

THE MISUNDERSTOOD PROCESS OF SELECTING YOUR **CORE** VALUES

A **SAND**PAPER

A LITTLE ROUGH, BUT HANDY TO HAVE

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What is a **SAND**PAPER?

A white paper without the marketing fluff. Too often, organisations like ours push out white papers with the intention of driving product or services sales, earning them (the white papers that is) a mixed reputation for usefulness and authenticity.

SANDPAPERS don't do that. For one, they're purposefully rough. We don't aim to be too polished, but rather to get straight to the point and in particular to sand down the unhelpful outer edges of some of the conformist thinking that prevents you from getting results in whatever idea is being tackled.

Each **SAND**PAPER will focus on one big idea where Happy Sandpit customer engagements have convinced us there is a serious challenge and share some bold ideas to help solve them.

We sincerely hope this provides some much-needed value to you.

Intro

There comes a time in the lifecycle of any organisation, when you're going to want to define and publish a set of Core Values for all employees to embrace, and thereafter on occasion to reconsider them, put them back under the magnifying glass and decide whether they are still 100% right for you. When you do that, the odds are greater than you can imagine that you will take a wrong turn or two and struggle to pull it all together.

This is hard work. It's challenging and laborious, but by observing the five rules for Core Values laid out in this **SAND**PAPER, you'll find your path to success much straighter and more likely to give you results that will deliver the long-term benefits you seek.

The five rules have been gleaned through years of research and active discovery for a wide range of organisations across industries, and reflect what we believe at Happy Sandpit to be the sine qua non of a strong, authentic, effective set of Core Values.

Rule #1: Core Values are not merely sets of 'preferences'

It is altogether too common for even the smartest organisations to mistake **general preferences** for **Core Values**, leading them to

attempt to embed ideas and concepts to underpin the organisation that even the leaders cannot fully engage with.

Those organisations may believe they have firm Values in place, but often have an underlying 'way of being' that contradicts the Values and therefore makes them optional – preferences for want of a better word – right from

body ever gets called frivolous today for putting the words 'Integrity', 'Respect', and 'Accountability' on their walls.

Alternatively, we may get into this position because we lack the will, the desire or the time in a jam-packed schedule, to do real introspection and see what words, ideas and philosophies present themselves.

Core Values come about through **discovery**, not **development**. You can't make them up; they must be present already, and the job is to **discover** and **define** them.

the very start. For example, you may insist that 'Integrity' is a Core Value, but only measure on performance, resulting in a conflicted message along the lines of: "we would prefer it if you 'did the right thing', but your bonus is dependent on you creating a high sales volume."

The reasons organisations get into this position are many and varied, but partly there is a sense that in order to be taken seriously, you must first be 'serious', meaning there is safety in walking down a well-trodden path.

Just as "nobody gets fired for buying IBM" was a once unassailable piece of logic, no-

But it must also be said that **sets of preferences** are the products of flawed questions and shallow, formulaic processes which have permeated the business landscape for years, and continue to lead even great organisations and highly capable leadership teams astray.

The reality is that your Core Values are evident in the daily run-of-play at your organisation, in the interactions, the choices, and the experiences of the people who work there, and to a greater or lesser extent, in the way your customers perceive you. To uncover them, present questions to the whole organ-

THE NORM

- Your organisation has general preferences
- They were chosen because they are the right sorts of words to have.
- They represent a comfortingly palatable set of words, but which are extremely difficult to define and explain.
- They are communicated with formal authority, using the language of policy and process.
- You're more likely to hear the words: "Uh, I guess I could give you three or four of them."
- They offer a clear insight into how unconnected the organisation really is with its people, and that it is comfortable ticking boxes.
- Their effectiveness is hard, if not impossible to measure.

THE IDEAL

- Your organisation has **Core** Values
- They were chosen through introspection and discovery.
- They represent a rich definition of who you are that you can easily explain, promote and if need be, defend.
- They are communicated in language that the internal audience connects with.
- There is clarity about what they are and what they mean.
- They represent clear evidence that the organisation is connected, listening and learning and that it dares to be explicit.
- Their effectiveness is easy to measure

isation along the lines of the following:

(1) When things are going great around here and people are getting along brilliantly and working together well and we are hitting our targets and achieving great results, what are the behaviours, actions and activities that we see clearly evident in the organisation?

(2) When things are going poorly; when there is friction and fighting, we are struggling to

achieve our objectives and we are awash in complaints, both internal and external, what behaviours, actions and activities do we clearly see in the organisation? Or perhaps, what are those from the list generated by question (1) that are missing?

If you get enough feedback, questions such as these will enable you to discover what the organisation already knows about itself but may take for granted, and also the things the

organisation may not realise about itself because it hasn't previously taken a long, hard look at itself.

Done correctly (with simplicity, energy and authenticity), this will help you to develop your thinking as you try to identify what it is that is truly **Core** to the performance and success of the organisation.

ity to describe your organisation specifically. This too-generic approach is tempting because it's easier, but it's counter-intuitive to the the very purpose of actually discovering Core Values, and therefore, utterly pointless. Organisations that veer off the path at this stage tend to do so because they view Core Values as things you develop, not things you

The biggest weakness of ***poorly selected Core Values*** is that they ***lack a back story*** and as a result, are immensely difficult to bring to life.

Rule #2: Authentic Core Values require deep introspection

Discovering what is truly CORE to your organisational success; the things that your organisation really lives and dies by, requires some deep introspection, because those things are not always immediately apparent.

There are high-level ideas that apply to many if not most organisations, such as the need to be efficient, perhaps to innovate more, and to care for customers; but in many instances, these are just permission-to-play ideas, not Core Values. They're mindsets that apply broadly and as such have little capabil-

discover; as things you can manufacture rather than things you must mine. Core Values are much more akin to ore extracted from the ground at great effort rather than the finished products created from that ore.

The decision not to think deeply enough and get to grips with the things you live and die by, means right from the outset you fail to hit any of your nails precisely on the head.

Using the feedback from the organisation gathered in the execution of Rule #1, the group that has been charged with ultimate selection - most likley members of the senior leadership team - will spend time examining

the importance of each insight, in terms of its ability to deliver a live-or-die-by business impact; not an improvement or a nice to have, or a preference, but something without which the whole game could conceivably end badly.

Do not restrict yourself to rating the ideas delivered through the feedback however; take time to thoroughly examine all the varied information you have at your disposal, including your own individual and collective experiences. Combined, these enable you to add real depth to your evaluation and to build up a solid backstory for each concept that makes the final list of your Core Values.

Rule #3: For a Core Value to be real, it must have a back story

You must be able to clearly tell people what your Core Values mean and why they are there, and this is best achieved when there is a clear and relevant 'back story' for them.

Think of your 'back story' in terms of that which underpins any great novel. While the hero of that story may be an adult already as the story begins, they undoubtedly have a back story of things that happened, experiences they have had, people they have met and so on, which make them who they are. By revealing the backstory throughout the story,

the author enables the hero to achieve depth and connectedness and a sense of being authentic and real.

The same for your Core Values, though you should make the backstory for these clear up front. A Core Value can never exist in isolation. There must be a clear reason it was chosen and that reason will usually go along the lines of: "We discovered that when we did 'x', we would struggle, but when we did 'y' we found business easy and our relationships had less friction and we all had a better time at work and did better work with more productivity and better results, and we knew at that point it would have to be 'y' from now on. That's why it is a Core Value and that's why we need you to live it, daily."

The biggest weakness of poorly selected Core Values is that they lack this and as a result they are immensely difficult to bring to life for new and existing employees alike because they are unrelatable and have no obvious vitality of their own. Let's look at these as two separate challenges:

(1) New employees: when people join your organisation, you must make an effort to discover whether they are adaptable to new ideas, which may be revealed through ques-

tioning about times they have been faced with something new (at work, while travelling, on holiday or in the face of a challenge, for example), and have had to adapt to a new situation.

The reason for this is that while it may be exceptionally difficult and perhaps even impossible to determine whether someone lives

need the back story in other words, which provides the clarity that will enable them to adopt and hopefully to embrace your Core Values when they are present in the workplace.

There is a mental device here, which may be helpful. Perhaps you have visited foreign lands and perhaps you didn't always share some of

If other organisations have ***similar*** or even ***identical*** Core Values to yours, let that be nothing more interesting than ***a random coincidence***.

the same Core Values as your organisation (and honestly, you may not even want that, despite the conventional wisdom that says you should), it may be much easier to assess whether they are likely to be able to adapt to your Core Values and live them when they are on company property, on company time, or acting in the interests of the company.

Your back stories create the link. When someone is generally adaptable, all that may be required to get them to adapt specifically to your Core Values is that they have an understanding about why they were selected, what they mean, and why they are necessary. They

the Core Values that underpinned the culture of those lands, but how did you get along while you were there? Did you have fun with the locals, enjoy the differences, and generally adapt to a different way of doing things? There are two things at work if you did. The first is that you are adaptable to new ideas and new ways of doing things. Assuming there wasn't anything especially appalling to you about the local culture, you may not have even had to try too hard, to adopt a new pattern of being for a few days. That is precisely the sort of adaptability you should seek in new employees. The second thing worth noting is that the only

thing that compelled you to make the switch is that you passed through passport control; that there was a physical device - much like the front door to a building - that served as a filter. What filter could you create at your front door and in your other entranceways, to get the message out?

(2) Existing employees: when presented with Core Values, people will inevitably have questions about how they came to be – and all the more so when the Core Values that have been selected are specific.

On the subject of Core Values, people may be more jaded than on any other topic, and especially in the corporate world, where they have often been presented with a new set of Core Values at least once and perhaps more than once in their careers.

To maximise your chances of adoption, your back stories are critical because they reveal the rigour of your process and the clarity of your thinking. These are not vague concepts, but ones that have been discovered through introspection and hours of deliberation. That perception - borne of reality of course - can be immensely galvanising for employees who would otherwise be asked to simply accept a new set of Core Values, however unrelatable

they find them to be. A compelling back story is a powerful way of enabling your Core Values to sell themselves to even the most skeptical employees, because of their unquestionable authenticity. That's something that is far too often missing..

Rule #4: Core Values should be very specific to your organisation

The word 'specific' doesn't mean that they must be granular or narrowly-focused, but that they must be about **you as an organisation** very specifically. If other organisations have similar or even identical Core Values to yours, let that be nothing more interesting than a random coincidence.

By following Rules #1 - #3, you avoid falling into the trap where your chosen set of Core Values is toothless, spiritless, and powerless to inspire action. But that isn't enough if your Core Values aren't fundamentally about you. Unless they are, how can your messaging have conviction and relevance and how can you get any positive energy behind it?

If on the other hand, they are specific to you; clearly and undeniably relevant to your needs as an organisation; they will have a broad range of powers including the abilities to achieve the following:

- (1) Help you bring and adjust new people to the organisation quickly
- (2) Give your managers and leaders a strong framework for tough conversations
- (3) Give all your people across the organisation a framework for accountability
- (4) Give all your people across the organisation a framework for day-to-day decision making

also provide a compelling back story to make the case for it. On top of that, it will be easy to sell the idea to employees, old and new, because it is very specifically relevant.

In the second, it's much more notional. You can make the case for efficiency, but you can't as easily make the case for urgency around being efficient. The result is that buy-in is much harder to achieve.

If you don't acknowledge the ***internal language*** used in something as ***deeply native as your own Core Values***, you run the risk of stealing from them their ***relevance***.

Look at it like this. All businesses should be run efficiently, but for those with narrow and tightening margins, efficiency is life or death. For those, it is a Core Value. For others, it may just be a preference. Of course we would prefer for employees to conduct themselves and use company resources efficiently, but in the grand scheme of things, it doesn't really matter too much if they only do so sporadically.

In the first instance of the company with the tightening margins, introspection would easily uncover the need for efficiency and it would

Rule #5: Core Values are only aimed at your internal audience

Before you even think about how to communicate your Core Values, once they have been selected, you must give real and deep thought to your audience. Remember this: your Core Values are designed to instruct your employees, leaders and all members of the team about what is critical around here.

There is little point therefore, wondering how they will play to a broader audience, such as to people outside the organisation.

This may sound like an obvious thing to say, but consider how focused organisations do this.

- Australian enterprise software company Atlassian has as one of its Core Values: **Don't #@!% the customer** (written precisely like that, on the company's website).
- At South African presentation strategy firm Missing Link, a Core Value is: **Give a Shit**
- At South African software developer En-telect, a Core Value is: **Things done, you must get** (it makes sense when spoken like Yoda from Star Wars ...)

Each of these is written for an internal audience. They speak directly to the people they are designed to instruct, in language that they embrace.

They may not play out well for an external audience and they absolutely lack the 'serious' tag, but that was never the point. It is likely that customers and suppliers and other external parties close to each organisation may find those Core Values interesting in both good and bad ways, but that is an uncontrolled side-effect.

If you do not acknowledge the internal language used in something as deeply native as your own Core Values, you diminish their pow-

er, and run the risk of stealing from them their relevance.

Conclusion

Core Values, correctly chosen, are the most powerful organisational tool imaginable. We urge all organisations to take this very seriously and set aside time and allocate the effort to this admittedly cumbersome and sometimes uncomfortable, but utterly rejuvenating and defining process.

Contact

This **SAND**PAPER is prepared and published by Happy Sandpit, out of sunny Johannesburg, South Africa. You can contact Happy Sandpit by email on info@happysandpit.com or visit our website at: www.happysandpit.com to find out more about us and what we do.