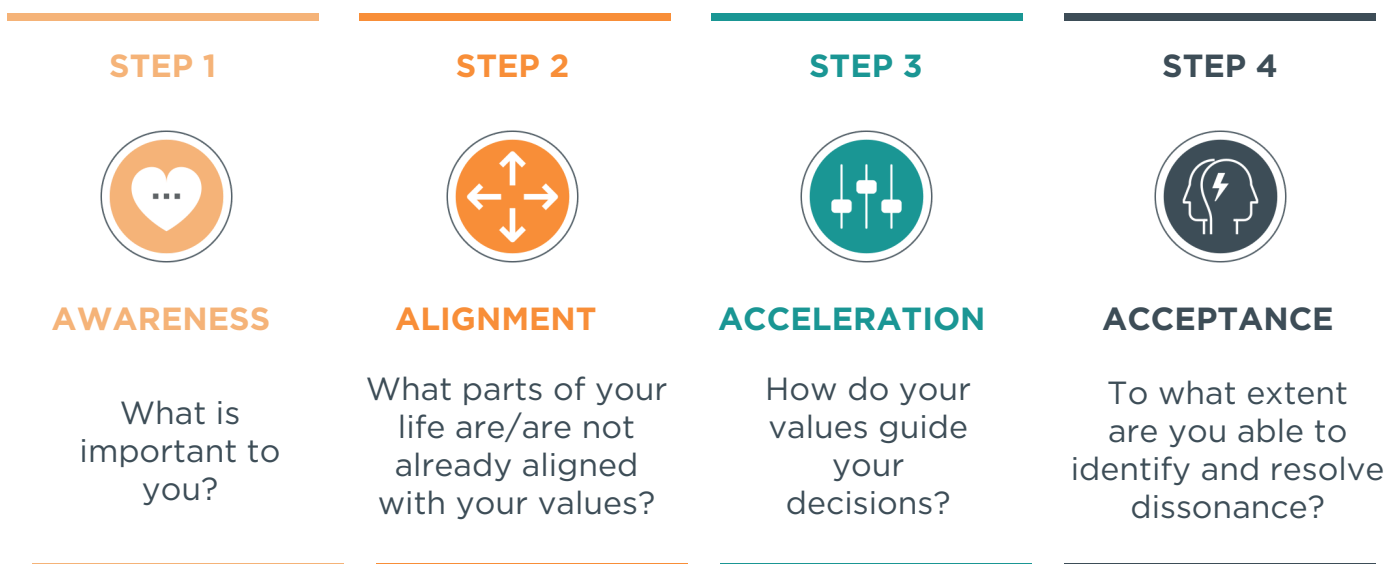


## Clarify and Align Values

Values are core to who we are, influencing our priorities, identity, and conduct, and yet too often, they are shrouded. Stripping back the layers helps us to clarify what truly matters and get to the heart of how we want to be known in the world. This resource is designed to help you make implicit values explicit.

In the short term, clarifying values can feel abstract and challenging. Once we are clear on our values, it can be challenging to assess how well our actions align with them. AIM's Four-Step Process is designed to help you reflect on and proactively clarify your values, which can foster greater alignment and integrity.

## AIM Leadership's Four Step Process



# Why Is There So Much Skepticism About Values?

Identifying values is hard and abstract work. It requires self-awareness, time, and attention. This is why most people fail to focus on values, but there are consequences. Don't forget - if everything matters, nothing matters.

Once you clarify your values, walking your talk is also challenging. This holds true for individuals and for companies.

## Case Study 1 | Values Alignment



J. is the CEO of a pharma company. He places a high premium on creating an inclusive culture. He also loves having fun. At one recent executive meeting, he discussed meeting out for lunch...this quickly morphed into a six-hour boating trip.

Through coaching, J. realized that not everyone wants to spend that much time with their colleagues or can take that much time away from family. With awareness, he called each team member in advance of the trip and shared his blunder (i.e., that his enthusiasm for fun left him overlooking some team members' needs). He also said the boating trip was an optional outing. In the end, 30% of the team opted not to come on the trip. J. learned that while living in alignment with his own values, he also needs to consider the values of his team members.

## Impact of Clarifying Values

**By engaging in values alignment, you can:**

- 1 Clarify what is important and why.
- 2 Understand the relationship between values and impact.
- 3 Develop a clear process for aligning your behaviors.
- 4 Create a mechanism to identify where and when there is a disconnect between your actions and values.

## Start Identifying Your Values With These Available Metrics



### Calendar (e.g., iCal)

#### Analyze how and where you spend your time:

- Are you spending it entirely at work?
- How much time do you spend with friends/family?
- Do you allow any dedicated time for personal well-being?
- Does your allocation of time reflect your values?
- What would you need to change to align your time with your perceived values?



### Debit/credit card statements

#### Analyze your spending habits:

- How much money do you spend versus save?
- Where and how are you investing your money each month?
- How much money do you spend on yourself versus other people (e.g. spouses, kids, or parents)?
- How much money do you spend on philanthropy?
- How much money do you spend on things that may be draining your energy (e.g., alcohol)?
- Does your allocation of money reflect your values?
- What would you need to change to align your spending habits with your perceived values?



### Google search history

#### Analyze your information habits:

- What types of sites do you repeatedly visit?
- Why are you visiting these sites (e.g., for work, to diagnose health concerns, carry out household tasks)?
- Do your information-seeking habits reflect your values?
- What would you need to change to align your information-seeking habits with your perceived values?

# Four Critical Steps to Value Alignment

## 1 AWARENESS

What matters most? Start by looking in the mirror. Drill deep to separate what you were told to value from what you want and need to value now.

## 2 ALIGNMENT

Are your actions aligned with your values? This second step demands self-awareness and honesty. If you say X is most important, why are you spending your precious resources (time and money) on Y? To avoid becoming overwhelmed, start by aligning one aspect of your life and then move to another part.

## 3 ACCELERATION

How do your values guide your decision-making? When your values and actions are aligned, you can streamline decision-making.

## 4 ACCEPTANCE

Where and when should you accept some dissonance? Not everyone and everything will be aligned all the time. Constantly audit your values and actions to better understand why and when they are falling out of alignment. Identify recurring patterns to help prevent cognitive dissonance.

### Pro Tips

- ★ Value alignment is the journey, not the destination.
- ★ Break the process into small, actionable steps.
- ★ Cognitive dissonance occurs when we hold two or more contradictory beliefs, ideas, or values. When this happens, notice the tension.

## Case Study 2 | Overcoming Dissonance



G. felt profound dissonance with his organization and how they engaged and operated. Mounting frustrations were creating immense internal dissonance for him. He hated going to work, felt incongruent as a leader, and fantasized about leaving his leadership role altogether. After a particularly bad week, he devoted the weekend to a financial evaluation. He realized that he could walk away from his job and never work again. It would mean changes to his lifestyle, but the option was a real and legitimate choice. Assessing the financial outlook, he anticipated that within 11 to 13 months, or 18 months at most, there would be a liquidity event. Staying for 18 months would create intergenerational wealth. Placing a higher premium on providing for his family, he was able to keep engaging at work with less anger, dissonance, and greater results.

# Ideas Action

Values clarification is an interactive process. Below is an interactive activity designed to give you a jump start. The goal is greater clarity and congruence (not perfection).

## STEP 1 | AWARENESS | WHAT ARE YOUR VALUES?

- 1 Using the list of words below, check off the values that are important to you. Count how many you identified.
- 2 Next, refine your focus. Reviewing what you identified, underline 12 of the items you think are most important
- 3 Grab some Post-it notes. Write one word per Post-it note. Arrange the notes on a continuum (left: least important, right: most important) or sort into three categories: important, really important, and critically important. Reflect on your sorted notes and identify any missing elements. Share your findings with your inner circle for feedback and additional insights. Do they agree? Can they offer insights on what may be missing?

- |  |   |  |   |
|--|---|--|---|
| <input type="checkbox"/> Abundance       | <input type="checkbox"/> Grace          | <input type="checkbox"/> Efficiency    | <input type="checkbox"/> Control          |
| <input type="checkbox"/> Achievement     | <input type="checkbox"/> Gratitude      | <input type="checkbox"/> Empathy       | <input type="checkbox"/> Focus            |
| <input type="checkbox"/> Acknowledgment  | <input type="checkbox"/> Growth         | <input type="checkbox"/> Encouragement | <input type="checkbox"/> Confidence       |
| <input type="checkbox"/> Affection       | <input type="checkbox"/> Happiness      | <input type="checkbox"/> Endurance     | <input type="checkbox"/> Connection       |
| <input type="checkbox"/> Adaptability    | <input type="checkbox"/> Harmony        | <input type="checkbox"/> Energy        | <input type="checkbox"/> Consciousness    |
| <input type="checkbox"/> Agility         | <input type="checkbox"/> Health         | <input type="checkbox"/> Excellence    | <input type="checkbox"/> Consistency      |
| <input type="checkbox"/> Adventure       | <input type="checkbox"/> Helpfulness    | <input type="checkbox"/> Experience    | <input type="checkbox"/> Continuity       |
| <input type="checkbox"/> Affluence       | <input type="checkbox"/> Honesty        | <input type="checkbox"/> Fairness      | <input type="checkbox"/> Contribution     |
| <input type="checkbox"/> Alignment       | <input type="checkbox"/> Honor          | <input type="checkbox"/> Faith         | <input type="checkbox"/> Control          |
| <input type="checkbox"/> Balance         | <input type="checkbox"/> Hopefulness    | <input type="checkbox"/> Fame          | <input type="checkbox"/> Clarity          |
| <input type="checkbox"/> Beauty          | <input type="checkbox"/> Hospitality    | <input type="checkbox"/> Family        | <input type="checkbox"/> Cooperation      |
| <input type="checkbox"/> Excellence      | <input type="checkbox"/> Humility       | <input type="checkbox"/> Fashion       | <input type="checkbox"/> Creativity       |
| <input type="checkbox"/> Courage         | <input type="checkbox"/> Humor          | <input type="checkbox"/> Fearlessness  | <input type="checkbox"/> Credibility      |
| <input type="checkbox"/> Belonging       | <input type="checkbox"/> Imagination    | <input type="checkbox"/> Financial     | <input type="checkbox"/> Curiosity Daring |
| <input type="checkbox"/> Camaraderie     | <input type="checkbox"/> Impact         | <input type="checkbox"/> Independence  | <input type="checkbox"/> Decisiveness     |
| <input type="checkbox"/> Candor          | <input type="checkbox"/> Independence   | <input type="checkbox"/> Fitness       | <input type="checkbox"/> Dependability    |
| <input type="checkbox"/> Capability      | <input type="checkbox"/> Ingenuity      | <input type="checkbox"/> Flexibility   | <input type="checkbox"/> Depth            |
| <input type="checkbox"/> Certainty       | <input type="checkbox"/> Insightfulness | <input type="checkbox"/> Flow          | <input type="checkbox"/> Determination    |
| <input type="checkbox"/> Challenge       | <input type="checkbox"/> Inspiration    | <input type="checkbox"/> Focus         | <input type="checkbox"/> Directness       |
| <input type="checkbox"/> Charity/Service | <input type="checkbox"/> Integrity      | <input type="checkbox"/> Freedom       | <input type="checkbox"/> Discipline/Drive |
| <input type="checkbox"/> Cleanliness     | <input type="checkbox"/> Intelligence   | <input type="checkbox"/> Friendliness  | <input type="checkbox"/> Diversity/Duty   |
| <input type="checkbox"/> Closeness       | <input type="checkbox"/> Intimacy       | <input type="checkbox"/> Frugality     | <input type="checkbox"/> Education        |
| <input type="checkbox"/> Comfort         | <input type="checkbox"/> Intuitiveness  | <input type="checkbox"/> Fun           | <input type="checkbox"/> Effectiveness    |
| <input type="checkbox"/> Contribution    | <input type="checkbox"/> Joy            | <input type="checkbox"/> Generosity    |   |
| <input type="checkbox"/> Compassion      | <input type="checkbox"/> Justice        | <input type="checkbox"/> Gentility     |   |

- Kindness
- Knowledge
- Leadership
- Learning
- Liberty
- Logic
- Love
- Loyalty
- Mastery
- Mindfulness
- Modesty
- Motivation
- Open-mindedness
- Optimism
- Order
- Organization
- Passion
- Peace
- Perfection
- Perseverance
- Persistence
- Persuasiveness
- Philanthropy
- Playfulness
- Poise
- Popularity
- Power
- Pragmatism
- Precision
- Preparedness
- Presence
- Proactivity
- Professionalism
- Prosperity
- Punctuality
- Realism
- Reasonableness
- Recognition
- Reflection
- Reliability
- Religiousness
- Resolve
- Resourcefulness
- Respect
- Rigor
- Ritual
- Security
- Self-control
- Selflessness
- Self-reliance
- Sensitivity
- Serenity
- Service
- Simplicity
- Sincerity
- Skillfulness
- Solidarity
- Solitude
- Speed
- Spirituality
- Spontaneity
- Stability
- Stillness
- Success
- Teamwork
- Thankfulness
- Thoroughness
- Thoughtfulness
- Tidiness
- Timeliness Trust
- Truth
- Uniqueness
- Unity Vision
- Vitality Wealth
- Wisdom
- Wittiness

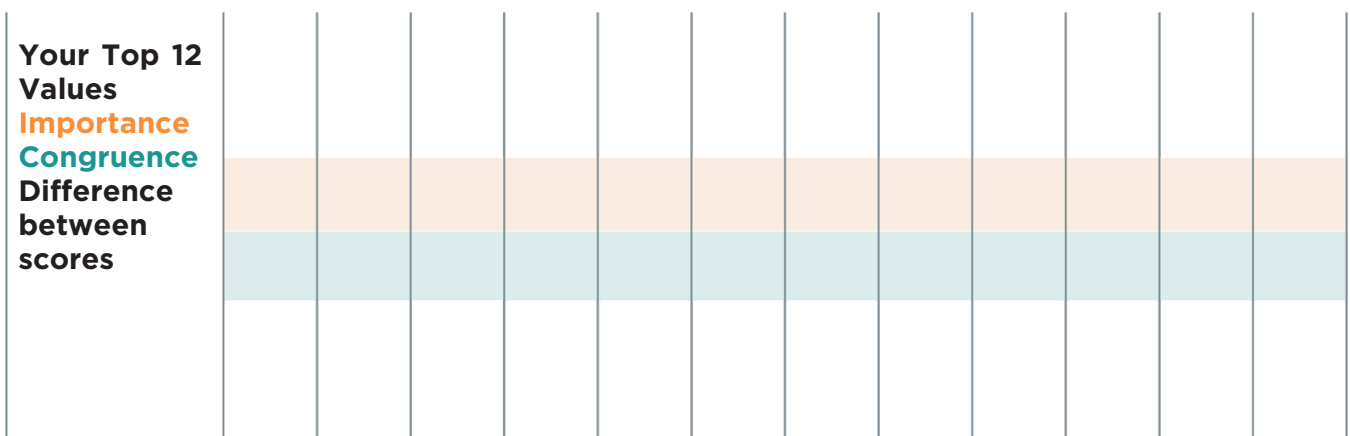


## STEP 2 | ALIGNMENT | WHAT ARE YOUR VALUES?

How is each value showing up in different domains of your life?  
Rate on a scale of 1 to 10.

**Importance:** How important are these values?

**Congruence:** How effectively are you already living these values?



\*Notice where the greatest differences are located. Ask yourself why this may be the case? What would you need to do to bring these things into alignment?



### **STEP 3 | ACCELERATION |** **HOW CAN YOU STREAMLINE YOUR DECISIONS THROUGH THIS LENS?**

#### **Examine the matrix above:**

What has become more clear?

What changes can you make to create alignment?

What shifts would simplify/streamline this process?

What changes are needed?

How might you allocate your time and energy differently?

What shifts would help you live your life fully aligned?



### **STEP 4 | ACCEPTANCE |** **HOW CAN YOU STREAMLINE YOUR DECISIONS THROUGH THIS LENS?**

We all value different things so misalignment is common. It is important to see this misalignment, name it, examine it, and resolve it. That said, sometimes it is okay to agree to disagree.

Again, consider Case Study 2. In this case, the client was experiencing misalignment at work, but upon reflection, he realized that living with this lack of alignment for just another 11 to 18 months would likely have a life-changing impact on his financial future.

His values were still out of sync with the values of this organization, but he now understood why he was temporarily living with this misalignment.

**Congrats on investing time and energy to clarify your values. In the “now,” this can feel hard. (You are doing great.) Think of this as an iterative process. Make it bad, make it better.**



## Awareness

- What are your values? What is clear? What could be more clear?
- How will clarifying values make you more effective? (Why do this?)
- Where do values impact your decisions?

## Accountability

- Share your values with people who you value. Seek out feedback on where you are living your values.
- Set up an accountability check-in on a daily/weekly/monthly basis to see where you are living in integrity.

## Activation

- Invest in clarifying your values.
- Work through the 4-step process.
- Notice which activities support your self- reflection and introspection (journaling, meditation, etc)...

## Integration/Acceleration

- Observe how having clear values makes you more effective.
- Understand where you need greater clarity.

## Agility Building

- Pressure test and “try on” your clarified values for 2 weeks.
- Apply them at work, at home, and in different settings. Are they congruent in different areas of your life?