1. IDENTIFY PERSONAL CORE VALUES

**Materials:** Core values list

**Objective:** To reveal or affirm your personal core values

**Process:** Review core values list and identify your personal core values – selecting those values that most resonate with you as a person (you can make flash cards from the core value list for each person involved in the exercise). Typically, a person is operating from/has no more than 5 core values at a time. This can be a powerful exercise for both you and your team members. Once you have identified your core values, review alignment of these values with your vision, life and priorities.

2. IDENTIFY AND DEFINE TEAM CORE VALUES

**Materials:** Core values list for each person, poster paper to tape on the wall

**Objective:** To identify the shared values of the team and together define what these values mean to you. **These will become a guide for identifying misalignments to the vision and for creating new alignments for growth of the team and practice in other exercises listed here.**

**Process:** Have each team member identify and record what they believe are the 5 shared, team core values. (This can be done individually prior to team meeting.) During the meeting – combine the values selected by each individual to form one collaborative group list (will likely contain more than 5 values) using poster paper. Then as a group, discuss the values to narrow the list to 5. Look to your vision and to times when you have been most in the flow as a team for guidance during this process. Once you have your 5 values determined, define what each value means to your team. Your definition could be the exact wording from the list, a dictionary definition OR your own unique definition.
3. CLAIM LEADERSHIP FROM YOUR VISION

**Materials:** A copy of your vision and defined team core values for every person

**Objective:** To claim your leadership pieces and responsibilities from the vision

**Process:** Making the practice vision very real to each person on the team is critical in ‘making the leap’ from an organization with a vision to a truly visionary organization (as described by Jim Collins). Give each team member the opportunity to review the team values, and then read the vision. Encourage team members to read the vision with a ‘beginner’s mind’ – that is a mind that sees possibilities (not limits) and many opportunities (not risks). Invite them to come up with 4 or more tangible ways they can bring the vision to life in their daily work. Consider adding these claims to the end of your vision to affirm their importance.

**A powerful way to begin a team meeting can be to read a sentence or two from the vision and have team members celebrate how they have fulfilled the vision in that way since the last team meeting.**

4. IDENTIFY AND CORRECT TEAM MISALIGNMENTS TO VALUES AND VISION

**Materials:** Poster paper to tape on the wall

**Objective:** To identify and correct team misalignments to values and vision

**Process:** Tape 3 large pieces of poster paper on the wall. Label them “What’s working,” ‘What’s Not Working,’ and ‘What Can We Improve.’ Using this framework is a great way to identify misalignments to your vision. As a group, identify areas of the practice, systems and operating procedures that fall into each category. Encourage the team to come up with as many ideas as possible for each list without getting off track for extensive elaboration about a certain idea. Let them know there will be a chance to discuss them later. For this exercise, you will use the ‘What’s Not Working,’ and ‘What Can We Improve,’ lists.

‘What’s Not Working’: Decide if each item on the list is something you need to let go of as a practice (this item is no longer serving you or your vision) or something that needs to be re-aligned to your vision and values. If re-alignment is needed – I would suggest creating a written system to achieve this during a dedicated team meeting for that process. You will walk away with a list of systems that will help you ‘make the leap!’

‘What Can We Improve’: Look to your values definitions and vision to guide you to areas of possible improvement for the items in this list. Have team members brainstorm (rapid-fire, as many things as they can think of in a specified amount of time) possible ways for improvement for each idea. Then, decide as a group how you will best use your energy and resources for improvement. Focus on ‘bang for your buck!’ What will get you the biggest
WOW, the most loyal patients, the most accepted treatment plans. Finally, establish an interval to re-evaluate how your strategy is working.

5. CREATE NEW ALIGNMENTS TO VALUES AND VISION

**Materials:** Use the ‘What’s Working,’ list described in the exercise above, poster paper to tape on the wall, and copies of defined values and vision statement

**Objective:** To create new alignments to values and vision – great examples of achievement of this objective are the WOW factors in a practice, or what Jim Collins calls, ‘mechanisms with teeth,’ *(how appropriate for a dental team!)* The things we do in our practices that give us the most results.

**Process:** Tape up your ‘What’s working,’ poster paper list from the exercise above. Ask team members to identify the core value behind the items on the list and learn more about why the specific items are working from your team members. CELEBRATE your wins. This exercise will help to fire up your positive, creative energy for the next step.

Next, tape up a blank piece of poster paper and invite the team to brainstorm a list of possible new alignments to the vision and values – these are things like WOW factors/mechanisms with teeth or new systems that could elevate your level of practice/realization of the vision (do it using rapid-fire brainstorming, as many things as they can think of in a specified amount of time). Then, as a group rank ideas in order of importance – put your best energy into your best ideas! Decide how you will use your energy and resources for improvement. Focus on ‘bang for your buck!’ What will get your team the biggest WOW, the most loyal patients, the most accepted treatment plans. Finally, establish an interval to re-evaluate how your strategy is working.

6. LISTEN FOR THE VALUES OF PATIENTS

**Materials:** Hot chocolate case study, questions listed below for hearing values

**Objective:** To learn how to listen for the values of patients

**Process:** Read the Hot Chocolate case study to your team. Discuss as a team how that article relates core values (they are sometimes hidden behind the “cup” we choose to live in) and how they can be difficult to discern without practice.

Next, ask your team members to answer 3-4 questions related to Hearing Values. Examples:

I take great pride in………..

I want to help others to………..

I want to be remembered for………..

My life would be more exciting if………..
I feel angry when………

After they have had time to complete a few questions, ask for a volunteer to read one question and answer aloud to the group. Listen for the core value operating in their answer and check in with them. For example, your team member could answer, “I want to be remembered for making a difference in the lives of other people.” You can check in with them about having the core value of altruism or serving others. The language I use for checking in is, “What I’m hearing is that serving others is really important to you. Is that right?” If you can’t hear the value in their answer, ask them to tell you more. It will usually become clear. Break your team into pairs and have them to alternate reading several questions and answers to each other and practice hearing the value behind the other’s answer/checking in to verify the value. Encourage your team to try this with patients! You try it, too! Identifying core values of our patients helps our role shift from one of ‘sales’ to one of support or advocacy for their values or their highest needs and wants for their life.
A group of graduates, well established in their careers, were talking at a reunion and decided to go visit their old university professor, now retired. During their visit, the conversation turned to complaints about stress in their work and lives. Offering his guests hot chocolate, the professor went into the kitchen and returned with a large pot of hot chocolate and an assortment of cups – porcelain, glass, crystal, some plain looking, some expensive, some exquisite – telling them to help themselves to the hot chocolate.

When they all had a cup of hot chocolate in hand, the professor said: ‘Notice that all the nice looking, expensive cups were taken, leaving behind the plain and cheap ones. While it is normal for you to want only the best for yourselves, that is the source of your distress. The cup that you’re drinking from adds nothing to the quality of the hot chocolate. In most cases it is just more expensive and in some cases even hides what we drink. What all of you really wanted was hot chocolate, not the cup; but you consciously went for the best cups…..and then you began eyeing each other’s cups.

Consider the story in this way: You are the hot chocolate; your job, money and position in society are the cups. They are just tools to hold and contain life. The cup you have does not define, nor change the quality of life you have. Sometimes, by concentrating only on the cup, we fail to enjoy the hot chocolate. The happiest and most fulfilled people don’t have the best cup, they just make the best of what they have and live in the center of what they believe. And they enjoy their hot chocolate.