



## THE CEO OF YOU®

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### Core Values Workbook

Find Your Unique ID

*Core values are traits or qualities that represent an individual's or an organization's highest priorities, deeply held beliefs, and core, fundamental driving forces. They are at the heart of what you; your practice and its employees stand for in the world.*

Dr. Laretta Justin  
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THE CEO OF YOU®: Core Values Workbook

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### The Story of Zappos

In 1999, Nick Swinmurn wanted a pair of Airwalk Desert Chuka boots. Unable to find them at his local San Francisco mall, he had the idea to sell a wide variety of footwear online, under the name shoesite.com.

Swinmurn met with Fred Mossler, a men's shoe buyer at Nordstrom, and asked him to join his start-up. Mossler, however, wanted Nick to have more capital before he committed. Nick then met with Venture Frogs, Tony Hsieh's investment company. Seeing the vision and potential, Hsieh bought into the idea and eventually became co-CEO with Swinmurn.

Searching for a more unique name soon thereafter, Shoesite became Zappos, an adaptation of zapatos, the Spanish word for shoes.<sup>1</sup>

While the company does sell shoes and other retail goods, it's not what it sells that makes Zappos successful. It's how it sells (that is, how it integrates its Core Values in everything) that makes Zappos what it is today. The company has revenues in excess of \$2 billion annually, and in 2009 Amazon acquired Zappos for around \$1 billion.

### The Key to Zappos' Success

If you hear anything about Zappos from a Zappos customer, chances are it will be positive. There are dozens of stories about their outstanding customer service, including delivering flowers to a customer whose mom passed away and talking to a customer for over 8 hours (a record that now has been broken).<sup>2</sup>

This amazing customer service is not by accident. It's a direct result of the company's Core Values. Zappos has 10 fundamental Core Values. To them, these values are more than just words; they're a way of life.

In January 2005, Zappos polled employees on what they thought the company's core values should be. Hundreds of ideals were submitted, which resulted in 37 foundational themes. This list was further narrowed down, and on February 14, 2006, the Core Values were introduced.

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<sup>1</sup> (Christoffersen, 2019)

<sup>2</sup> (Bulygo)

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### **Zappos Family Core Values**

These are the ten core values that we live by:

1. Deliver **WOW** Through Service
2. Embrace and Drive **Change**
3. Create **Fun** and A Little Weirdness
4. Be Adventurous, Creative, and **Open-Minded**
5. Pursue Growth and **Learning**
6. Build Open and **Honest Relationships** With Communication
7. Build a Positive Team and **Family Spirit**
8. Do **More** With Less
9. Be **Passionate** and Determined
10. Be **Humble**

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Besides being distinctive, these Core Values create a framework for Zappos' actions. These values guide everything they do, including how they interact with employees, customers and community, vendors and business partners.

In his book, *Delivering Happiness*, Tony talks about the exceptional customer service that Zappos offers to its customers. Customer Service is priority in the company and everyone in the company knows that. He details experience where customers have been “wowed” by the way their transactions were handled and as such they kept coming back.

Tony encourages his customer service representatives to direct Zappos customers to whosoever has a product that the customer is looking for, whenever Zappos does not have the product. Tony believes that the mantra should be service and not sales at all times.

To illustrate this point, in the book, he tells a story of someone calling Zappos for the nearest Pizza restaurant. The person was given the direction despite the fact that this is way off the radar for Zappos as a business.<sup>4</sup>

As evident in Zappos' success, having **clear values** will help you ensure that all your employees are working towards the same goals. These values will support your company's vision and shape its culture. If every single business decision is aligned with these values, you will experience similar success.

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<sup>3</sup> (Christoffersen, 2019)

<sup>4</sup> (Hsieh, 2010)

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A business without core values had no foundation. How can you build great teams, deliver an excellent patient experience and foster innovation if you haven't defined and shared your **practice's values** with your employees?

*“Your personal core values define who you are, and a company's core values ultimately define the company's character and brand. For individuals, character is destiny. For organizations, culture is destiny.” –Tony Hsieh*

Many other companies have their own values that align their employees. Some make their values public, some don't. Here are some companies that share their values:

- American Heart Association's values - <https://www.heart.org/en/about-us/statements-and-policies/american-heart-association-ethics-policy-details>
- Coca Cola's core values - <https://cocacolaunited.com/core-values/>
- Facebook's five values - <https://www.facebook.com/careers/>
- Google's values (aka ten things we know to be true) - <https://www.google.com/about/philosophy.html>
- Marriott's core values - <https://www.marriott.com/culture-and-values/core-values.mi>

### What are core values?

Core values are traits or qualities that you consider not just worthwhile, they represent an individual's or an organization's highest priorities, deeply held beliefs, and core, fundamental driving forces. They are at the heart of what you; your practice and its employees stand for in the world.

Most people coast through life without any kind of consideration for what is truly important to them. This means that unfortunately for many, life is something that 'just happens' to them. Even though, they are making hundreds of decisions every day; those decisions aren't directed towards any specific purpose.

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### Why are core values important?

They help us identify our priorities and guide our decisions, intentions and behaviors. Your Core Values dictate the choices you make and determine the direction that your life takes.

Yet despite this importance, few people choose their values. Instead, they simply adopt the values of their parents and/or the dominant values of peers and society. In all likelihood, the values that you internalized as a child remain with you through adulthood.

Unfortunately, these values may also have created a life that is carrying you down a path that is not the direction you want to go.

What values were you raised with? What values are you presently living in accordance with? Are they the same or different? Do your values bring you success and happiness in your professional and personal life? These are essential questions that you must ask if you are to find happiness, success in your life.

### 5 Benefits of defining your Core Values for your practice

1. **They communicate what is important.** Understanding a company's principles can help make choices easier to make. For example, if making high-quality eyewear is a core value, you will attract patients with similar values and won't have to compete on price.
2. **They give your practice a Unique ID.** A company that understands what it cares about can show how it is unique. When patients, potential customers, and workers all know what a practice stands for, it increases its value in the marketplace.
3. **They help you build a great team.** Employees often want to work at organizations whose core values align with their own. When companies clearly outline their core values, it makes it easier to attract like-minded people who fit in with the company culture; this leads to happy employees and customers.
4. **They influence overall behavior.** When company values are defined and enforced, it can inspire workers to hold themselves to a higher standard. It also makes employee performance reviews a matter of living up to those values, rather than a personal attack.
5. **They contribute to the overall success of the organization.** Ideally, core values are never compromised. Whatever cultural standards a practice sets for itself, it should hold them well — and firmly. Doing so leads to better outcomes in

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marketing, human resources, and patient care. These elements, of course, contribute to a practice's overall success. <sup>5</sup>

Understanding the benefits of having core values isn't enough, however. To truly benefit from them, effective practices must be set in place. The first step in that process is to identify them for yourself and your business.

### How to identify your core values

**Step 1:** Identify and write down six people who are important role models or valued connections for you.

**Step 2:** Think of the values they embody. For example, your list might include: "my grandfather for his acceptance and love," "my husband for his kindness," "my colleague for his listening skills," and "my friend for her loyalty," to name a few. These values you admire in those role models are clues to what's important to you.

Practice Opportunity: List 6 important role models below and values they embody.

Role Model	Value they embody

Do you see a pattern in those values in your life?

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**Step 3:** Keep a journal. As you journal about your day to day experiences, you'll start noticing patterns. These patterns of feelings, decisions and behaviors will help you identify some of the values that guide your day to day living.

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<sup>5</sup> (Lesley University)

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Practice Opportunity: Think about the past 3 days. Use the space provided below to write 3 journal entries. As you look over those 3 days, what values guided the decisions you made? What about behaviors? Can you identify any patterns?

Day 1 - Date:	

Day 2 - Date:	

Day 3 - Date:	

**Step 4:** Think about some of the peak and low experiences in your life. For example, if you felt a lot of pain in the past after the betrayal of a friend, loyalty might be an important value for you. Or, if you were voted most likely to succeed in high school, achievements may be important for you. These moments could direct you to what you care about most.

Practice Opportunity: Use the space provided below and write about one peak experience and one low experience from your life. What values do these experiences exhibit? Can you see any patterns?

Peak Experience	Values	Low Experience

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**Step 5:** Use a values inventory. You can find various values inventories online. A values inventory is available below.

### Core Values Inventory

**Instruction:**

1. Circle up to 25 words from the list below that are important to you. You can also add some of your own to the list.

Achievement	Excitement	Leadership	Security
Accountability	Expertise	Learning	Service
Altruism	Fairness	Love	Self-Respect
Authority	Family	Loyalty	Status
Balance	Freedom	Money	Success
Boldness	Friendships	Nature	Teamwork
Commitment	Fun	Order	Trustworthiness
Community	Growth	Ownership	Truth
Competence	Hard Work	Passion	Wealth
Competition	Honesty	Philanthropy	Wisdom
Control	Humility	Power	Working alone
Cooperation	Humor	Privacy	Winning
Courage	Independence	Profit	_____
Creativity	Influencing	Promotion	_____
Discipline	Innovation	Public Service	_____
Diversity	Integrity	Quality	_____
Empower	Justice	Recognition	_____
Excellence	Knowledge	Result Oriented	_____

2. Sort and group together the values that have similar meanings into the 5 sections below.

Group 1	Group 2	Group 3	Group 4	Group 5

3. Look over the words in each group above and choose one that you feel encompasses the meaning of the entire group. Write that word in the sections below as the core value each group.

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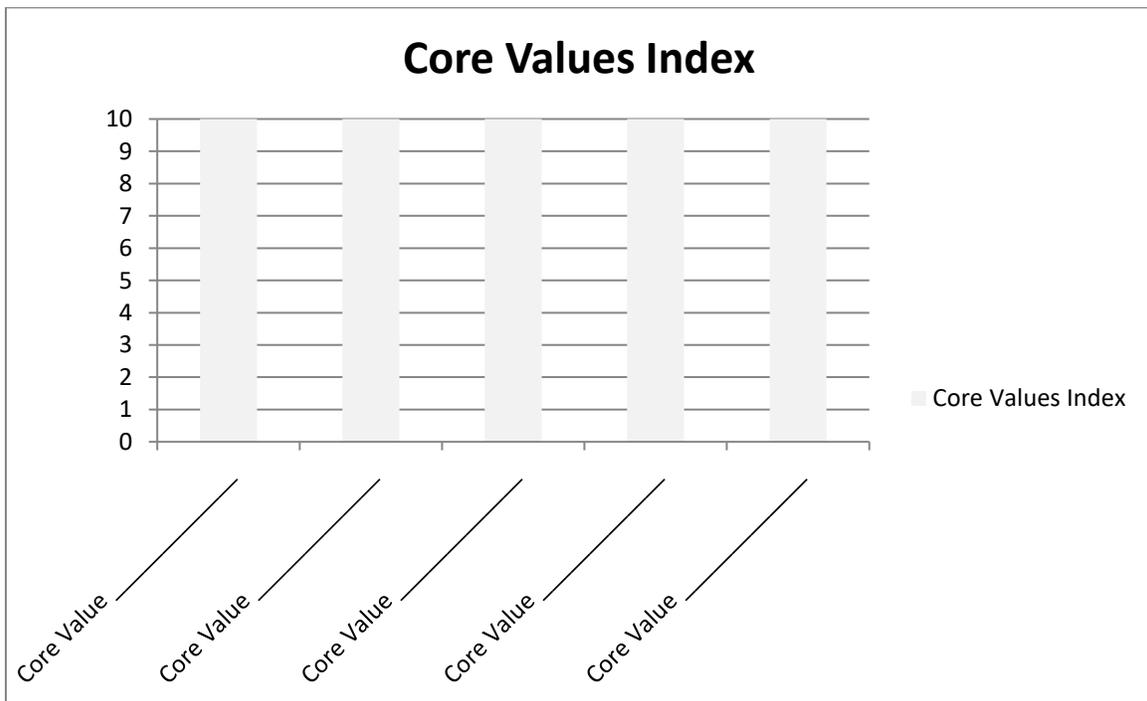
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Core Value for Group 1	Core Value for Group 2	Core Value for Group 3	Core Value for group 4	Core Value for group 5

4. Words have different meaning to different people. That is why in this next step, you need to define what each value mean to you.

Core Value	How you define it

5. Label the Core Value Index below with your top 5 core values.



6. For each value, start at the bottom of the graph and color towards the top. On a scale of 1-10, where 1 no importance, and 10 means extremely important; Color in how important that value is to you.

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7. Once you've colored each bar, you'll have created your very own core value index.
  - a. An evenly distributed graph may indicate that you don't have any priorities in your values. This could create an out-of-balanced feeling in your life. Go back and prioritize each value.
  - b. Whereas a bumpy graph indicates priorities. Make sure that the priorities are in the correct order, if so congratulations you are living according to your core values. If not, do the graph again, but this time put the values in the order of priority you desire.
8. Write down 3 things that you're going to do differently as a result of this experience, to bring your day-to-day activities into alignment with your most important core value?
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_

### How to hold your team accountable to practice core values

Once you have identified your core values, the next step is to have a plan to hold everyone involved accountable to those values.

Building accountability into core values, offering practical training on what it means and looks like (with examples and scenarios) and transparently reporting out about progress or challenges is the best way to hold your people accountable. Here are 5 tips on how you can implement that accountability system in your practice.

#### 1. Put the words in writing.

Add them to your website, social media platforms, email signature, newsletters, the bottom of your presentations, ect. It may feel forced at first, but as you get into the habit, you will find yourself using your value words easily in your everyday life.

#### 2. Review your hiring process.

Take special notice how these values are shown throughout the posting. Use these words in your job postings with a direct line to how the job fits into those values.

Add questions that will both share with the candidate that these are your values and allow you to determine if the candidate shares these values.

Examples:

Integrity value-based questions

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- Please define “integrity.” What does it mean to you in the workplace?
- Have you ever been put in a situation where doing the right thing would make you look bad? Tell me about how you handled it.
- If you saw a coworker doing something that would hurt the company, what would you do? Has this ever happened to you? Please explain.
- If you knew your manager was doing something unethical, how would you handle it?
- What would you do if you were asked to do something that went against your values?

### Accountability questions

- Have you ever had to juggle more projects than you had time for? How did you prioritize?
- Tell me about a time when you had to pass your work onto a coworker because you couldn't meet deadlines. What did you learn from the experience?
- Describe a time when you were late for an important meeting. What happened?
- Tell me about a time when a coworker's work was passed onto you. Were you able to get the work done? What was your reaction to the situation?
- If you made a mistake that could cost you your job and nobody knew it was you, what would you do?

### 3. Apply the values to your daily life.

Are you emulating the values you profess to share? If Trust is one of your values, are you trustworthy? Are you extending trust to others? This is probably the most difficult part. As a leader, you need to lead by example because how you live is a testimony of the Core Values you are hoping to impart to your employees.

### 4. Talk about the values at employee meetings.

You've already added them to your presentation template, but take time to explain to your employees why you decided that these are your values. If you don't already have a regular all staff meeting, plan one to discuss those values.

### 5. Have patience.

Not everyone will get on board with your values, and some may not believe that you believe in them. You need to have a consistent, constant message of these values. Changes will not happen overnight, but it will slowly sink in as you promote and reinforce your values over time. Don't give up if it doesn't seem to be working at first, have patience and keep working at it until the results start showing.

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### The Plan

Use the spaces below as a guide to help you put your plan together. You do not have to fill -in each blank space or answer each question. Do as much as you can and that will be enough.

Your Name: \_\_\_\_\_ Date: \_\_\_\_\_

Practice Name: \_\_\_\_\_

**Core Value #1:** \_\_\_\_\_

Value Definition: \_\_\_\_\_  
\_\_\_\_\_

Value –Based Question(s): These questions can be used to assess compatibility with anyone you want to bring into your life, employees, partners and/or friends, ect.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How will you integrate this value in your daily life at home and/or at work?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How will you communicate this value to the people in your life at home and/or at work?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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How will everyone involved be held accountable?

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**Core Value #2:** \_\_\_\_\_

Value Definition: \_\_\_\_\_  
\_\_\_\_\_

Value –Based Question(s): These questions can be used to assess compatibility with anyone you want to bring into your life, employees, partners and/or friends, ect.

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How will you integrate this value in your daily life at home and/or at work?

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How will you communicate this value to the people in your life at home and/or at work?

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How will everyone involved be held accountable?

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**Core Value #3:** \_\_\_\_\_

Value Definition: \_\_\_\_\_  
\_\_\_\_\_

Value –Based Question(s): These questions can be used to assess compatibility with anyone you want to bring into your life, employees, partners and/or friends, ect.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How will you integrate this value in your daily life at home and/or at work?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How will you communicate this value to the people in your life at home and/or at work?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How will everyone involved be held accountable?

\_\_\_\_\_

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**Core Value #4:** \_\_\_\_\_

Value Definition: \_\_\_\_\_  
\_\_\_\_\_

Value –Based Question(s): These questions can be used to assess compatibility with anyone you want to bring into your life, employees, partners and/or friends, ect.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How will you integrate this value in your daily life at home and/or at work?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How will you communicate this value to the people in your life at home and/or at work?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How will everyone involved be held accountable?

\_\_\_\_\_  
\_\_\_\_\_

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**Core Value #5:** \_\_\_\_\_

Value Definition: \_\_\_\_\_  
\_\_\_\_\_

Value –Based Question(s): These questions can be used to assess compatibility with anyone you want to bring into your life, employees, partners and/or friends, ect.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How will you integrate this value in your daily life at home and/or at work?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How will you communicate this value to the people in your life at home and/or at work?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How will everyone involved be held accountable?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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### Paired Partner Activity Instructions:

Now that you've completed the activities above, it's time to put your plan together. If you are taking this course as part of our workshops, you'll be assigned a partner to help you put your plan together. If you are taking the course on your own, and need a partner, visit our website, [OptometryDivas.com](http://OptometryDivas.com) to contact us with your request.

When you meet your partner, you should do the following:

1. Share your experience with your partner.
2. Share your top 5 Core Values with your partner and ask for feedback. For example, are the value definitions clear and succinct?
3. Share your plan to integrate these Core Values into your life and your practice with your partner and ask for feedback.
4. Give feedback to your partner on their plan.
5. **Only for those taking this course as part of the workshop** – Come prepared to present your partner's experiences, core values and plan in our wrap-up session.

### Final Thoughts

Your core practice values will shape your practice culture and impact your business strategy. They will help you create a purpose, improve team cohesion, and create a sense of commitment in the workplace.

However, having practice values doesn't mean having a polished communication plan around nice values and principles.

You have to truly honor your practice values in everything you do and set the right example for your employees. It's the only way you can build trust in the workplace. Don't ask your employees to follow the practice values you've set for your practice if you don't follow and integrate them into your daily work in the first place.

Your practice values are your practice's DNA and they help you differentiate your business from the competition. If you take the time and create those values, communicate them and integrate them into your daily work life, like Zappos, you too will experience enormous success.

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We love to hear your stories, please share your progress with us on our Facebook group at <https://www.facebook.com/groups/OptometryDivas>. See you there!

Until then, remember to continue to Empower, Connect, and Promote each other's success.

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