

# MAP & FIRE



Lean Strategy Worksheet #1:

**Purpose**

## Purpose Worksheet Overview

Welcome to step 1 of 7 in the Lean Strategy Process!

Purpose is an interesting step in that it can be both the easiest and hardest step to tackle.

It's the easiest in the sense that it largely comes from you. What do you want this company to be? Where do you see it going? What are your values? These are questions that only you can answer.

In other ways it's the hardest, because some of these questions are pretty big and they can tap into a personal connection between who you are as a person and what your business represents. The good news is that going through the Lean Strategy process will help you work through that challenge in a structured way.

Purpose is the first step in the process because in many ways it shapes what your business can and should be. It frames all of your other activities and *gives you a way to decide* how to spend your resources. Which customers should you serve? How should you go about doing so? Which opportunities will bring you closer to your big picture goals, and which are diversions?

Many business owners struggle to answer questions like these -- sometimes for years. By taking some time to think about your company's Purpose up front, you'll be well-equipped for the journey ahead.

## Purpose Worksheet Outcomes

Here are some of the key points we'll cover in the Purpose worksheet:

- **Why** your company exists, in a fundamental sense
- **How** you and your team will conduct yourselves as you execute your plans
- **What** the world will look like if you accomplish everything you set out to do
- **Which** big milestones you'll hit along the way

## Need Help?

For additional information on the components of this worksheet visit our website:

<http://mapandfire.com/field-guide/purpose>

## Core Purpose

Core Purpose is the big picture reason why your company exists. It acts as a guiding star to focus all other business activities. Focus exclusively on the big picture “why” of the company, and not include any methods, means, or specific approaches or executions.

## Questions

**On a very high level, what are you hoping to accomplish through your business? What does an ideal future look like in six months, a year, and several years down the road?**

**What is your company’s founding story? How has the business changed since then?**

**Separate from any financial aspirations, what was the driving force for creating your company? Was it connected to a passion, area of expertise, particular technological / product breakthrough, or simply an emotional drive to create a new path?**

## Exercise: Core Purpose Statement

**Distill the essence of what you wrote above into a single sentence (try it a few times):**


**Further distill that idea into a 5 word (or less) sentence (try this a few times, too):**


## Core Values

Core values describe what we believe and how we behave. They are our principles and standards of conduct even (and especially) when things get difficult. Values give meaning to your business beyond financial goals, and are independent of specific business activities.

### Questions

Here are some questions to help guide your thinking on Core Values (you don't have to answer them directly, but you can if you want!):

**What behaviors are important and non-negotiable regardless of what you're doing?**

**How will you conduct yourself as you work to bring your vision to life?**

**How would you describe you and your team when you're performing at your best?**

## Exercise: Core Values

Choose ***between 1-3 Core Values*** in each of the core values tables below. You can also write your own into the blank spaces. You should aim for 5-8 core values in total.

**Important Note:** When we say Core Values we mean “core” in a very fundamental sense. These are the values that are essential to the identity of your business, not just things that are important in general. For example, “Equality” is definitely an essential core value for a Human Rights Campaign, but maybe it’s not as essential to the identity of a local burger joint.

Like everything in the Purpose step, choosing Core Values is about making tough choices among many appealing options.

Values: Fundamental Values and Basic Needs. (choose 1-3)			
Safety	Trust	Health	Competence
Compassion	Optimism	Curiosity	

Values: Esteem and Meaning (choose 1-3)			
Honesty	Justice	Equality	Efficiency
Connectivity	Generosity	Freedom	Tradition
Progress	Love	Fun	Agility
Respect	Vision	Courage	

Values: Self-Actualization & Higher Expression (choose 1-3)			
Imagination	Creativity	Integrity	Stewardship
Prosperity	Selflessness	Expression	Truth
Empowerment			

# Tailoring Values for Your Business

There are only so many values-related words, so many Values lists look similar. To make your core values more meaningful, clarify what each one means to you below:

Core Value Keyword	Clarify what it means to your business

## Vision Statement

Your Vision Statement describes the ultimate outcome of your efforts in terms of your impact on the world. It can be helpful to think of your Vision in terms of an “Envisioned Future” -- that is, a description of what the world *could be like* if you achieve everything you set out to do.

### Questions

**What big impact do you seek to achieve, on people’s lives and possibly the world as a whole?**

**If you executed perfectly on everything you dream of doing, how would people’s lives be different? How would the world possibly be changed?**

### Exercise: Vision Statement

**Fill in each option to play with different approaches for wording what you aim to do:**

No \_\_\_\_\_ suffer from \_\_\_\_\_  
(broad customer segment) (problem(s) you solve)

All \_\_\_\_\_ are able to \_\_\_\_\_  
(broad customer segment) (goal(s) to enable)

\_\_\_\_\_ are provided with \_\_\_\_\_ so that they can \_\_\_\_\_  
(broad customer segment) (necessary resource(s)) (goal(s) to enable)

# Making the Vision Concrete: Defining Big Goals & Objectives

Goals are broad primary outcomes that move you closer to your Envisioned Future. Goals are often big-picture and may be qualitative or quantitative. These are best set at the organization level. Goals may be separated into short-term and long-term goals, and then further broken down into specific Objectives and Key Results.

## Questions

Take a few minutes to free-write about some of your big-picture goals for the business. Think big, and list as many as you can.

Dig deeper: What *exactly* do you want to achieve? What does the business look like? What does your own life look like? What about the lives of the people you serve?

## Exercise: Big Goals

Prioritize the 3 biggest goals from your list (you can merge two smaller goals if they contribute to a similar path):

BIG GOAL #1	BIG GOAL #2	BIG GOAL #3



### Exercise: Aligning Goals and Vision

Use your Vision Statement and your top 3 Goals from above to fill in the chart below.

VISION STATEMENT			
BIG GOAL #	BIG GOAL #1	BIG GOAL #2	BIG GOAL #3
BIG GOAL DESCRIPTION			
Supports the Vision? (Yes or No)			
How does it support the Vision?			

**Check Your Work:**

Do the Goals all logically support the Vision you defined?

Are the Goals all large enough that you won't likely achieve each in the next 6-12 Months?

Are the Goals distinct, each representing an important but separate path to your Vision?

## Exercise: Breaking Goals into Objectives

Under each Goal, fill in the Objectives required to achieve that Goal. Objectives can be thought of smaller goals that are more specific and concrete than the bigger goals.

Work on making your Objectives SMART (Specific, Measurable, Achievable, Relevant, Time-bound).

Go back and look at your original list of Goals to see if some of them may serve as Objectives under one of the Big Goals.

BIG GOAL #1	BIG GOAL #2	BIG GOAL #3
<b>GOAL #1 OBJECTIVES:</b>	<b>GOAL #2 OBJECTIVES:</b>	<b>GOAL #3 OBJECTIVES:</b>

## Congratulations, You've Completed the Purpose Worksheet!

Congratulations on completing Step 1 of the Lean Strategy Process!

After going through those steps you should have a solid view of where you're heading and what you're looking to accomplish along the way. Those fundamental building blocks will serve you and your team well and keep you grounded through good times and bad...sickness and health...you know, they are a bit like marriage vows in that way.

Now it's time to think about the audience you're seeking to connect with on this journey.

Which leads us to...

### What Next?

Next up is Customers. In this step, we'll look at your Customers through a slightly different lens than you may have done in the past. We're going to dig into what your Customers are seeking to accomplish in their life that you can help with, and what they value in a solution you could provide.

We want to understand your Customers in a fundamental way, so that you can create the strongest possible connections with them.

### A Sneak Peek at the Customer Step

Here's a sneak preview of what we'll cover in the Customer Step:

- Who your Target Customer is
- What needs (aka. "jobs") they're aiming to satisfy
- What functional, emotional, and aspirational elements they value in a solution for that job

### Don't Wait - Get Started Now on Customers!