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### Core Ideology Criteria

KEEP IN MIND: this is *not* a wordsmithing exercise. This is an exercise to capture the authentic core values and purpose of your organization, not to create a “pretty statement.” Certainly, some words inspire more than others, but the point is to discover the core values and purpose you are truly committed to. Just as the Declaration of Independence, the Gettysburg Address, and the I Have a Dream speech all express the same ideals in different words, your task is to identify ideals that can be expressed a multitude of ways.

### Core Values Breakout Session

*Estimated Time: 45 minutes*

1. Each person read to the group his or her list of core values. Based on these readings, determine the three to five values shared as most core to your breakout group.
2. Each individual take five to ten minutes of solo time to test **EACH** of the three to five values against the following test questions.

#### Core Value Candidate (list value):

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YES	NO	If you were to start a new organization, would you build it around this core value <i>regardless</i> of the industry?
YES	NO	Would you want your organization to continue to stand for this core value 100 years into the future, no matter what changes occur in the outside world?
YES	NO	Would you want your organization to hold this core value, even if at some point in time it became a competitive <i>disadvantage</i> —even if in some instances the environment penalized the organization for living this core value?
YES	NO	Do you believe that those who do not share this core value—those who breach it consistently—simply do not belong in your organization?
YES	NO	Would you personally continue to hold this core value even if you were not rewarded for holding it?
YES	NO	Would you change jobs before giving up this core value?
YES	NO	If you awoke tomorrow with more than enough money to retire comfortably for the rest of your life, would you continue to apply this core value to your productive activities?

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3. Each member of the group list for the group the core values to which they answered “Yes” to *all* of the questions.
4. Select the values deemed by your group to be truly authentic core values. As a general guideline: a value is truly “core” to your group if two-thirds of your group members answered “Yes” to *all* of the test questions for that core value.
5. Do a final check on the core values to ensure that none of them fall into the category of “aspiration for the future” rather than authentic core values. Note: people frequently confuse timeless core values—what you truly believe and have always believed at a deep core level—with aspirations of what you’d like to see the organization become in the future. You may have such an aspiration, but if you are honest with yourself and it is not a core value for the people in your breakout group, the place to put it is in the vivid description aspect of the Envisioned Future. Do *not* mix future aspirations into your true and authentic core values, as this will create justifiable cynicism and destroy the power of your core values. For example, a group that has never held innovation as a core value should not put innovation into its list of core values, even if it sees innovation as a vital strategy for its future. Instead, it should make innovation part of its Envisioned Future a quality that it wants to stimulate progress toward. Remember, the only items that truly qualify as core values as those that meet *all* of the above test questions with a resounding and unqualified “Yes!” especially the question “would you continue to hold it if it were a strategic *dis*advantage?”
6. Write the core values on a flip chart.

## A Few Examples of Core Purpose

3M	To solve unsolved problems innovatively
Boeing	To push the leading edge of aviation, taking on huge challenges and doing what others cannot do
Merck	To preserve and improve human life
Nike	To experience the emotion of competition, winning, and crushing competitors
Telecare	To help people with mental impairments realize their full potential
Teaching Co	To ignite in all people the passion for learning
Sony	To experience the sheer joy of advancing and applying technology for the benefit of the public
Becton-Dickinson	To help all people lead healthy lives
Walt Disney	To make people happy
Fannie Mae	To strengthen the social fabric by democratizing home ownership
Times Mirror	To contribute to the performance of the communities we serve
Marriott	To make people away from home feel they are among friends and really wanted
Mary Kay	To give unlimited opportunity to women
McKinsey	To help leading corporations and governments be more successful
Taylor Corp	To provide entrepreneurial opportunity and security for our people
WL Gore	To have fun doing innovative things that make money
Israel	To provide a secure place on Earth for the Jewish people
Patagonia	To be a role model and tool for social change
Univ. of Texas	To transform lives through inspired learning
Wal-Mart	To give ordinary folk the chance to buy the same things as rich people

## Core Purpose Breakout Session

*Estimated Time: 45 minutes*

1. Each person read to the group his or her proposed statement of purpose and describe why he or she finds it inspirational.
2. Each individual select the purpose from the above readings that he or she feels best meets the following criteria, **excluding their own developed purpose**. (In other words, you cannot vote for or advocate your own; you must advocate a purpose developed by one of the other group members.)

YES	NO	Do you find this purpose personally inspiring?
YES	NO	Can you envision this purpose being as valid 100 years from now as it is today?
YES	NO	Does the purpose help you think expansively about the long-term possibilities and range of activities the organization can consider over the next 100 years, beyond its current products, services, markets, industries, and strategies? (For example, Disney's purpose to make people happy helped propel the company from its initial strategy of cartoons into full-length feature animation, the Mickey Mouse Club, Disneyland, EPCOT Center, and so on.)
YES	NO	Does the purpose help you to decide what activities to <i>not</i> pursue, to eliminate from consideration? (For example, HP would not pursue markets where there are no opportunities to make a technical contribution.)
YES	NO	Is this purpose <i>authentic</i> —something true to what the organization is all about—not merely words on paper that “sound nice”?
YES	NO	Would this purpose be greeted with enthusiasm rather than cynicism by a broad base of people in the organization?
YES	NO	When telling your children and/or other loved ones what you do for a living, would you feel proud in describing your work in terms of this purpose?

3. As a group, select the purpose that best the meets the above test questions.
4. Test the purpose by taking a few minutes of solo time for *each individual* to ask of himself or herself the test questions listed above.
5. If most of the people in the group cannot answer “Yes” to *all* of the above questions, then you have not yet succeeded in developing a good core purpose. Keep working on the purpose until at least two-thirds of the people in your group can honestly answer “Yes” to *all* of the questions (it’s ok to modify the selected purpose, if necessary).
6. Write the selected core purpose on a flip chart.

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## Envisioned Future Criteria

**KEEP IN MIND:** this is NOT a wordsmithing exercise. This is an exercise to set a goal—to pick the mountain you are trying to climb—not to create a perfect “statement.” In fact, the goal should be something that could be expressed multiple ways, yet still be the same goal. I call this the “Mount Everest Standard”: Climb Mount Everest = Climb the biggest mountain in the world = Climb the mountain next to Makalu = Climb the mountain climbed first by Hillary and Norgay in 1953 = Climb the most famous mountain in the world = Climb the mountain that has killed more climbers than any other = Climb the mountain at coordinates Longitude 87 degrees east 28 degrees north = Climb the mountain in Nepal of 8,848 meters in height = Climb the mountain in Nepal of 29,028 feet = Climb the mountain named after Sir George Everest = Climb the peak most written about in *Outside* magazine in the past five years, and so on.

Certainly, some of these phrases inspire more than others, but the point is that the goal itself counts most. The BHAG process is not about sloganeering or wordsmithing. It is about goal setting. It is about picking a goal that will stimulate change and progress and making a resolute commitment to it. This is *not* about writing a “mission statement.” This is about going on a mission!

## BHAG Breakout Session

*Estimated Time: 45 minutes*

1. Each person take a moment to envision and write an article that they would love to see published about the organization 15 years from now. Include the name of the publication in which he or she would like to see it appear.
2. Transform the three to five most exciting vivid snippets from your articles into vivid descriptions that bring the envisioned future to life and write these on a flip chart. Test the vivid description against these test questions:

YES	NO	Does the Vivid Description conjure up pictures and images of what it will be like to achieve your vision? <b>IF THE VIVID DESCRIPTION DOES NOT CREATE A CLEAR PICTURE IN YOUR MIND’S EYE, THEN IT IS NOT VIVID ENOUGH.</b>
YES	NO	Does it use specific, concrete examples and analogies to bring the vision to life, rather than bland platitudes?
YES	NO	Does it express passion, intensity, and emotion?
YES	NO	When reading the vivid description, do you think, “Wow, it would be really fantastic to make all this happen. I would really want to be a part of that, and I’m willing to put out significant effort to realize this vision!”?



3. As a group, select or create a 10- to 30-year BHAG for the organization that encapsulates the vivid description *and* that is linked somehow back to the core purpose. (Refer to the BHAG examples on page 72 of the Collins/Porras *Harvard Business Review* reprint.)
4. Test the BHAG against the following questions. If you cannot answer “Yes” to each of these questions, then you have not yet succeeded in developing a good BHAG. When you have created a BHAG to which two-thirds of the group can answer “Yes” to *all* questions, write it on a flip chart.

YES	NO	Do you find this BHAG exciting?
YES	NO	Is the BHAG clear, compelling, and easy to grasp?
YES	NO	Does this BHAG somehow connect to the core purpose?
YES	NO	Will this BHAG be exciting to a broad base of people in the organization, not just those with executive responsibility?
YES	NO	Is it undeniably a Big Hairy Audacious <i>Goal</i> , not a verbose, hard to understand, convoluted, impossible to remember mission or vision “statement”? In other words, does it pass the “Mount Everest Standard”?
YES	NO	Do you believe the organization has <i>less</i> than 100% chance of achieving the BHAG (50% to 70% chance is ideal) yet at the same time believe the organization <i>can</i> achieve the BHAG if fully committed?
YES	NO	Will achieving the BHAG require a quantum step in the capabilities and characteristics of the organization?
YES	NO	In 25 years, would you be able to tell if you have achieved the BHAG?

## A Few Examples of the Complete Vision Framework

SONY (1954)	
CORE IDEOLOGY	ENVISIONED FUTURE
<b>Core Purpose</b>	<b>25-Year BHAG</b>
To experience the sheer joy of innovation and the application of technology for the benefit and pleasure of the general public	Become the company most known for changing the worldwide image of Japanese products as being of poor quality
<b>Core Values</b>	<b>Vivid Description</b>
<p>Elevation of the Japanese culture and national status</p> <p>Being a pioneer—not following others; doing the impossible</p> <p>Encouraging individual ability and creativity</p>	<p>We will create products that become pervasive around the. ... We will be the first Japanese company to go into the American market and distribute directly. ... We will succeed with innovations like the transistor radio that American companies have failed at. ... Fifty years from now, our brand name will be as well known as any on Earth ... and will signify innovation and quality that rivals the most innovative companies anywhere. ... “Made in Japan” will mean something fine, not shoddy. ...</p>

**Granite Rock Vision (1988)**

CORE IDEOLOGY	ENVISIONED FUTURE
<b>Core Purpose</b>	<b>25-Year BHAG</b>
To provide ever-improved products of lasting value	Become a role-model total-quality company by the standards of <i>any</i> industry
<b>Core Values</b>	<b>Vivid Description</b>
Integrity	We will be as people-oriented as Hewlett Packard. ... We will attain customer satisfaction unsurpassed even by Nordstrom. ... We will continually gain market share despite a price premium on commodity products. ... We will be studied by business schools for our sophisticated use of technology. ... Our people will continually seek and attain training and development beyond the best at Motorola. ... People will see HQ as where invoices are printed, not where to look for decisions. ... We will win the Malcolm Baldrige National Quality Award more than once.
Continuous improvement as a way of life	
Customer satisfaction	
People growth and development	
Job ownership	

**Hewlett-Packard (1950s)****CORE IDEOLOGY****ENVISIONED FUTURE****Core Purpose****25-Year BHAG**

To make technical contributions for the advancement of science and welfare of humanity

Become widely influential as a role model social institution and one of the best managed corporations in the world

**Core Values****Vivid Description**

Respect for the individual

Affordable quality and reliability

Collaborative creativity

Community contribution and responsibility

Profitable growth

We will consistently deliver products that make a technical contribution and improve the lives of our customers. ... We will attract the best graduates from top universities and provide them an environment to be creative. ... We will maintain our entrepreneurial drive even as we attain significant size. ... HP people will share in the success of the company, making large numbers of them wealthy. ... HP people will be enthusiastic about, loyal to, and proud of their company to an unusual degree. ... They will feel that senior management works for *them*, not the other way around. ... We will maintain this spirit, even as we become a multi billion-dollar, profitable growth company with tens of thousands of people. ... By virtue of our success and progressive management methods, we will have a significant impact on the way companies are managed around the world.

Teaching Company (1990s)	
CORE IDEOLOGY	ENVISIONED FUTURE
Core Purpose	25-Year BHAG
To ignite in all people the passion for learning	Create and bring forth the best collegiate and high school programs that have ever been invented
Core Values	Vivid Description
<p>Excellence: Get the best, then make it better</p> <p>Cultivate every resource; pull weeds immediately</p> <p>Results-oriented work ethic</p> <p>Fair and generous relationships with our people and customers; expect the same in return</p> <p>Integrity. Period.</p>	<p>Our reason for being is to set minds on fire. Make every customer touch point a place where that's what we do every marketing piece, every phone call, every Web visit, every package and piece of mail. ... Our programs will be featured in <i>Time</i> or <i>Newsweek</i> as one of the primary contributors to the radical improvement in high-school performance in the United States. ... Ivy League graduates will tell us that they received more and better learning through our programs than they got in college. ... Hundreds of thousands of people who never finished high school will become devoted learners of great literature, philosophy, and science. ... Prison inmates will learn about Plato and Darwin and Faulkner and ask for more. ... The best teachers in the world will reach 1,000 times the number of students they now reach.</p>

## PUTTING IT ALL TOGETHER: Creating the Mars Group and Beyond

Once you've worked through each piece of the Vision Framework (core values, core purpose, BHAG, vivid description), you should put together a special team—"The Mars Group"—to take the output of all the groups and distill them into a consolidated draft of the final overall vision for the organization (see examples).

The "Mars Group" works like this: Imagine you've been asked to recreate the very best attributes of your organization on another planet, but you only have seats on the rocket ship for five to seven people. Who would you send? They are the people who are likely to be exemplars of the organization's core values and purpose, have the highest level of credibility with their peers, and the highest levels of competence. One method is to have all the people involved in the process nominate a Mars group of five to seven individuals (not all need to come from the assembled group), and those most nominated become members. Generally, it is best to have the Mars group not include the top officers of the organization. Then, later, those top officers can respond to the output of the Mars group to create a final articulation of the vision.

## The Complete Vision Framework

Once the vision is complete, think of it as the highest level of a cascading framework:



Which is then brought to life by articulating the overall vision for the organization:



Which is then implemented by creating:

- 5-Year Base Camp objectives on the way to the BHAG
- Strategies for achieving those objectives
- Tactics required for implementing the strategies