’t yet realized within the organization. Accidental Values bubble up naturally through the commonalities of the team or the shared culture. These two types of Values operate on a different layer than the Core Values. They may appear as Core Values if they have implanted themselves as a result of the organizational culture or social landscape. In reality, though, they are not.

Assumed Values, on the other hand, operate on the same layer as Core Values but do not represent something specific to your organization. Like Aspirational and Accidental, Assumed Values exist in addition to the Core Values but are not explicitly stated. Often, they are values that society or your industry recognize as normal.

For example, a common Core Value that an organization may claim is integrity. But everyone would say that they want to hire people with integrity. There is no distinction here. This doesn't mean that integrity can't be a Core Value. But ask yourself this: Would you really hire someone without this quality, even if it was not formally stated as a Value? If the answer is no, then perhaps you are not looking at a Core Value but instead an Assumed Value.

Finally, as you consider your Core Values, think about how they function in your organization as an operational framework. To really make a difference, your Values must be instilled into the entire organization. In this way, the Core Values give employees a framework for operating and decision-making.

People only implement what they really believe in. Jim Collins goes so far as to argue that you cannot force people to buy into Values; they must be predisposed to holding them. Living by Values, however, can be painful. They crash against the reality of operating an organization.

As Lencioni noted, "If you're not willing to accept the pain real values incur, don't bother going to the trouble of formulating a values statement. You'll be better off without one."

Remember, Values matter because they answer the question, What does it mean to work here? Don't get sidetracked with creating values that don't answer that question. Focus.

To embed your Values into the whole of the organization, you need to manage, monitor, and reward them. You want your Values to be the operating manual for working at your organization. Words on the wall look nice but mean nothing if we don't invite the rugged accountability they demand.

To really make a difference,
your Values must be instilled
into the entire organization.

5. Strategy

When the theory of your Vision, Values, and Mission meet the practice of your organization, then you have Strategy. Your organizational Strategy answers two primary questions:

- ♦ *What is unique in how I am addressing the problems?*
- ♦ *How am I going to get this work done better than anyone else?*

The answers to these questions relate to the rest of your Core Beliefs—you are now stating how they will be actualized into your work.

Your eight-word mission might state that you exist to “improve the education of underprivileged kids.” Great. How are you going to do that? Well, your Strategy could look like any number of things: coaching teachers, starting schools, or making instructional videos for students. In other words, the Strategy addresses how you are best suited to tackle that work.

In the past, Strategy meant plotting a future state for your organization, then reverse engineering a route to that future state. In this paradigm, an organization developed a destination and a road map, then stuck to the directions and plowed ahead, never looking around to see how the landscape might be changing.

Strategic Thinking

What’s the best way to approach the problem?

Strategic Planning

What resources will it take to implement the approach?

Strategic Execution

How will the approach materialize, and who is responsible?

Today, heading down the same road without questioning the best route along the way is foolish. The world is too connected, too fast, and too dynamic. In response, your strategy must be focused and agile. You must think in one- or two-year increments and adjust to market and social conditions as you move forward.

Strategy is the best way to do the work in front of you with everything you know today. And the quicker what you know today changes, the more adaptive your Strategy needs to be. So how do you develop your Strategy?

You will need to ask yourself three separate and distinct questions. The whole of the exercise allows the answer to one question to impact the answer to another. In the end, you will form a complete picture of what it takes to execute your Strategy.

Good Strategy forces choices: *We do this but not that.*

These choices (thinking) become the boundaries of your work and give you focus. However, these choices must consider the resources (planning) it will take to get the work done

(execution). If your Strategy doesn't account for resources, then you don't have a Strategy; you have a dream. Fencing in your organization is key to effectiveness (or longevity) as it keeps you from chasing too many things and losing focus.

Michael Porter, business strategist and Harvard professor, says it this way: "The essence of strategy is that you must set limits on what you're trying to accomplish. The company without a strategy is willing to try anything. If all you're trying to do is essentially the same thing as your rivals, then it's unlikely that you'll be very successful."

The most interconnected organizations allow their organizational strategy to influence their narrative while allowing their narrative to influence their strategy.

As you lay out your narrative for your audience, listen for what captivates their attention. Those things may not be part of your Strategy, but perhaps they should be. Your narrative is more than a tagline on your website; it's the entire activity and expression of your organization.

EMBRACING CHANGING BELIEFS

An Ongoing Evaluation of Your Five Core Beliefs

The world is changing at a dizzying pace. New understandings of culture, access to data, and technology all make it necessary to evaluate what your organization understands and believes. Because of this, you need to set a regular rhythm of evaluating your organization’s core beliefs and adjusting them as necessary.

1. Reason for Being	2. Vision	3. Mission	4. Values	5. Strategy
---------------------------	--------------	---------------	--------------	----------------

EMBRACING CHANGING BELIEFS

REASON FOR BEING

In the day-to-day grind of the organization, it can be easy to forget why you are doing what you are doing. At its simplest, evaluating the Reason for Being serves as a shot of energy and life. At its loftiest, an evaluation ensures that the purpose of your organization is still being realized and all new initiatives are tethered to this core statement.

VISION

As you learn more about your industry and answer the “Where have we been?” and “Where are we now?” questions, you will start to imagine the world in new ways. Check the Vision against the Three Core Questions to ensure you are still headed where you want to go. If not, then course correct. Minor course corrections should allow you to keep your Mission intact

and may be just an extension of the Vision. However, major updates may impact the Mission so much that the organization needs to pivot, shut down, or totally reboot.

MISSION

At the founding of your organization, the Mission will change as you find your bearings. However, it should solidify over time and become more rigid. If you still find yourself tweaking the Mission 24 months after starting your organization, then that’s a red flag. The Mission itself may not be well-defined, or your Strategy may be too woven into the mission. Once the Mission is in place, the ongoing evaluation is simply to check for relevance of language.

VALUES

With few exceptions, your Values are timeless and should not change. However, how those Values are operationalized should never stop changing. If you are considering a change in Values, then you may need to change your Reason for Being as well. In other words, if you still believe in your Reason for Being, your Values will reflect that.

STRATEGY

Out of all the Core Beliefs, the Strategy has the most permission to change with the most frequency. In fact, it should. You should have metrics to evaluate the ongoing effectiveness of your work, then pivot your Strategy according to what you see working and what is happening around you. Setting up a regular evaluation of the Strategy (as in annually) will help your organization focus on the right things.

Your Belief System is
the foundation of your
organization and all that
it does flows out of this.
A brand is most effective
when the beliefs, strategy,
and expressions all align.



We help leaders create digital experiences that advance their vision for *a brighter future.*

If you'd like us to help align your Belief System with your brand strategy, let us know. We'd love to meet you.

[Learn more](#) about Whiteboard or say hello@whiteboard.is



Want More?

In Culture Bending Narratives, Jason Locy, Partner & Head of Strategy at Whiteboard, takes you through the process of moving beyond the fundamentals of storytelling and into a deeper conversation around the power of narrative. [Buy a copy.](#)