



Strategic Planning: Values

Guidance for articulating values of a heart-centered business

VALUES

Values are the starting point for the rest of your strategic plan. I like to start strategic planning with values because they shape everything else in your business, and they define what is acceptable and what is not. They become a litmus test and a screening tool for everything from your long-term goals to your interactions with clients and stakeholders.

PREPARATION

Like all Unwhelming processes, we recommend that you take time to prepare for this work in a way that honors your mind, body, and spirit. Use breath to ground, ritual to set the tone, and meditation to guide intention.

Gather your supplies: pen and paper at the least, or if you're a big fan of sticky notes, I find them a great tool for this step. You'll need a big enough area to work in so that you can move paper around physically, or a big whiteboard or large sheet of paper where you can color code or otherwise visually differentiate different words and phrases.

Start by thinking about what makes you FEEL. Be ready to come back to this little question over and over and over. If you have found that being disregarded triggered Big Feels in you, it may be that you value validation--being seen, heard, and recognized. If being lied to sent you straight to rage, you can bet honesty will be on your list. Establishing your values is as much a process of clarifying what you don't want as what you do want.

Next, think about what you consider or have been taught are "traditional" business values. Those may be important to you, and that's totally fine; this is YOUR business, literally. But next, expand your thinking to values that guide your daily living. Even if those seem like "feminine" or "soft" values you can use them to guide work that is centered in love, community, and healing.



Strategic Planning Jumpstart: Values

writing prompts



FIRST DRAFT

Write all of these words or phrases on separate pieces of paper. This isn't the time to second-guess or censor, but do try to limit yourself to a single-word description or very short phrase wherever possible.

When you've exhausted your brain or find that you're repeating yourself, stop. Walk away. If you're stuck, take a break. Listen to some music that fires you up, move your body, and then come back to ask yourself, what's in this that excites me? Come back when you feel more inspired. Read all your words and sit with them for a minute or two.

SECOND STEP

Start to sort these words into categories, looking for patterns and similarities. Aim for five or six categories at the most. When you've got everything sorted, look at each category and see if it can be distilled into a single word or phrase that encompasses the category.

When you get to five or six words or phrases, you're done--for now. Sleep on these values and come back the next day. If they still resonate, you'll know it. If something doesn't quite fit, rearrange or shift until it feels just right.

RELEASE!

When all of this feels just right, you'll write your final values in big letters and post them where you can see them for a couple of days. Keep checking in to see if they align with your personal values and if you could see them on your website or annual report. If it all resonates with you, share them!

