



# Vision Mission Values Workshop

## Questionnaire & Guide

## Welcome!

This workshop is divided into two sections – Pre-workshop materials that should be completed in advance of the live sessions and exercises, by key team members, which will be conducted as a group or in teams.

The Agenda is as follows:

Time	Subject	Notes
<b>Vision Mission Values Workshop Schedule</b>		
9:00am – 10:00am	Introductions and Goals Review	Group norming and shared vision discussion. Current Mission, Vision and Values Review – review the endgame
10:00am – 11:30pm (with Break)	Pre-Materials Review and Discussion <ul style="list-style-type: none"> <li>• Brand Report Card</li> <li>• Brand Heritage</li> <li>• SWOT</li> <li>• Brand Equity</li> </ul>	Review charts and groups responses
11:30am – 12:00pm	Purpose Exercise	Forms the basis for our VMV work
12:00pm – 1:00pm	Lunch	Norming Discussions
1:00pm – 2:00pm	Defining our Vision	
2:00pm – 3:30pm	Building our Mission	
3:30pm – 3:45pm	Break	
3:45pm – 5:00pm	Sharing our Values	
5:00pm – 6:00pm	Discussion and Wrap-up	



## **PRE-WORKSHOP MATERIALS**

## Brand Equity Valuation

Your existing brand probably has some inherent value, even though you may not have managed its development. How you do what you do, and how well you do it, plus the company's people and the principal's reputation, have combined to create a perception of your firm in the minds of customers and the general public. **This perception is your brand equity, its built-in, existing value—what your brand is worth right now.**

How do you determine whether your brand has "equity" sufficient to build a brand for the future?

There are four common measurements for assessing brand equity.

**[Plot the results on a bar chart to see where brand equity is weakest and strongest.]**

**To express agreement/disagreement with the following statements, assign a value from 1 to 10, with 10 indicating full agreement with the statement, and 1 indicating full disagreement.**

- 1. Brand Reputation** – Reputation is a large part of any brand's equity. It is key to people's perceptions of our company, our products or services, and our people.

\_\_\_ We have a reputation for quality products/services.

\_\_\_ We are a leader in our industry.

\_\_\_ Our people are highly regarded by clients, vendors, recruits, the media and the general public.

\_\_\_ Our firm gives back to the local community.

\_\_\_ We are a vital part of the local business community.

\_\_\_ Our company is a good place to work.

\_\_\_ We do well in recruiting and employee retention.

- 2. Brand Awareness** – Beyond reputation, how "great" is awareness of our company, its products and services?

\_\_\_ Our Company is well known.

\_\_\_ We are well known across a broad territory.

\_\_\_ If our company name comes up in conversation, people know who we are and speak well of us.



We are best known for:

- Our people
- Our products
- Our service
- Innovation
- Industry leadership
- Community involvement
- Other \_\_\_\_\_

**3. Brand Momentum** – Is our brand growing, standing still, or in decline?

- We have a lot of competition.
- We have won large accounts recently.
- Our new business program is bringing in new accounts.
- Our publicity and media coverage is positive.
- We are expanding locations/product lines/services/workforce.

**4. Company Vision** – Where are we and where do we go from here?

- We have a clear picture as an organization of where our firm is going, what we want to achieve, and how we are going to achieve it.
- We collectively work hard every day to forward that vision.
- We have the tools and technology in place to help achieve company goals.

**Additional Comments:**



## Internal “SWOT” Analysis for Brand Discovery

**SWOT stands for Strengths, Weaknesses, Opportunities and Threats.**

Strengths and Weaknesses generally apply to internal factors of a company. Opportunities and Threats refer to external factors that can have an impact on business or be used to develop marketing and business objectives.

Please list those Strengths, Weaknesses, Opportunities and Threats that you feel are vital in considering this agency’s brand development and future business planning. The analysis does not need to be lengthy, but we ask that you think carefully and critically about each item. Your opinions are valuable; please be honest. Your contributions will ultimately be a part of our Brand Discovery Report.

**Strengths:**

**Weaknesses:**

**Opportunities:**

**Threats:**

**Comments:**



## Brand Report Card

### Instructions

Rate your brand on a scale of 1 to 10 for each characteristic (in bold face), 1 being extremely poor and 10 being extremely good.

**To generate discussion among all those individuals who participate in brand management, create a bar chart that reflects the scores awarded for each questions.** This visual representation of your brand evaluation helps you to identify brand strengths and weaknesses. It also clarifies how your particular brand is being supported. (Linx will bring this to the live workshop!)

Try to **think like an outsider** as you evaluate your own brand. View it through the eyes of a customer, vendor or the general public rather than through your insider knowledge of the company.

### Score

- \_\_\_ **The brand excels at delivering the benefits customers truly desire.** You attempt to uncover unmet customer needs and wants, using multiple survey methods. You focus relentlessly on maximizing your customer's product and service experiences. You have a system in place for delivering customer comments to those people who can effect change.
  
- \_\_\_ **The brand stays relevant.** You invest in product improvements that provide better value for your customers. You are in touch with your customers' tastes... with current market conditions... with new trends as they apply to your products/services. You make marketing decisions based on this knowledge.
  
- \_\_\_ **The brand's managers understand what the brand means to customers.** You know what customers like and don't like about your brand. You are aware of all the core associations people make with your brand, whether intentionally created by your company or not. You have created detailed, research-driven portraits of your target customers—your brand advocate profile. You have outlined customer-driven boundaries for brand extensions, and guidelines for brand marketing programs.
  
- \_\_\_ **The pricing strategy is based on customers' perceptions of value.** You optimize price, cost, and quality to meet or exceed customers' expectations. You have a system in place to monitor customers' perceptions of your brand's value. You regularly estimate how much value your customers believe the brand adds to your product.
  
- \_\_\_ **The brand is properly positioned.** You have established necessary and competitive points of parity with your brand competitors. You have established desirable and deliverable points of difference.



- \_\_\_ **The brand is consistent.** You are sure that your marketing programs are sending no conflicting messages, and that your brand message has been consistently clear and positive over time. You regularly review and adjust your programs to maintain consistency.
  
- \_\_\_ **The brand is given proper support and that support is sustained over the long run.** You make every effort to fully understand the successes or failures of marketing programs before they are changed. Research and Development provide sufficient brand support. You do not cut back marketing support for the brand in reaction to a downturn or slump in sales.
  
- \_\_\_ **The brand portfolio and hierarchy make sense.** The corporate brand creates a seamless umbrella for all the brands in your portfolio (Company/Products/Services). The brands in that portfolio hold individual niches. You know how extensively the brands overlap, and in which areas. You know how well the brands maximize market coverage. Your brand hierarchy is well thought-out and well understood.
  
- \_\_\_ **The company monitors sources of brand equity.** You have created a brand charter that defines the meaning and equity of the brand and how it should be treated. You conduct periodic brand audits to assess the health of your brand and to set strategic direction. You conduct routine tracking studies to evaluate current market performance. You regularly distribute brand equity reports that summarize all relevant research and information to assist marketers in making decisions. You assign explicit responsibility for monitoring and preserving brand equity.
  
- \_\_\_ **The brand makes use of and coordinates a full repertoire of marketing activities to build equity.** You have chosen or designed your brand name, logo, symbol, slogan, collateral, signage—your brand identity— to maximize brand awareness. You implement integrated push and pull marketing activities that target both distributors and customers. You are aware of all the marketing activities that involve your brand. The people managing each activity are aware of one another. You capitalize on the unique capabilities of each communication option while ensuring that the meaning of the brand is consistently represented.

## Brand Heritage Analysis Worksheet

Assign a value to each factor of your brand heritage, where 1 = “has little or no value,” and 10 = “has great value.”

- \_\_\_ Company factual history – the blow-by-blow facts of your founding, customer list, work, offices, community connections and people.
- \_\_\_ The founders – you and your partners, or those from whom you purchased the business. Where did you come from, who were your influences, how do you lead?
- \_\_\_ Longevity – How long have you been around? How has your business risen to its present level? What are your prospects for continued growth?
- \_\_\_ Your people – Who are your key managers, salespeople, etc.? What are their histories? How did their hiring contribute to your rise, and effect the perceptions of your company?
- \_\_\_ Your product/service – How highly regarded is your product? How effective is it in the task it was designed for? Do your products/services attract new clients, employees and media attention? Are you known for quality? Do you have good after-the-sale service? Do you offer ongoing customer support?
- \_\_\_ Research and Development – Do you invest in new product development? Are you innovators? Do you develop new products and services that are a good fit for your customers? Do you anticipate customer needs? Do you listen and respond when they ask for something?
- \_\_\_ Community relations – How active are you/your firm in community support? Do you take part in local charitable activities? Do your people serve the community? Are you an influence in local organizations?
- \_\_\_ Competition – With whom have you competed over the years? Who have you outlasted? With whom did you merge? Do you compare favorably with other reputable businesses in your industry and market?
- \_\_\_ Media Relations – How positively are you perceived by and presented in the local media? Do you have positive relations with media contacts? Are you regarded as a “quotable” expert in the business community? Can you leverage media relations to help the company?
- \_\_\_ Vendor relations – How well do you manage relationships with vendors? Do you treat them respectfully? Do they treat you respectfully? Do they refer clients to you who are looking for your products and services? Do you refer clients to them?



- \_\_\_ Your office/location – Where do you work? What is the style of your office/workspace? Is your space a prestige space? Does the space add to perceptions of your brand’s value.
- \_\_\_ Company financial standing – Are you in good standing with all vendors and financial institutions? Do you have a good credit rating? Will vendors and suppliers give you good references? What is the company’s debt? What is the company’s profit margin? Is cash flow good? If publicly traded, how is the company indexed? How do investors regard it?
- \_\_\_ Company Marketing – Do you have an annual marketing budget? Do you consider the marketing budget an investment in ongoing success? Is your marketing attention generating and memorable? Is it correctly targeted to your audiences? Does your marketing generate measurable results?

Plot the results of this survey by creating a bar chart, one bar for each item. This will help clarify which areas of your Brand Heritage best support the Brand and can be emphasized, and which areas should be downplayed until they can be improved.



# WORKSHOP MATERIALS

## Purpose Exercise

**Instructions:**

- Take 5 minutes to fill out individually
- Identify key words from your answer to each question
- Discuss as a quartet; Find common key words
- Brainstorm potential group names using key words

QUESTIONS	KEY IDEAS
<b>What is our core “business”?</b>	
<b>What purpose do we serve?</b>	
<b>How are our core methods and processes?</b>	
<b>Is our process replicable and scalable? How much energy (resources) does it take?</b>	
<b>What impact do we want to have?</b>	
<b>How will we know that we are successful?</b>	
<b>How do we want to be known (legacy)?</b>	



## Vision Worksheet

**Process:** The team goes through the three R's: Reflect, Record, Respond. (*or think, write, talk*)

- A) If possible, break into teams
- B) Make a list
- C) Write or post wall
- D) If broken into teams, reconvene and read posted lists to yourselves
- E) Look for common themes and buzz words
- F) Where do you want to begin
- G) Develop vision fragments and combine
- H) Reach consensus (*voting method?*)

**Tips:** Talk about your personal vision. This normally bridges into company vision. Consider probing questions such as: Why are we here? Why do we go to work? Why do we wake up each day?

The conversation should move past typical answers such as: "I have to eat", "I have to have a roof over my head". These are life elements that one can gain by working anywhere, not in the chosen field or profession. What is your passion? And after that, why do you think you are doing this together? Normally groups of people in business are together to create wealth, but the commerce side does not really enter the equation as much as the heart. Vision speaks to the heart and soul of the organization. The vision statement at the end should be inspiring... speak to the heart and soul of the organization... and reflect a 30,000 foot view.

---

---

---

---

---



## DEVELOPING A MISSION STATEMENT

*MISSION STATEMENT: A Succinct Statement That Articulates the Organization's Purpose, Business, Values, and Beliefs.*

**A good mission statement answers the following questions:**

- Why do we exist?
- What is the problem or need our organization is trying to address?
- What makes our organization unique?
- Who are the beneficiaries of our work? Who do we want to serve?
- How will we satisfy our constituencies?

### 1. STRUCTURE

**PURPOSE: What do we hope to accomplish?**

- Include an infinitive that indicates a change in status  
To Increase... To Decrease... To Prevent... To Improve...  
To Eliminate
- An identification of the problem or condition to be changed  
Focus is on **outcomes** and not methods. What is going to change?

**BUSINESS: What activities will we undertake to fulfill our purpose?**

- Usually includes a the phrase "To Provide" or links to purpose statement with the words "by" or "through."

**VALUES: What are the basic beliefs that we share?**

- What tenets will guide us as a group?

### 2. CHOOSING THE WORDS

- Should be FEASIBLE (*Not "the impossible dream"*)
- Should be MOTIVATING
- Emphasize how we are DISTINCTIVE
- Clearly and easily UNDERSTOOD

### 3. SAMPLES

- The American Red Cross, a humanitarian organization led by volunteers, guided by its Congressional Charter and the Fundamental Principles of the International Red Cross Movement [**values**], will provide relief to victims of disasters [**business**] and help people prevent, prepare for, and respond to emergencies [**purpose**].
- The American Cancer Society is the nationwide community-based voluntary [**values**] health organization dedicated to eliminating cancer as a major health problem [**purpose**] by preventing cancer, saving lives, and diminishing suffering from cancer, through research, education, advocacy, and service [**business**].
- The Document Company, Xerox provides solutions to help you manage documents - paper, electronic, online [**business**]. Whether you run a small business, a global enterprise, or a home office, [**values**] we offer high-value hardware, software, services, and solutions to help you do more, faster, more easily [**purpose**].

### 4. GROUP EXERCISE

#### Step #1: (15 minutes)

- Write down what you think the mission statement should be for the group. Remember to include “purpose,” “business” and “values.”

#### Step #2: (25 minutes)

- As a group, review statements and discuss common words, themes, and key concepts. Develop a consensus and rewrite one mission statement for the small group.

#### Step #3: (20 minutes)

- Identify common words, themes, and key concepts found in statements.
- Discussion/Consensus-building
- What must be included in the final statement? What should not be included?



**Step #4:**

- Linx will draft a mission statement that will reflect the consensus of the team. Set a deadline for completion.

**Step #5:** *(Plan to review at next meeting)*

- Review draft mission statement *(revise as necessary)*.
- Submit draft mission statement for necessary approvals.
- Finalize Mission Statement.



## Mission Worksheet

**Process:** The team goes through the three R's: Reflect, Record, Respond. (*or think, write, talk*)

- A) If possible, break into teams
- B) Make a list
- C) Write or post wall
- D) If broken into teams, reconvene and read posted lists to yourselves
- E) Look for common themes and buzz words
- F) Where do you want to begin
- G) Develop mission fragments and combine
- H) Reach consensus (*voting method?*)

**Tips:** The mission statement must conform to the following three elements that reflect a common purpose:

- 1) What are you going to do?
- 2) For whom?
- 3) In what fundamental ways?

Make sure in the end it is what you want to say in the most concise way.

---

---

---

---

---

---

---

---



## Values Worksheet

**Process:** The team goes through the three R's: Reflect, Record, Respond. (*or think, write, talk*)

- A) If possible, break into teams
- B) Make a list
- C) Write or post wall
- D) If broken into teams, reconvene and read posted lists to yourselves
- E) Look for common themes and buzz words
- F) Where do you want to begin
- G) Develop value fragments and merge/purge
- H) Reach consensus (*voting method?*)

**Tips:** Talk about your personal formulas for success... the things you consider as essential to winning.

This normally bridges into company Rules of Engagement. Consider probing questions such as:

- Why are we successful?
- How have we been successful?
- What is our success formula?
- What are the values embedded in the formula that have been a part of our past and

future success?

Stay away from "Motherhood, Apple Pie and American Values", this is more around success. In the end, these values as part of the Rules of Engagement should be powerful enough that people should be willing to enforce and reinforce them.

---

---

---

---

---

---

---

---