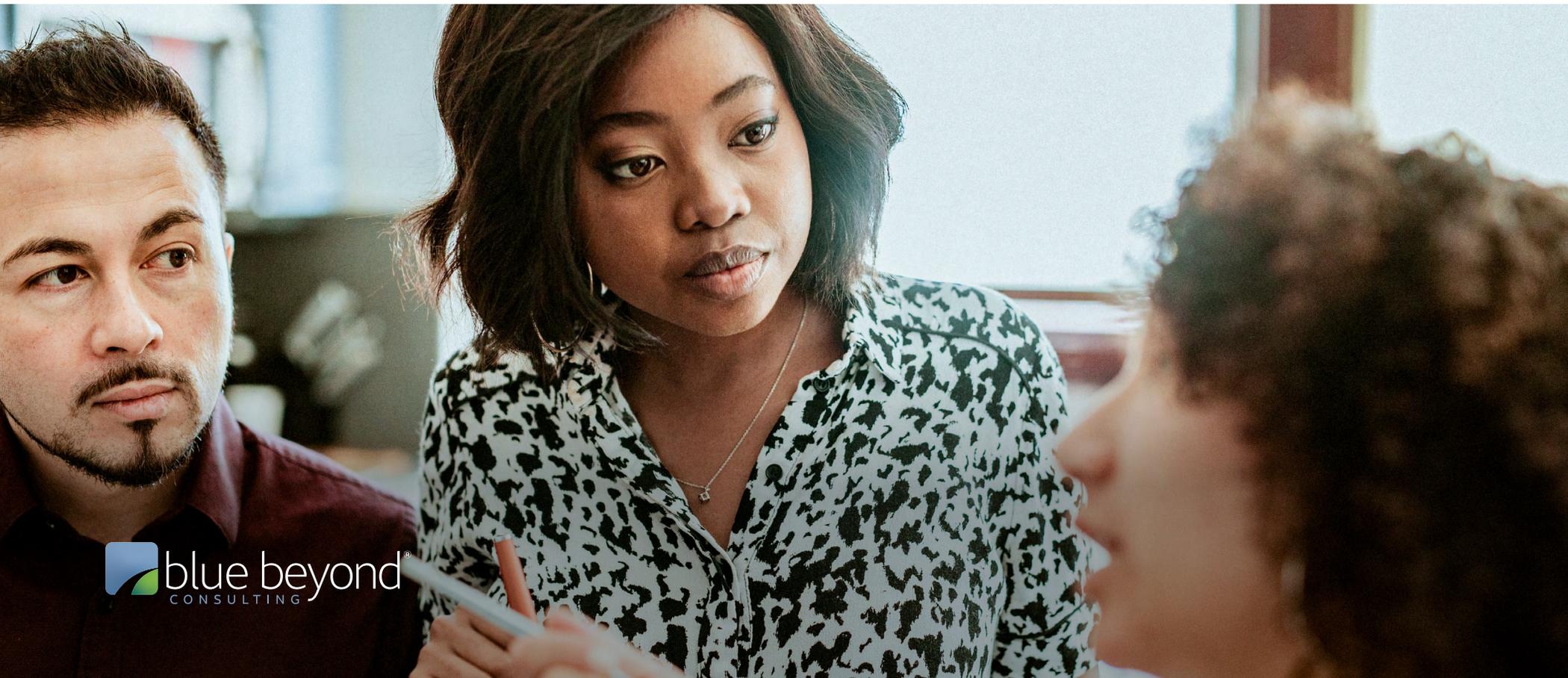


# Defining team values



Values are the cornerstone of team culture and should reflect the commitments you make to one another and to your other key stakeholders. Values Navigator™ Cards provide a simple tool to help you guide your team through the process of defining the values that matter most to you and reflect how you work together when you're at your best.

Blue Beyond's Values Navigator Cards are a comprehensive set of cards that feature 88 universal organizational values.

### Through this exercise, you'll explore:

- The values that are central to your team's success now and in the future;
- Where your team is aligned and where team members have different points of view;
- Aligning on a set of core values and defining the behaviors that support them.

## Let's get started!

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# Initial planning & preparation

## Clarify your business purpose and strategy

Before you kick off your values workshops, start by ensuring that your team understands your company's business strategy and purpose. Consult with business leaders, review relevant materials, and/or consider inviting leaders to talk with your team about the business strategy and purpose. Reinforce your team's understanding and alignment by summarizing what they heard and understood.

## Organize your workshops

Plan for two separate workshops – each will be about 90 minutes. Send your team invitations to both Values Navigator workshops.



# Workshop #1

## Supplies and setup

- Arrange the room so the entire team is seated together at a large table where each person has space to spread out and sort their values cards. Put several tables together to form one larger table if needed.
- Gather your supplies:
  - > 1 flipchart
  - > 1 marker
  - > 1 deck of Values Navigator Cards for each person
  - > 3 small post-it notes or dot stickers for each person



### PRO TIP

Refer to Blue Beyond's [Facilitator Tips & Tricks](#) for effective ways to engage your group.



## Facilitator's agenda

TIME	PROCESS	SUPPLIES
5 Minutes	<p><b>Welcome and overview:</b> Welcome the group and thank them for participating in this important work to align on the values that will help define your team's culture. Walk through the objectives of the workshop:</p> <ul style="list-style-type: none"><li>• Surface and discuss the values that each of you individually see as central to your organization's success now and in the future.</li><li>• Explore areas of alignment and where you have different points of view.</li><li>• Align on next steps to refine and land your organizational values.</li></ul> <p>Introduce the group to the Values Navigator Cards and how they'll be used.</p>	N/A
20-25 Minutes	<p><b>Sort the Values Navigator Cards:</b> Provide each person with a set of values cards and ask them to do the following:</p> <ul style="list-style-type: none"><li> <b>5 MIN:</b> Independently review all the cards in the deck.</li><li> <b>NOTE:</b> There are blank cards that can be used to add values that are not already in the deck.</li><li> <b>10-15 MIN:</b> Sort the cards into three piles:<ul style="list-style-type: none"><li>• <b>Yes</b> – these values are essential to who we are and the way we work. Values in the 'Yes' group don't have to reflect the current state; they can be aspirational.</li><li>• <b>Maybe</b> – these values could be ones the person isn't sure of or that they want to come back to.</li><li>• <b>No</b> – these values don't reflect our team's culture or ways of working.</li></ul><p>As they sort the cards, ask people to consider:</p><ul style="list-style-type: none"><li>• Who are we as a team and who do we aspire to be?</li><li>• How does this value contribute to our strategy and purpose?</li><li>• Do I understand how this value shows up in my day-to-day role?</li></ul></li><li> <b>5 MIN:</b> Review the cards in the 'Yes' and 'Maybe' piles. Decide on your top 5 (or fewer) values and reflect on why you think these values are most important.</li></ul>	<ul style="list-style-type: none"><li>• 1 set of Values Navigator Cards per person</li></ul>

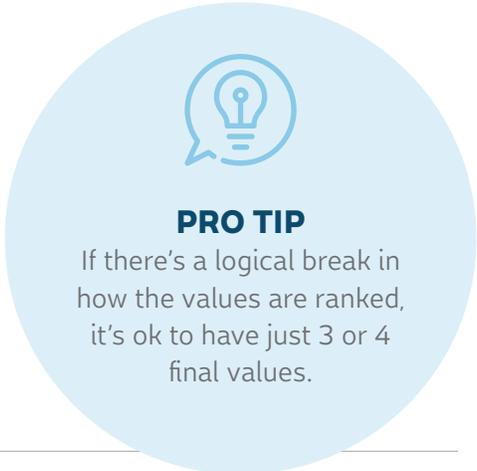


### PRO TIP

Need help narrowing it down?  
Try clustering similar values together, then discussing to select the best one from each group.

continued →

TIME	PROCESS	SUPPLIES
35-55 Minutes	<p><b>Align on your team values</b></p> <p> <b>10-15 MIN:</b> Ask each person to share the values that they identified as most critical to your team’s success and why. On a flipchart in front of the room, create a list of the values as they are shared. If a particular value is already on the list as you take turns sharing, you don’t need to repeat it on the flipchart.</p> <p> <b>5 MIN:</b> Once everyone has presented, invite the team to come up to the flipchart and place a post-it note or dot sticker on the three values they think are most essential.</p> <p> <b>10-15 MIN:</b> Facilitate a discussion about the patterns and the differences you observe:</p> <ul style="list-style-type: none"> <li>• Where do we see the most alignment?</li> <li>• Where are there differing perspectives?</li> <li>• If your team has existing values, how do the top values the group identified align or differ?</li> </ul> <p> <b>5-10 MIN:</b> Count the stickers and name the top 5 values that received the most votes. If there is a tie for the final spot, ask for volunteers to explain why they feel the value they identified should be included.</p> <p> <b>5-10 MIN:</b> Align as a group on the final 5.</p>	<ul style="list-style-type: none"> <li>• 1 flipchart</li> <li>• 1 marker</li> <li>• 3 post-it notes or dot stickers per person</li> </ul>
5 Minutes	<p><b>Thank you and next steps:</b> Thank the team for their participation and engagement, summarize what they can expect next, and remind them about the time and date for the second workshop (see Follow-up and prep below).</p>	N/A



**PRO TIP**  
If there’s a logical break in how the values are ranked, it’s ok to have just 3 or 4 final values.

## Follow-up and prep for workshop #2

Send a follow-up email to the group with a list of the top 5 values they identified. Ask them to observe and reflect on how they see these values showing up in the team before your next workshop

# Workshop #2

## Supplies and setup

- Arrange the room so the team is seated around a table where they can work together.
- Gather your supplies:
  - > 1 flipchart and marker for each value
  - > 1 pen per person
  - > 1 printed [Values in Action Worksheet](#) for each person



## Facilitator's agenda

TIME	PROCESS	SUPPLIES
5 Minutes	<b>Welcome and overview:</b> Thank the team for their input in the first workshop and review the 5 (or fewer) values that you all aligned on.	N/A
20-25 Minutes	<b>Define the behaviors that support each value:</b> Divide the team into 3-5 groups (one per value) and assign each one a different value. Give each person a <a href="#">Values in Action Worksheet</a> and provide the following instructions: <ul style="list-style-type: none"><li>• As a group, use this worksheet to define this value. For example, if one of your final values is "Respect", you may decide that this is defined as, "Everyone on our team is valued and deserves the same level of respect".</li><li>• Next, work together to identify one or two actions or behaviors that demonstrate this value in action. The Values in Action Worksheet includes examples. Encourage groups to use the prompt, "This means we..."</li><li>• Record the definitions and behaviors for the value you've been assigned on your flipchart.</li></ul>	<ul style="list-style-type: none"><li>• 1 Values in Action Worksheet per person</li><li>• 1 pen per person</li><li>• 1 flipchart per group</li><li>• 1 marker per group</li></ul>
40-45 Minutes	<b>Report out and build alignment</b> <ul style="list-style-type: none"><li>🕒 <b>25-30 MIN:</b> Ask each group to identify a spokesperson to share the definitions and behaviors their group developed.</li><li>🕒 <b>15-20 MIN:</b> Once each value has been reviewed, facilitate a discussion with the group:<ul style="list-style-type: none"><li>• Do these values reflect the essence of who we are as a team when we're at our best?</li><li>• Is there anything that needs to be clarified or added?</li><li>• Will these definitions and behaviors help our team succeed now and in the future?</li></ul></li></ul>	N/A
5 Minutes	<b>Thank you and next steps:</b> Thank the group for their participation and engagement, summarize the output of the two workshops, and let them know what they can expect next.	



### PRO TIP

If you have fewer than 8-10 people on the team, consider allocating additional time and working through this activity for each value together rather than splitting into subgroups.

# Follow up

## Once you've done any final fine-tuning, it's time to activate your values as a team.

- Actively promote core values and keep them top of mind.
- Embed values throughout your team processes, practices, and tools.
- Establish a cadence for regularly discussing your values as a team, celebrating the values in action, and challenging contradictory patterns and behaviors.

You'll find additional tips to support you on your values journey in our [Core Values Assessment](#).

## Blue Beyond is available for enhanced consultation and support, including:

- Helping you translate the outputs of your team's work into your purpose, vision, and strategy.
- Working with you to embed your values into your team processes, practices, and tools.
- Providing compelling visual design to translate your values into images that tell the story of how your values show up in your organization.



# valuesnavigator™

## CONTACT US:

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or 510-733-5417.



Blue Beyond is a management consulting firm that specializes in the people side of business – culture, talent, organizational effectiveness, change management, communications, and diversity, equity, and inclusion. We serve clients throughout North America and globally, including Fortune 500 companies, non-profits, universities, and small- and mid-sized firms. Founded in 2006, Blue Beyond is headquartered in the San Francisco Bay Area with additional team members across the U.S.

Learn more at [bluebeyondconsulting.com](http://bluebeyondconsulting.com) or call 510-733-5417

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