



Core Values Worksheet



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Purpose: This worksheet helps agency owners define and refine their core values, providing space to detail how each value translates into specific behaviors and examples of how team members can embody these values in daily interactions.

Instructions:

1. Write down your agency's current core values, if any. If not, think about the principles that are most important to your agency.
2. For each value, describe what it means and why it's important to your agency.
3. List specific behaviors or actions that demonstrate this value in action.
4. Provide examples of how team members can embody this value in their roles.

Core Value #1

Core Value Name:

(Example: Compassion)

Description:

What does this core value mean to your agency?

(Example: Compassion means we always put ourselves in the client's shoes and respond to their needs with empathy.)

Behaviors that Demonstrate this Value:

Examples:

- Responding to client inquiries within 24 hours.
- Actively listening to client concerns before providing solutions.
- Prioritizing urgent client needs over routine tasks.



How Employees Embody this Value:

(Example: Team members are expected to show patience when dealing with difficult clients, take the time to fully understand their needs, and offer thoughtful, empathetic solutions.)

Core Value #2

Core Value Name:

(Example: Consistency)

Description:

(Example: Consistency means we deliver the same high level of service and communication every time, to every client, no matter the situation.)



Behaviors that Demonstrate this Value:

Examples:

- Delivering on promises made to clients.
- Responding to team emails in a timely manner.
- Following standardized processes for all client interactions to ensure quality.
(Examples provided. Add more as needed.)

How Employees Embody this Value:

(Example: Employees are expected to maintain consistent communication, adhere to established protocols, and ensure each client receives the same level of excellent service.)

Core Value #3

Core Value Name:

Description:



Behaviors that Demonstrate this Value:

How Employees Embody this Value:

Core Value #4

Core Value Name:

Description:



Behaviors that Demonstrate this Value:

How Employees Embody this Value:

Core Value #5

Core Value Name:

Description:



Behaviors that Demonstrate this Value:

How Employees Embody this Value:

Core Value #6

Core Value Name:

Description:

Behaviors that Demonstrate this Value:



How Employees Embody this Value:

