

Exercise #1 – Crafting a Vision Statement

This is your Aspirational Statement of the Future.

Complete the Following to Determine Your Language:

Who will do it? _____

What will they do? _____

Why will they do it? _____

How will it be done? _____

Samples for Inspiration:

One day, 30 percent of all retail transactions in the US will be online. People will buy from the company with the best service and the best selection. We will be that online store. Our hope is that our focus on service will allow us to wow our customers, our employees, our vendors, and our investors.

-Zappos

To be the best quick service restaurant experience. Being the best means providing outstanding quality, service, cleanliness, and value, so that we make every customer in every restaurant smile.”

– McDonald’s

Your Vision Statement

Exercise #2 – Defining Your Core Values

Choose 3-4 Core Values from the List Below, or Create Your Own!

Sample Core Values:

<i>Integrity</i>	<i>Honesty</i>	<i>Accountability</i>
<i>Passion</i>	<i>Diversity</i>	<i>Quality</i>
<i>Client-centered</i>	<i>Respect</i>	<i>Stewardship</i>
<i>Genuine</i>	<i>Exceptional</i>	<i>Innovative</i>
<i>Teamwork</i>	<i>Empathy</i>	<i>Sustainable</i>
<i>Bold</i>	<i>Openness</i>	<i>Impactful</i>
<i>Entrepreneurial</i>	<i>Continuously Improving</i>	<i>Straightforward</i>
<i>Accessibility</i>	<i>Humility</i>	<i>Simplicity</i>
<i>Evolving</i>	<i>Transparency</i>	<i>Courage</i>
<i>Hardworking</i>		

For Each Core Value, write one sentence explaining what it means to your organization.

Core Value #1: _____

Explanatory Sentence: _____

Core Value #2: _____

Explanatory Sentence: _____

Core Value #3: _____

Explanatory Sentence: _____

Core Value #4: _____

Explanatory Sentence: _____

Exercise #3 - Internal Environment

Determine the Key Internal Issues, Challenge and Opportunities that You Face!
Some key areas that are often considered are:

Staffing:

- *Do you have any key vacancies now or upcoming (retirements)?*
- *Do you have personnel who are skilled in what you need them to do?*
- *Do you currently have or do you anticipate any future issues with your leadership team?*

Facilities or IT

- *Are your current facilities adequate for your needs or are your needs not being met?*
- *Do you anticipate any additional/different facility needs in the future?*
- *Do you have the resources you need to complete your work?*
- *Do you anticipate any major capital needs in the near future?*

Services

- *Are you satisfied with the current services that you provide and the level at which you provide them?*
- *Are there any future services that you anticipate providing that are not currently being provided?*

Processes and Procedures

- *Are there innovations that could improve either your service output or your staff/customer experience?*
- *Are you satisfied that current policies and procedures are adequate and that staff follow them?*

Key Area #1 - _____

Issue #1: _____

Issue #2: _____

Issue #3: _____

Key Area #2 - _____

Issue #1: _____

Issue #2: _____

Issue #3: _____

Exercise #4 – External Environment

Determine the external factors that may affect your ability to achieve your goals in the future! Some of the key areas to consider are:

Political

- *Are there national or international issues that may affect your work?*
- *Are there state-level issues that may affect your work?*
- *Are there local or county-level issues that may affect your work?*

Economic

- *Are there macroeconomic issues (stock market returns, national recession, etc...) that may affect your work?*
- *Are there micro-economic issues (local challenges and markets) that may affect your work?*

Demographic

- *Are there any demographic issues in your county that may affect your work?*

Socio-Cultural

- *Are there any issues surrounding your work that may be affected by different cultural trends or changes in societal values?*

Key Area #1 - _____

Issue #1: _____

Issue #2: _____

Issue #3: _____

Key Area #2 - _____

Issue #1: _____

Issue #2: _____

Issue #3: _____

Exercise #5 – Action Plan

As a final step, you will determine some actions that you can take to address these issues. For today, choose two key issues that you want to address and answer the prompts.

Key Issue #1: _____

Define what you will do: _____

Who will do it? _____

How will you know that you are successful? _____

Key Issue #2: _____

Define what you will do: _____

Who will do it? _____

How will you know that you are successful? _____
