



Identifying Purpose and Creating Alignment Worksheets

Description

A clear sense of purpose for one's life and work is like having a compass to help navigate — it tells us when we are on or off track. When individuals and teams are clear about their fundamental purpose, and there is high degree of alignment with the larger team or organization, productivity and engagement soars. This is also true of vision and values.

Ideally there is strong alignment between an individual's mission, vision and values and those of the team or larger organization. When true, the employee is naturally motivated and committed to performing well, and productivity and engagement are high. On the other end of the spectrum are occasions when there is little or no overlap and it is in everyone's best interest that the person move on to a new assignment or move out of the organization.

Most commonly, there is at least some alignment and an opportunity to clarify and strengthen the degree of overlap. The *Identifying Purpose and Creating Alignment Worksheets* are designed to support individuals and teams in cultivating a clear sense of purpose, and on increasing awareness and exploring options to increase alignment. An underlying assumption is that the more congruence between what a person does (job assignment) and who a person is (mission, vision, values) the more they are motivated and committed, resulting in sustained high performance.

Instructions

1. Use the following *Individual/Team Purpose Worksheets* to create a purpose statement. Also use previous work done on areas such as Vision or Values.
2. Use the *Alignment Conversation Guide* to raise awareness of the degree of alignment between the individual and team or organization.
3. Explore options for increasing the overlap (alignment).
4. Develop a plan to make changes and act on those.
5. Re-assess every three to six months by drawing a new diagram.



Individual/Team Purpose Worksheets

1. Life Reflection

Take 20-30 minutes to reflect on the experiences that you have had over the course of your life, beginning with childhood, progressing through teen and you adult years, through adulthood to the present time. (For a team, reflect on the history of the team or department). In the space provided, record your notes on the experiences that were most important, key relationships, particular values that were important, and any overall themes from that period. Review your notes and in the last row write what you think was most fulfilling for you in that time.

	Childhood	Teen/Young Adult	Adulthood	Senior Adult
Key Events				
Relationships				
Values				
Themes				
What was most fulfilling?				



2. Talent, Fulfillment & Need Model

A. Use the table below to answer these questions:

- What are the tasks or activities in which I have high aptitude, talent, or skill? In other words, what am I best at?
- What are the tasks or activities that bring me the greatest fulfillment or satisfaction? In other words, what are the things that I love to do the most?
- What are the tasks or activities that are most in need of doing? In other words, what are the things that my organization or community most needs from me?

Most Talented	Most Fulfilling	Most Needed



2. Talent, Fulfillment & Need Model, continued

- B. Next, identify the types of activities that are the most similar between these three areas. Where is the intersection? What are the activities in which you have aptitude or talent, which bring you fulfillment, and which are needed by the organization or community?



Areas of Overlap

- C. Write a statement below describing what it is that you are here to do, and the impact that you want to have. (*Example: My purpose is create innovative change in organizations by catalyzing "out of the box" thinking and being a lightening rod for creative brainstorming.*)

My purpose is:



Alignment Conversation Guide

The purpose of an alignment conversation is to raise awareness of where the purpose, vision, and/or values of an individual (or team) is highly aligned (or unaligned) with those of the larger organization. By becoming more aware of the degree of alignment, it creates the possibility for change — either for exploring ways to strengthen alignment, or recognize that there is little alignment and lack of a good fit.

The focus can be on purpose, vision, or values; and can focus on alignment between: employee and organization, team and organization, employee and particular job, and so forth.

Follow this suggested process:

1. Gather the individual's (or team's) purpose, vision, and values and the organization's purpose, vision and values.
2. Direct the individual (or team) to compare the two lists and identify where he/she feels well aligned with the organization, job assignment, and culture.
3. Then, talk about where he/she does is not well aligned to the organization, job assignment, and culture.
4. Have the individual (or team) represent their situation graphically. It may be just two circles representing the degree of alignment between themselves and a composite of organization/job/culture. In the diagram, more overlap represents more alignment. Alternatively, it may work best to attend to the person and their relationship to one component at a time. Realistically, there is always some gap between the professed mission, vision, and values or an organization with those actually in practice every day. Also, it may be that the person feels well aligned to the company but marginally aligned to the job requirements, for example.
5. The previous step characterizes the current state. Next, have the person draw another diagram to represent the ideal state. As in using the coaching roadmap, prompt them with questions to articulate details of the ideal.
6. Move the conversation to what needs to happen, if anything, to better align what they are doing to who they are.
7. Conclude with planning, action, and accountability.

Sample Diagram — Current State

The following illustrates how someone might depict their "current state."

