

Core Values Workbook



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WELCOME TO YOUR CORE VALUES WORKBOOK!

Thank you for downloading this workbook to help you develop core values for your business. Or it may be to reevaluate them to see if your current core values are really working for your company.

In 2018 we went through this exercise with my company, Beyond the Classroom, to establish a set of core values. We use our core values every single day to communicate with families and engage in strategic planning. They are truly the backbone of what the company is at its essence.

In this workbook you will go through a couple of brief exercises to start to consider what is at the heart of your company.

Let's get started,
Cathy

LET'S GET STARTED

Core Values

Step 1

Why are core values important?

Core values are the guiding principles that shape the decisions, culture, and impact of your business. They are the "why" behind your "what"—and they help attract aligned clients, team members, and opportunities.

You can create EASE in your business by using your Core Values as a compass. No more second-guessing decisions. When you have your values established, opportunities will align, or they won't—decision making becomes easier.

Step 1: Browse Common Core Values

Circle or highlight the values that resonate with you (you can always add your own).

Integrity Authenticity Creativity Excellence
Empowerment Compassion Collaboration Freedom
Flexibility Fun Innovation Respect Simplicity
Trust Balance Inclusivity Impact Growth Generosity
Curiosity Connection Transparency Service Courage
Sustainability Accountability Leadership Joy Reliability
Presence Purpose

Core Values

Step 2

Reflect with these questions

Use these prompts to help uncover your truest business values:

What matters most to you when you work with clients?

(Think about the kind of experience you want to create for them.)

What non-negotiables do you hold in your business (even when it's hard)?

(What are you never willing to compromise on?)

When have you felt most proud of how you ran your business? What values were at play?

What do you want your clients or community to say about you when you're not in the room?

(How do you want to be known?)

Jot down your answers to these questions here

CORE VALUES

Step 2

Continued

Continue to reflect on the questions (what you didn't get to on the previous page)

What matters most to you when you work with clients?

(Think about the kind of experience you want to create for them.)

What non-negotiables do you hold in your business (even when it's hard)?

(What are you never willing to compromise on?)

When have you felt most proud of how you ran your business? What values were at play?

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(How do you want to be known?)

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CORE VALUES

Step 2

Narrowing them down

Now it's time to look at the values that resonate with you along with the answers to the questions and choose the 3 values that you feel are at the core of your business. These are things that your company "lives and dies by". This can take work, so stick with it. Try on the values over a period of time and evaluate if they are they TRULY the three that define your business.

Jot down your answers to these questions here

CORE VALUES

Step 3

Putting it Together

Revisit these values often and use them to guide:

- Your branding and messaging
- Client relationships
- Business decisions and boundaries
- Team hiring or collaborations

How will I use my core values day to day?
Write a list below.

CORE VALUES



[illegible]

ABOUT CATHY

It all started when I was 4 years old, selling dandelions door to door and over time I have realized that I have a strong entrepreneurial spirit.

That, combined with being a lifelong learner and a curious person, I have founded and co-founded six successful organizations. I have also had a 15-year career in mental health and addictions along with knowledge translation.

I have spent 3 decades as a business owner and entrepreneur. I have a lot of lived experience with different types of business ownership; sole proprietorship, partnerships, corporations, licences and franchises. What keeps me going are three things: my curiosity, creativity and willingness to take risks.

I am available for personalized business coaching and advisement to help you take your business to the next level. I can offer a different perspective to help you clarify next steps and continue the great work you are already doing.

Feel free to connect with me to share your core values! I can also help you to refine them so that they are meaningful and useful to driving your organization forward.

You can also pick up my book *The Dandelion: Secrets to Growing Your Successful Business from the Ground Up*

Connect with Cathy

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