

Published By The American Society for Training & Development

Training & Development

MARCH 1998 • \$10.00

**FREE ASTD
BENCHMARKING
OPPORTUNITY!**
Training evaluation
tool packaged with
this issue.

How To Link Personal Values With Team Values

**The Kept-On Workforce • Unleash Your Boss's Inner Gearhead •
Training Management Software Roundup**

ASTD

Here's how companies such as Levi Strauss, AT&T, and Nordstrom conduct a values discussion to resolve conflicts between people's personal values and those of their team or organization. The result is behavior that expresses the desired values and workers' commitment to company goals.

How To Link

PERSONAL VALUES

With

TEAM VALUES

Around tables in a large meeting room, the 200 top worldwide managers of the largest division of Levi Strauss were selecting their key personal values from a deck of 50 "values cards." Each person arranged the cards according to his or her most important and least important values, and then placed his or her name card on the piles. Next, the whole group walked around the room looking at each array. People were amazed at the diversity of the values and at the range of values people selected as most important. They could begin to understand how the values lay behind each manager's workstyle. Each table of participants then had a rich discussion on how their values led them to act the way they did at work.

BY DENNIS T. JAFFE AND CYNTHIA D. SCOTT

Next, people at each table came up with a set of seven core values that they felt should be adopted by the whole division. There were lively debates about which ones were most important for their work and were essential to continued high performance. Each table then shared its proposed values with the whole group. A recorder wrote the common values on a flipchart at the front of the room and tallied the most frequently named ones. Next, a company leader shared his core values and the thoughts behind them. The whole group then worked to develop a set of shared values. Last, small groups worked with each core value to create a Values Statement that reflected their understanding and application of each value to their work.

Participants didn't stop there. Many have used the workshop's design and values cards to lead their own teams in a similar values discussion.

Why is Levi Strauss, a company known for its strong values defined in a Corporate Aspirations Statement, spending valuable management retreat time looking yet again at personal and organizational values? CEO

Robert Haas noted his philosophy in an interview in *Harvard Business Review*: "We've learned...that the soft stuff and the hard stuff are becoming increasingly intertwined. A company's values—what it stands for, what its people believe in—are crucial to its competitive success. Indeed, values drive the business."

At Levi Strauss, a simple statement isn't enough. Values are considered a living element and evolving foundation behind every business decision. Values exploration is not a one-time event, but a continuing process in which people look at what is important and how that importance is expressed in action.

Essence based

We call an organization that is aware of and focused around its core values, vision, and mission an essence-based organization. As we continue to live in a world of continual change, what can be constant and unchanging are an organization's core values. A company that commits to defining and leveraging its employees' values is developing its strength and capability to meet future

challenges. Values work is no longer a soft, fuzzy pursuit.

Personal values provide an important bridge to team values that everyone can commit to. Personal values are real in that they help guide people's behavior. Thought of in that way, clarifying values can help teams with the following key actions to achieve excellence:

Motivate commitment. Values can help employees find meaning and purpose in their work, care about what their company is doing, and link their individual efforts to those of the entire company.

Align action. With employees having to make many complex decisions, values offer a set of guiding principles.

Transcend individual conflicts. Values provide a language and way of understanding individual differences. They also help open the door for nonjudgmental acceptance of different ways of doing things.

Values are powerful motivators. They represent an organizing principle for people's lives, as well as for organizations.

The word *value* is defined by *Webster's* as "a principle, standard, or

A STARTING POINT

When we started to ask about key values, we found that some people had difficulty coming up with a comprehensive list. So, after many years of collecting lists of values, we created a values kit to help individuals and teams sort their values. The following categories represent the main areas in which we have grouped our values search.

Mastery

Values in this category represent individual pursuits, in which success is defined in terms of mastery, status, power, and position. This value cluster focuses on achievement in the world. People motivated by such values seek visible achievements and recognition from others. They want to be in positions of authority and seen as winners in competitive situations.

Self-development

The values in this category represent the search for personal challenge, growth, and creativity. This cluster is associated with experiential learning, inner-development, self-actualization, and challenge seeking. People with these values want to be involved in challenging, meaningful projects that expand their capabilities. They value new experiences and personal development activities.

Relationship

This values cluster represents people whose primary motivation is seen in terms of developing personal relationships, helping and working with other people, feeling part of a group or team, and sharing experience. People with these values seek validation from others and define their achievements in terms of

what they've done for and with others. They seek contact and community at work, and they value their standing with others.

Continuity

The values in this category focus on enduring qualities and maintaining the status quo. Such values are associated with an appreciation of tradition—knowing where things fit and how people will treat each other—and with control and predictability. People with these values don't like surprises or things out of order.

People

This cluster of values is about how people feel they should treat others and the underlying principles that guide personal relationships.

quality considered inherently worthwhile or desirable.” The root for value is *valor*, which means strength. Values are a source of strength because they give people the power to take action. Values are deep and emotional, difficult to change and often unconscious.

Personal values change over time, just as organizational values need to, because the environment people live and work in is changing. One’s values adapt. Sometimes, people (mistakenly) think of values as “shoulds” on what to do and not do. Rather, values are energizing, motivating, and inspiring. When people care passionately about something—in other words, value it—they can spur themselves to great achievements.

If people all had the same values with the same priorities, it would be easy for them to work together in groups. But in most teams, there’s a diversity of value and beliefs. To work better as a team and make decisions that lead to commitment and action, it’s necessary to recognize the range of values that can influence decision making and to agree on their priority.

In conducting values workshops with more than 200 organizations, we found that these core values come up routinely:

- * integrity
- * competence
- * teamwork
- * communication
- * autonomy
- * creativity
- * personal growth.

That gives us a picture of the kind of values people want to see reflected in their workplaces. Such values support high performance. It’s powerful to see what happens when a company or team tries to put those values into action, in its own unique way.

Accept no substitute

First, it’s essential for a team to clarify its values. When team members collaborate on what’s most important to them, a shared commitment can emerge. You can’t just give a team or an organization a values statement, as some leaders try to. They can suggest important values, but there’s no substitute or short-cut



• *Values work
is no longer
a soft,
fuzzy
pursuit* •

for having a team talk about its most important values and coming to consensus on those it supports.

At work, as in other areas of life, people assume certain basic values exist, and they act on them. But rarely do they define them clearly or question them. Organizations must determine their values and incorporate them into their policies, practices, and standards for behavior. Company or group values can motivate people to act and focus their behavior in all of their activities.

For example, Nordstrom asks employees to act according to one value: satisfying customers. Each employee

applies that value in an individual way, learning new tips and actions from colleagues continually. Thus, one value leads to employees creating new ways to act on that value. However, because people value different things, gaining consensus about key values is important for any group. Nordstrom employees at every level must face customers, make costly decisions, and balance competing priorities. Traditionally, consensus has been achieved through strict procedures and standards of behavior, under the control of supervisors. Now, with employees’ greater empowerment and autonomy, they need to be guided not by rules or a supervisor, but by an understanding of their organization’s most important values. If a decision fits the values, then it’s right.

A team’s values must also link to each member’s personal values. A recent survey of 1,460 managers and CEOs by the American Management Association suggests that understanding that link can enhance corporate vitality. The survey shows that when people’s personal values are seen as congruent with their company’s values, their personal lives are better and they feel more optimistic about their

A REAL-WORLD TEAM VALUES STATEMENT

A major outcome of the values retreat for the AT&T southwestern area management team was a values statement that included behavior that team members would expect to see more or less of if people were acting on each value.

Here’s a look at the team’s statement:

Value: communication. Provide for open dialogue and the exchange of views.

Value: creativity. We’re committed to a spirit of entrepreneurship and the innovation of new ways to achieve success.

Value: competency. We will embrace competency enthusiastically, always seeking to share and gain knowledge at every opportunity.

Value: teamwork. We foster an en-

vironment that supports team members cooperating to achieve our common goals. Our motto is “We, not me.”

Value: integrity. Act in line with the beliefs of your team, organization, or other unit.

Value: personal growth. We encourage people to take ownership of their individual learning plans, which address their personal needs and desires.

Value: achievement. Because we value achievement, we commit to quick decision making, in which we win early and often, and to the imperative “Just do it!” with guts and courage.

Value: family. We recognize and acknowledge the importance of our families and their contribution to our success.

jobs. The lack of a relationship between employees' values and company policies can be the breeding ground for conflict and cynicism.

The utilities company, Puget Sound Power, initiated a series of focus groups to explore personal and organizational values. After looking at the company's core values, the groups examined how those values linked to workers' individual values. They found that employees felt pressured to find personal time while achieving high work performance. Identifying that stress led to exploring ways to maintain work and family balance. The values discussion brought to the surface issues that interfered with people's commitment to the company. Crucially, it then helped minimize or overcome the conflicts.

Hello, walls

Too many companies and teams create values statements for the walls rather than to change behavior. When we showed one management team

• *Too many companies and teams create values statements for the walls* •

a list of values, it asked where the list came from. We revealed that it was from the team's own executive retreat the previous year.

A team or company has to specify the kinds of behavior that would result if people followed the identified values. What would people try to do and not do? How can an organization reward such values? One company had a value on teamwork, but rewarded managers for individual results. Companies have to consider how they may be making it difficult to sustain values and what they can do to minimize the conflicts that result from people's personal values not being the same as others' values or their organization's.

When teams and organizations take their employees' values seriously and strive to live by them, they send an important message. They demonstrate that they're ready not to accommodate everything employees want, but to at least reflect seriously about their needs. That helps mint the currency between individuals and an organization—trust and credibility.

In addition, respecting employees' needs is likely to get them to help their company respond to challenges. And it makes it clear to current and prospective employees what a company stands for.

Not just motherhood and apple pie

AT&T's southwest area managers held a workshop to explore personal and organizational values. The workshop used values as a framework to build commitment and alignment between individuals, teams, and the company. The expectation was that by generating shared values, teams would be better able to resolve day-to-day hassles and act in ways that supported the entire company.

As in the Levi Strauss workshop, each manager defined his or her personal values and shared them with others. Then, the participants identified values that defined high performance within their teams. After much discussion, each team developed a team values statement of the behaviors it wanted to see more of and less of from team members. The values weren't just motherhood and apple pie. Indeed, after agreeing on the first four values, the group had a lively debate on the importance of second-tier values. The discussion went beyond abstract statements to specify exactly what each value meant.

The workshop led to a greater appreciation of people's diversity. Participants looked at each others' key values and saw how different values were sometimes the root of work disagreements. Participants saw how different values were sometimes the root of work disagreements. The group placed its individual and team

• *Participants saw how different values were sometimes the root of work disagreements* •

values on a large Values Map, which each team could display.

One of the division goals was to create a virtual organization, in which people worked in teams at widely dispersed locations. After the workshop, each manager received materials and was encouraged to hold a similar workshop with his or her team.

In telephone interviews two months following the workshop, participants were still enthusiastic about the results and gave specific examples of how it was useful. More than half of the managers had implemented (or were about to implement) the values workshop with their teams.

They reported the following key benefits:

- * learning about each other
- * understanding and respecting diversity and individual differences
- * balancing different perspectives
- * helping create a team
- * overcoming conflict between people.

The managers felt that the best use of the values were with team members who were in conflict or with whom managers were having difficulty. The use of values enabled team members to look at differences in a nonjudgmental way and discuss working together more effectively.

How to conduct a values workshop

We have created a format for a team to initiate a discussion of values, conducted by a trainer or an external consultant or by the team's leader or manager. We prefer teaching managers how to conduct such discussions because we find that when a manager takes time to participate, that's more likely to lead to real

change. It demonstrates that the leader is taking team values seriously.

The workshop can be held by one team or several at separate tables. Each team can work on its own values statement or help define a set of values for the whole organization.

Step 1: Defining personal values.

Begin with personal values. Because people have different values, that helps participants see how many different priorities can exist. People can identify their personal values without further clarification, but we find that listing common values on a flipchart or giving people values cards gets more diverse ideas about what's important.

A Personal Values Exploration starts with participants sorting their personal values into the categories "very important," "somewhat important," and "less important"—indicating how central each value is in their work or lives. They may feel initially that all of their personal values are equally important, but the purpose of the values sort is to indicate values in order of their importance at that time in their lives. They should try to think of specific examples of how each value applies to their lives. If they can't think of specific examples, the value probably isn't a high priority.

Step 2: Sharing values with the team. After participants sort their values, it's time to share them with the team. Each member places a name tag at the top of his or her values list. Then, the group walks around the room looking at everyone's list, without commenting. Next, each participant chooses the person with the most similar values and has a discussion with that person on those values. The goal is for people to clarify together which values are central to their shared work.

Step 3: Creating a team values credo. In this step, team members work together to define their shared values. Taking off from the individual values lists and an understanding of the diverse values in their team (or larger group, business unit, or organization), they now must come up with a statement of shared values

• *Often, a team
has certain values
it feels are espoused but
not acted on* •

(their personal values) on how they want to work together as well as the values for achieving organizational and team goals.

After participants have sorted their personal values, they select five values they want expressed at work. Because not all of their personal values will be appropriate for the workplace, they should select ones they're willing to live by. Next, they take turns reading their number 1, most important values, which a recorder puts on a flipchart. If a value is already on the chart, the recorder places a check after it. Participants continue in like fashion until all values are recorded.

The participants then list the values in descending order of importance—from the one with the most check marks to those with no check marks. The result is a prioritized list of team values. Participants can also cluster some of the important values that are similar and give the clusters names that combine the meanings of the values in them.

Step 4: Creating a charter of team values. Each team can now use its list of key values as a foundation for discussion. It can discuss the key values and ways that team members express them in their behavior. They can ask which values aren't expressed frequently enough or tend to be forgotten—and which seem dispensable or are neglected in times of pressure. Such questions help team members explore to what degree they actually live their values and which are espoused but may be neglected or ignored. The team might identify some behaviors of a member that reflect a particular value, in order to clarify the value's essence and implications.

Here are some additional questions to consider in creating a team values statement:

- * What do we stand for?
- * How do we treat customers?
- * What do we mean by ethical behavior?
- * What core values are more important to us than profits?
- * How do we want to treat each other at work?
- * What do we offer employees for their work efforts?
- * How do we want to be seen by the outside community?
- * What employee attitudes and behaviors do we want to reward?

At this point, each value must be substantiated through one of two activities. One, participants can examine each value and discuss the behaviors they'd like or expect to see more or less of if people expressed that value at work. Two, they can create a statement that expresses how the team or company views particular values.

Often, a team has certain values it feels are espoused but not acted on. It might select which values it needs to develop or which are expressed but neglected. Then, team members can identify ways they can practice such values within their group. That can be a deep and powerful discussion, but it demands a high level of trust and willingness to raise issues.

Values are only one part of the renewal process in an organization seeking employees' commitment or a new direction. Exploring individual and team values is a critical foundation for major organizational change. A company must combine a values exploration with defining its vision and mission. That leads to organizational strategy and goals. A values discussion is critical because it helps clarify and align how a company will reach its goals. It's also a pathway for an organization to link its values with employees' personal values. That, in turn, is the basis for employees' commitment to the work of their organization. •

*Dennis T. Jaffe and Cynthia D. Scott are founding principals of Changeworks Consulting, 461 Second Street, Suite 232, San Francisco, CA 94107-1416. Phone 415.546.4488
www.changeworksglobal.com*