

Develop Vision and Values Congruence

I was about fourteen years old when I found myself in a fistfight. It wasn't my idea but, at the time, it seemed like an appropriate response although it was with one of my best friends. In any case it taught me something about values.

The fight probably lasted about forty-five seconds. I was thinner then, so my dazzling foot speed didn't allow my friend to land a punch. I took a couple of swings. One of them actually hit something, because I noticed after the fight that my friend's nose was bleeding. It wasn't very bad but, of course, I was sorry that it had happened.

Because the fight happened at the end of our block, my mother found out about it. I was sent to my room and was told to think about why the fight had happened and why it shouldn't happen again. I guess I didn't have any homework that afternoon because I actually thought about it.

Although I had been very competitive in sports, drama, and public speaking, I was typically collaborative in working with other kids. I valued harmony. I realized that my friend always seemed to be looking for a fight. He and I hadn't had one before that because we were such close friends and he was always busy fighting with other kids. As I

thought about what had happened, I realized that not only was my friend disharmonious, he also didn't believe in a superior being or have a sense of spirituality. His approach in dealing with others was not what I called honest. These were some of the differences that I noted as I thought about what had happened that afternoon. It was then that I realized that people liked different things and behaved in different ways. This was my first encounter with something called *values discrepancy*. It seemed very odd to me. I wondered why there wasn't greater agreement.

The Importance of Vision and Values Congruence

The participants in my studies have looked at this from different perspectives. First, they speak in terms of how important vision and values congruence is. It is probably the easiest congruence to obtain. Second, they speak about congruence between an organization's vision and a person's individual vision, which is important to motivation. The final way in which they think about such congruence is between the values that an individual holds and the values that an organization holds.

Many people believe that the idea of vision and values as leadership tools is new. However, you can go back centuries and see examples of how vision and values, when aligned, are strong motivating forces. One example is the early Roman Empire. Every Roman knew what Rome stood for and what behaviors were expected of Roman citizens. Southwest Airlines is a perfect example of how vision and values drive

business success, as is Apple Computer's imagination about the future (vision) and new-product launches by committed employees (values). Vision and values have become major forces in successful business and governmental organizations in the 21st Century.

Developing Organizational Vision and Mission Statements

Organizations and individuals have visions of the future that drive their behaviors, whether they realize it or not. An organization may have a vision statement or a mission statement or both. Usually these are written and may appear on the organization's web site, advertising materials, and/or business cards. I've seen vision and mission statements on posters in employee lounges and on employee bulletin boards.

In some organizations, neither has been written down nor expressed in a formal manner. In such organizations, it may be clear that there is a vision or mission that is driving the organization, but the leaders of the organization have inadvertently or purposely chosen not to have the vision or mission on display. In such cases, the employees do not have a sense of what the overall purpose of the organization is (other than to make money). Studies reported by the Drucker Foundation have shown that people need reasons for their work, and the more value they see in their work, the more motivated they are. When the vision and mission are articulated, the work force is more focused. The vision and mission provide goals and a focus for energy that leads to better task performance.

Organizational visions usually are based on the answer to the question, "What do we want to be?" Organizational leaders normally

identify the vision and mission during a strategic planning process, but they can be identified in other ways. In one organization, the vision statement may be developed in a shared fashion with groups of employees. In another organization, the vision and mission may be established by the chief operating officer, board chairperson, or a high-level management or policy-making group. Each statement usually is not more than a few sentences, but it should be clear about where the organization wants to focus its efforts.

Identifying Organizational Values

Once an organization's leaders are clear about what its vision is and what its mission is, they must identify categories of thoughts and behaviors they believe will make the vision and mission a reality. The broad categories of what people believe in and then express in their behaviors are often referred to as *values*.

In the early 1970s, when I was involved in the values-clarification movement with Dr. Sidney B. Simon, it was very clear to me that it was easy to know exactly what a value is. A value is defined as a force that a person or an organization is willing to act on over and over again in a consistent way after having considered alternatives and consequences for every possible "behavior." That definition is reinforced in the conversations that my students have with me and with one another.

An organization's values support its vision, so organizations usually espouse values that are consistent with their visions. Popular business magazines and journals publish articles saying how important

values congruence is and the effect it can have on business results. There are many examples in the business literature of organizational vision and value statements, and anybody can review them to identify the congruence or lack of it.

However, it is possible for an organization to reflect values that are not consistent with its vision. The incongruence usually leads to destructive forces overtaking the organization, causing it to either function poorly or fail. This was certainly the case with WorldCom. At first, this company was driven to be the best in its industry. Employees believed in the company and what it stood for, but its leaders let them down. They acted in ways that were contrary to the values, and their greed began to eat away at the core values. The contradictions overcame the company's goal of being the best.

At different points in time, an organization or an individual may choose to emphasize certain values over others. There can be more or less emphasis placed on certain things. For example, at one point American Express had six stated values. Its leaders decided that two more values were very important, so it added those two to its official values statement. In 2004, the Florida Department of Transportation had five stated values and then deleted one. Since then, it has emphasized the remaining four values in its history and development.

Organizational Vision and Personal Vision

Individuals also have motivating visions, many of which are personal. These address what the individuals want to get out of life and how they

expect to carry out their lives. It is important to have a personal vision because it gives meaning to life; it directs behavior and mobilizes energy. One personal vision is about what work ought to be like. This is framed over time, based on early experiences, so by the time a person has attained work maturity, the personal vision is pretty clear. However, such a vision can change. For example, a vision might change based on an extremely positive or negative emotional experience at work. This could be something such as a massive layoff or a job change that required the person to move from one end of the country to another.

What is most important about an individual's vision is that it be totally meaningful, based on where the person is in life, what he or she wants to do and/or attain, and how he or she wants to get there. Furthermore, if people are to be contented (or even effective) in their work, it is important that their personal visions of what work should be are congruent with the visions of their organization. In other words, the organization's vision and the person's vision of work need to be aligned. In order to maximize such things as productivity, quality, and service, it is important for the person's vision and the organization's vision to be maximally aligned. As alignment increases, all else being equal, we are most likely to see more positive results. These results are what the individual and the organization desire.

Organizational Values and Personal Values

Values congruence is a derivative of vision congruence in many ways and, on the other hand, values support and enhance the vision.

Organizational values and individual values are separate things that may change over time. But if a person remains with an organization, there usually is a set of shared values. When an individual's and an organization's values are congruent, there is an excitement or energy generated for the individual. The organization generates as much excitement and/or energy in its employees as it does values congruence. When employees perceive that they and the organization stand for the same things, they have deep feelings for things such as loyalty, integrity, teamwork, and service—or whatever the organization's values are. This is why it is very important for an organization to seek employees (especially in the higher levels) who have the same values as the organization.

Ways To Enhance Values Congruence

Many organizations make every effort to hire people who share their values. When this happens successfully, an organization creates a situation in which greater results for the individuals and the organization can be commonplace. Of course, sometimes it is difficult to determine just what a prospective employee believes in. It also can be difficult for an organization to keep individual and organizational values in alignment, because the organization's values can change and an individual's values can change.

An organization can choose to do nothing and hope for the best or it can take the opportunity to enhance and create greater values congruence as often as possible by using various approaches. These approaches include specific strategies and tools that organizations can use.

Behavioral Interviewing

Hiring people who hold values that are aligned with the values of the organization can be helped by the use of behavioral-interviewing techniques. This approach is based on asking questions about 1) previous, successful work behaviors and 2) how the candidate might behave in situations in the new job. The interviewer must be clear about what the prospective employee's job content would be and how it relates to each of the organization's values. He or she can then ask questions that are designed to elicit information about how the employee would be likely to act on the job in specific situations and then evaluate the responses in relation to the organization's values. For example, the interviewer might say, "Describe a time in your current job that required you to be a successful team player," or "What have you done to satisfy a very upset customer?"

Communicating the Values Repeatedly to Employees

Organizations should communicate their values and the behavioral expectations that go along with those values to their employees. It is important that this first be done during new-employee orientation programs. It also must be done on a continuing basis. Values can be communicated through staff meetings, the company newsletter, bulletin boards, the company website, the back of business cards, during performance appraisals, and through company-sponsored training programs that leaders and employees attend.

When I did executive-development training for a company a few years ago, the executives wanted to make sure that all the content in the training program was related to one of the organization's values.

It is important to note that some sets of values also can be communicated through training programs that employees attend that are not sponsored by the organization, such as those presented through training organizations and in different parts of the country and the world. Some of these may conflict with the organization's values. This may or may not be a good thing. It can be good if the returning employees feel free to discuss them so that the "new" values can be examined. If they are deemed worthy of adoption by the organization, it can take appropriate steps to integrate the new values into the organizational culture.

In the old days, people sat around a fire and told stories. Today, we tell stories everywhere. Storytelling is a very valuable tool, not just for education but also for providing examples of employee actions that are congruent with the organization's values. My students believe that hearing organizational stories enhances their understanding of the organization's values and expectations. They often talk about using a story at the beginning of a meeting to illustrate how a particular employee supported a value in a special way.

Walking the Talk

The most important way to communicate values is to live them—what is called "walking the talk." Leaders in organizations

must learn the values and the accompanying behavioral expectations and must make them clear in their dealings with all employees. “This is what we expect from people” must be modeled in the leaders’ behaviors.

Teaching Leaders

As experience over the centuries has proved, one of the most important responsibilities of leaders is to teach other leaders. However, how to do it well may not be as clear as the fact that it needs to be done. Leadership-development specialists, consultants, and executives all have tried a wide variety of approaches to teaching leadership. My students believe that the best way to teach leadership is through example. Leaders need to behave in ways that they expect the next generation of leaders to behave and they need to explain why they behave that way.

Reinforcing Standards and Expectations

Another way to enhance values congruence is by establishing consequences of behavior so that standards and expectations are enforced. This means using positive and negative reinforcement. This requires diligent effort on the part of leaders. They need to continually be in touch with employees and observe them carefully. Such observation will enable leaders to deliver the appropriate rewards or negative reinforcement based on the exact behavior of individual employees.

Allocating Resources To Support the Values

An organization's values are enhanced when the allocation of resources is consistent with the values of the organization. For example, if customer satisfaction is important, the organization needs to make resources available to people so that they can provide customers with positive experiences. If an organization says that its human resources are valuable, the organization must spend the money needed to retain outstanding employees. If an organization feels that quality of products and services is a key to its strategy for success, it must provide the resources to create and deliver quality products and services. In order to enhance values congruence, it is essential to allocate the resources needed to support the organization's values.

Periodically Assessing the Organization

Another important way to enhance organizational values is to conduct a periodic evaluation of the organization's values. For example, it was not that long ago that lists of corporate values did not include such things as racial equality, diversity, team building, encouraging employees to see how their work makes a contribution, innovation, learning from mistakes, strategic planning, and an emphasis on customer service. Many organizations emphasize these things now. The point is that the values that organizations choose to emphasize can change.

Just as organizations need to do periodic evaluations, individuals may be doing something similar. I remember waking up one morning

and realizing that my personal values had changed and that they were a lot different from the values that the organization I worked for espoused. It was natural for me to decide to leave the organization. The important point is to evaluate whether the currently stated values are what the organization actually wants to emphasize and what the individual wants to emphasize.

It is difficult to overemphasize the importance of being consistent as a way to enhance values. There are many opportunities to behave in accordance with values, and there also are situations in which employees may be lured into behaviors that are contrary to the values of the organization. Organizations and individuals must resist efforts and temptations that would have them behave in ways that are inconsistent with their stated values.

Conclusion

There are many people who believe that it is important to be passionate about what you do, where you do it, why you do it, when you do it, and with whom you do it. However, there may be something even more important—something deeper. As an analogy, the deeper place inside a human is in the bone marrow. The head, the heart, and the body all depend on the bone marrow. Congruence between vision and values is like bone marrow in enabling successful leadership.

Personal Assessment of Vision and Values Congruence

Questions for Reflection

1. Have the vision and values of the organization been communicated to all employees?
2. To what extent do you think the values support the vision?
3. What actions do leaders take in your organization to reinforce the values?
4. What role do you need to play in developing vision and values congruence?

Personal Actions

1. Description of what you did:
2. Were any resources required?
3. How were you able to sustain the effort?
4. Description of how people reacted:
5. What about the people who did not react?
6. How creative were you?
7. Quantitative assessment of what you did: What was the impact?
8. How did you know what the impact was?
9. Ways to spread this best practice:

10. What is the possible long-term impact?

11. What is the payback to you?