

Operationalizing Your Values

A Step-by-Step Process for Groups and Teams

Organizations thrive when there is a shared language and commitment to a set of behaviors that align with the stated core values. Below is a process that can be used to help your organization put their values into practice.

This exercise is a way for executive teams, culture/HR/talent teams, and people managers to get clear on the specific behaviors that are expected, encouraged, and that will advance the cause of iCCM institutionalization.

The recommended group size for this exercise is between 8-20 participants, though the participant number can flex up or down depending on your organization. Please identify a facilitator to take the group through this process and block off at least 90 minutes for the facilitator to conduct this exercise. This exercise assumes that your organization and/or team's core values have already been established. If that's the case, let's get started!

Prep Work

Materials Checklist

1. Large poster-sized post-its or flip chart paper and tape (one sheet per value)
2. A few pads of sticky notes per participant
3. Writing pens and markers
4. A list of your organization's values
5. Behaviors list*

*You are encouraged to pick behaviors that resonate for you, but also to develop new behaviors that meet your needs. The behaviors list is worded as "I statements" (e.g., "I take responsibility for our client's experience"). Depending on how you plan to use your final behaviors list, you might want to change the wording of the behaviors to "we" (e.g., "We take responsibility for our client's experience").

Process for Operationalizing Your Values

Step 1 | Write each organization value on the top of a poster page and post in the room (one value per sheet).

Step 2 | Ask each person to focus on the first value and identify the behaviors that they believe would support that value. Let participants know that they can use the behaviors list or come up with their own observable behaviors.

Participants write one behavior per sticky note. They may end up with 10 or 100 behaviors per value, and that's ok. Start big and you can edit through this process.

Repeat this process for each value, confirming that people have had enough time before you move on.

Step 3 | When you've moved through all of the values, each team member will post their sticky notes on the corresponding value sheet. There's no need to take turns. Have everyone get up and place their sticky notes at one time. Let everyone know that there will be an opportunity to look at the collection once everything is posted.

Step 4 | Give participants the opportunity to do a "silent walk" and spend ten minutes or so walking around and reading the behaviors. Make sure the "silent" part is reinforced because sometimes people start pointing to a specific contribution and the contributor is standing right there.

Step 5 | After the silent walk, assign a working group to each value. For example, if you have 5 values and 12 team members – you will have teams of two or three people who will work together. If your working team is smaller, adjust the group size as needed. For example, a small group of 2-5 people could work together to review two or more sheets, or assign one person per sheet.

Step 6 | Each working group looks for patterns and themes under each value. On the flipchart, write the common behaviors identified by the group for each value. Consider keeping the sticky notes for eliminated outliers to decide later whether they fit better with a value that another team is working on.

Step 7 | Each team presents their value and aligned behaviors to the full team. It's important to ask questions and pressure-test the behaviors by talking through real examples of what happens in your organization.

Some suggested questions:

1. Are there current behaviors that are considered normal in your organization, yet they get in the way of good work? If so, have you included behaviors that address or limit these actions?
2. What are you willing to commit to for the long-term?
3. What are the behaviors that we will actually hold people accountable for during goal setting, feedback conversations/check-ins, and performance evaluations?

You now have a draft list of behaviors that are aligned with your organization's values. Now the work begins within your organization to make it stick. At the close of your meeting, get clear



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about next steps for ways to integrate these behaviors into how your organization engages with each other and your partners as you work towards advancing iCCM institutionalization.

(Adapted from Brene Brown's Dare to Lead Operationalizing Your Values: A Step-by-Step Process for Groups and Teams -

<https://brenebrown.com/resources/operationalizing-your-values-a-step-by-step-process-for-groups-and-teams/>)