



TEAM **LEADER** TOOLS

Team Vision and Values Tool



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Team Vision and Values Tool

Overview

What and Why

Team vision and values create the heart and soul of the team. They are not just words. Team vision provides a compelling picture of what success will look like. Team values shape the character and conduct of the team.

How

The following key actions can help you discuss, define, and live by the team's vision and values.

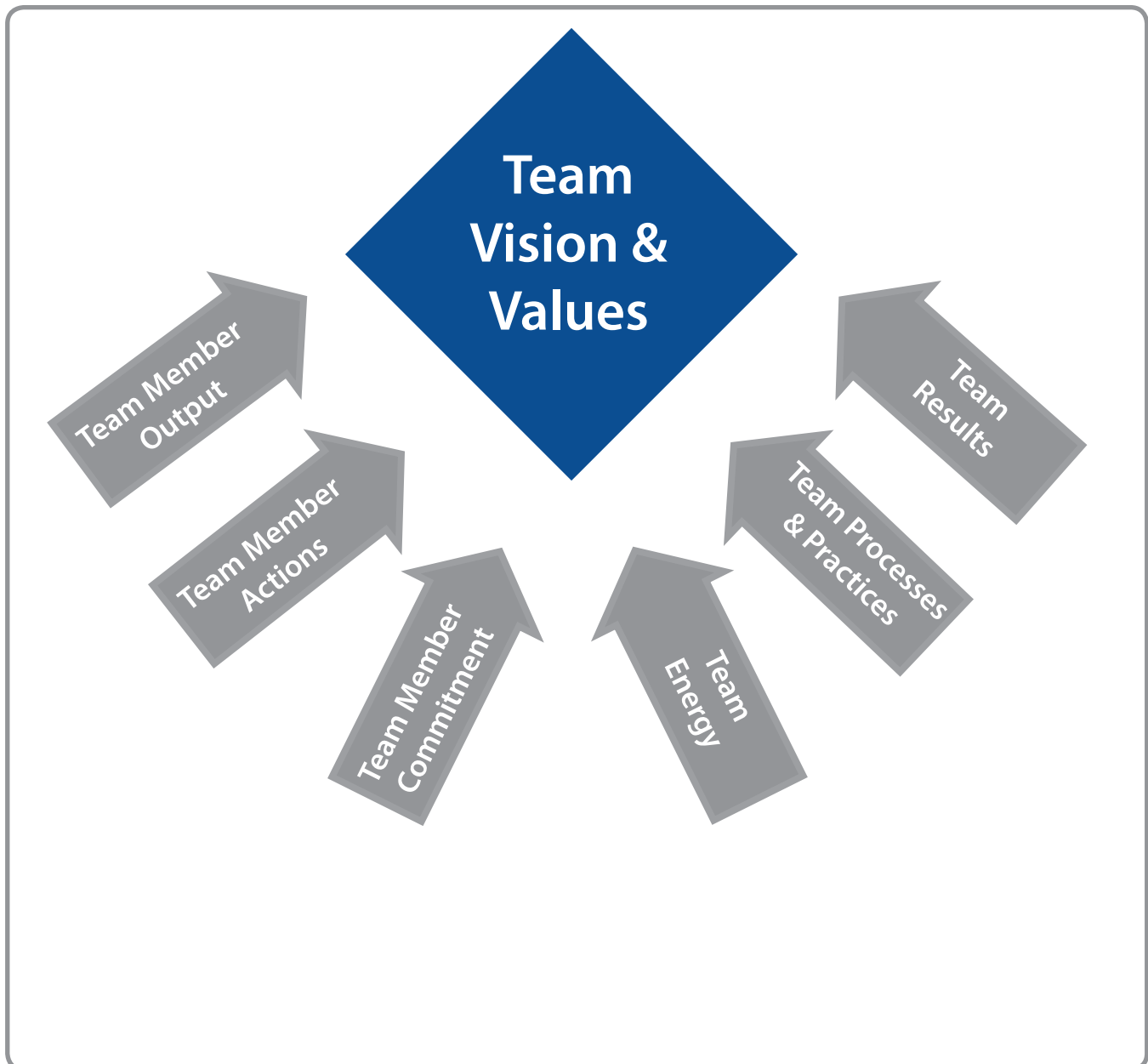
1. Prepare as a team to hold a rich and informed discussion on team vision and values.
2. Use the Team Vision and Values Creation Worksheet to discuss and create a team vision and set of team values.
3. Lead your team in applying the team's vision and values on a daily basis.
4. Use the Team Vision and Values Alignment Worksheet to review and discuss how well your team is aligned it's vision and values.
5. Help your team revisit its vision and values on a periodic basis.



Team Vision and Values

Worksheet

Team vision and values are not just words.
They define us, unite us, focus us and inspire us.
They are what we stand for and strive for.





Team Vision and Values

Definition

1. PREPARE for the TEAM DISCUSSION on VISION and VALUES

Prepare in advance for a team discussion on vision and values. Set a time and a place to hold a team discussion. Each team member should receive a copy of Team Vision and Values Tool so that they can prepare their thoughts prior to the team discussion.

TEAM VISION is a shared understanding and belief of what team success will look like and feel like. "We see success the same."

TEAM VALUES are brief statements that describe what is most important to the team, what the team stands for, and what will govern team priorities, decisions, and actions.

2. HOLD a TEAM DISCUSSION on CREATING VISION and CLARIFYING VALUES

Your team vision and values should be much more than words on paper. Your team vision and values should focus and inspire your team. The vision and values should be shared by all team members. They should flow through the veins of each team member and guide team actions.

Discuss as a team your "FUTURE STATE." As a team, write a paragraph that describes what "success" will look like as a result of achieving your vision and living by your values. Discuss as a team how it will feel to actually achieve the desired state. You may wish to draw an actual picture or diagram of the "future state."

Discuss WHY the vision and values are so essential. Who wins if your team achieves the vision and lives by the values. Why should there be such a passion for it? What value will come from it and who will receive that value? As a team, write a paragraph that describes the WHY.

3. HOLD a TEAM DISCUSSION on LIVING to VISION and VALUES

Discuss how your team can best apply the vision in its daily operations. Given the vision and values, what should the team and its members START doing, STOP doing, or CONTINUE doing? Discuss how the team can best remember and live by team values. How will you stay in alignment with your team vision and values? How will you use the vision and values to stay in alignment with key stakeholders and with the organization? How will the vision and values help you set team goals and define team roles?

4. REVISIT YOUR VISION and VALUES

Set time aside on a regular basis to review, revise, and refine your vision and values. Keep it relevant. Revise it as necessary. Renew your team's commitment to the vision and values.



Team Vision and Values

Creation Worksheet

VISION and VALUES CREATION DISCUSSION

Use this worksheet as a template for holding a team discussion on the vision and values that you will share as a team. What does success look like? What do we stand for? What will mean to us to achieve our vision and live by our values?

TEAM DISCUSSION

Here are a few questions to consider when creating team vision and values.

- What one-line phrase would best capture the essence of our team, its purpose as well as our vision of what success should look like?
- WHY is our team essential?
What value do we see ourselves providing and to whom?
- What is it that we have the most passion for?
- What will it look like and feel like to achieve our vision - to arrive at the desired future state?
- How will we measure success?
- What values are most important to us and why?
- How do our values factor into our success?
- What will be our work results?
- What will our customers and stakeholders be saying about us?
- How will we compare to our competition?
- What do we need to do to capture, document, and refine the most important parts of our vision and values discussion?

TEAM NOTES



Team Vision and Values

Alignment Worksheet

VISION and VALUES ALIGNMENT DISCUSSION

Once you have had a team discussion on vision and values, use this worksheet as a template for holding a team discussion on how to keep your team aligned with your team's vision and values on a daily basis?

TEAM DISCUSSION

Here are a few questions to consider when discussing your team's alignment to vision and values.

- How can we best publish and remember our vision and values. How can we use them to guide our team on a daily basis?
- How can we use our vision and values to stay in tune with our key stakeholders?
- How can we use our vision and values to stay in alignment with the organization?
- How can we use our vision and values to set team goals and review team progress?
- How can we use our vision and values to clarify team roles?
- How often should we revisit our team vision and values so that they continues to influence and guide our success as a team?

TEAM NOTES

