

Core Visions & Purposes

Understanding how you impact your firm





Who are we?

- From GH&I
...Top 10 Atlanta CPA Firm
- To Accountable for Change
...building better businesses



A strategic business advisory

Core Values

Core values should drive you as a business or leader. They become a filter for key decisions across the board.



Zappos



“If you had three votes what would be your top 3 core values?”

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

NAPLIA

Act with Integrity

Represent our company in an honest and trustworthy manner to build and establish strong relationships with our clients, consultants, business partners and the community.

Be Grateful for our Clients

Our clients are the sole reason for our success, and we are truly grateful for each and every one of them.

Be Humble

Recognize there are a number of outside factors that contribute to our success.

Have Fun

If you enjoy what you do (and we do) it's hard to consider it work.

Be Yourself

We do not operate with scripts. Everyone is an individual and is encouraged to be.

Commitment to Self-Improvement

Always work to improve your industry knowledge to the benefit of our clients.

Commitment to our Community

We are blessed with success and we want to give back to our community in as many ways as we can.

Be an Evangelist / Advocate / Missionary for our brand

Every employee has a sense of ownership in NAPLIA, and recognizes that everything we do represents our brand. We are proud of our company and want to spread the word.



**“If you had 3 votes
what would be your
top 3 core values?”**

The Importance of Core Values



The Importance of Core Values

<https://www.youtube.com/watch?v=QEhe6XtSWsc>

Core Values – “Built to Last” Insights

- Visionary companies tend to have only a few core values, usually between three and six.
- Few values can be truly *core* – values so fundamental and deeply held that they will change or be compromised seldom, if ever.
- An enduring great company decides *for itself* what values it holds to be core, largely independent of the current environment, competitive requirements or management fads.
- The key is to work from the individual to the organization.
- Core values require no external justification, they have intrinsic value and importance to those inside the organization.

(source: Built to Last, Successful Habits of Visionary Companies 1994, 1997. 2002)

Core Purpose

Why is what you do important? What if it did not exist?



Examples of Core Purposes

- Grant Thornton: To shape a vibrant economy
- Nike: To experience the emotion of competition, winning, and crushing competitors
- PwC: To build trust in society and solve important problems
- Wal-Mart: To give ordinary folk the chance to buy the same things as rich people
- Walt Disney: To make people happy

(source: Built to Last, Successful Habits of Visionary Companies
1994, 1997, 2002)

5 Why's

By repeatedly asking the question "why", you can peel away the layers of symptoms which can lead you to the root cause of an issue. Each time the question is answered, ask "why" again.

Why *is it important that I provide business guidance?*

Why *is it important my clients build a better business?*

Why *is it important that they grow their business?*

Why *is it important for them to be in control of their own destiny?*

Why *is it important for my clients to find their voice?*

Core Purpose Example

- Granite Rock Company of Watsonville, California
- “We make gravel and asphalt products. Why is that important?”
- *“To make people’s lives better by improving the quality of man-made structures.”*



(1992) Malcolm Baldrige National Quality Award

(source: Built to Last, Successful Habits of Visionary Companies 1994, 1997, 2002)

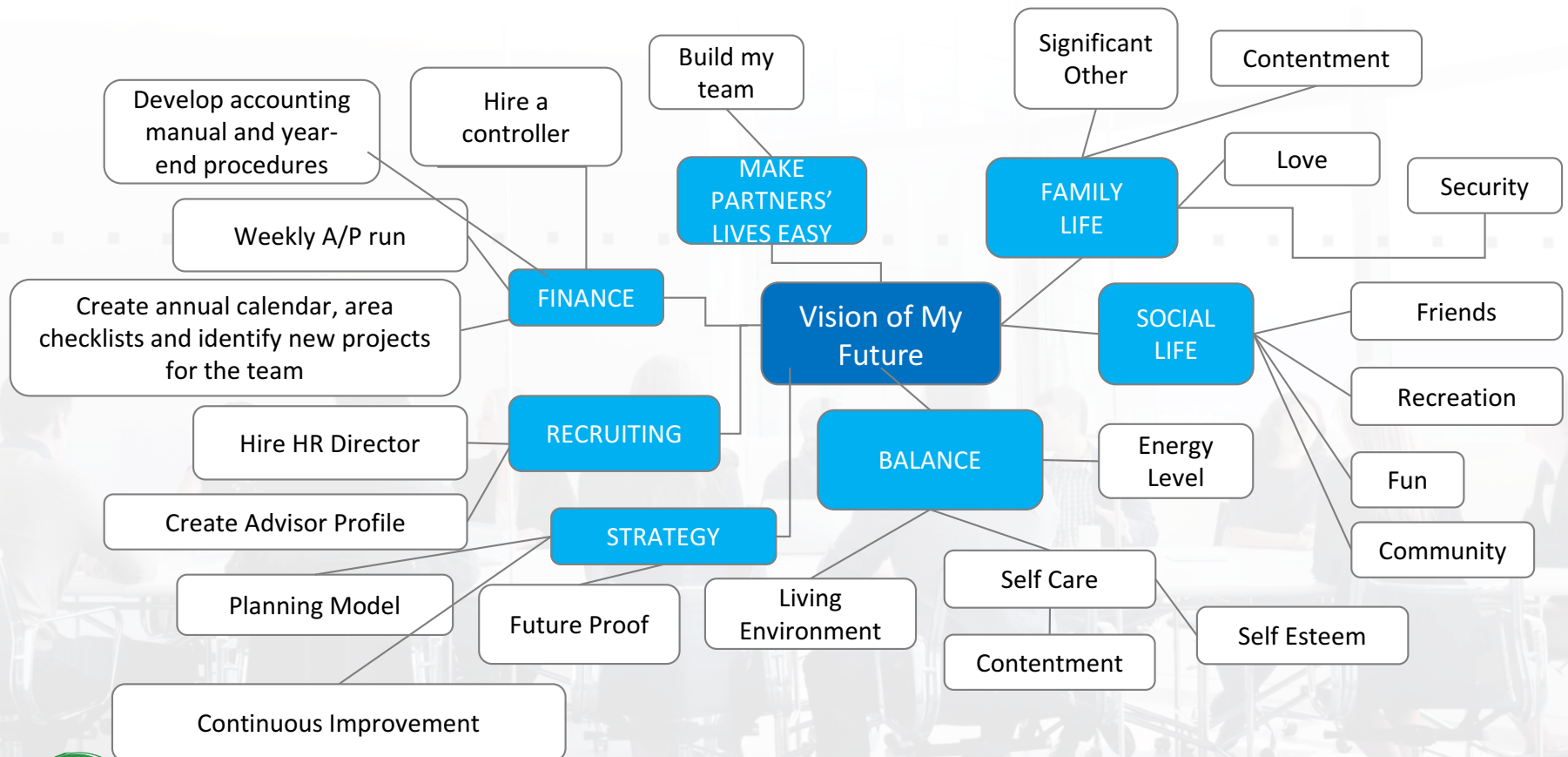
Vision

- Where are you heading – where do you want to be in 3 months, 12 months or 3 years' time?
- Vision is about performance outcomes/results!
- Must have a good understanding of where you are heading so as you focus on **how** to get there, you'll know what is important and what is not important



Vision Project - Brainstorming

- Where do you want to be? What do you want to create? How do you link with the firm's strategy?



Link with the Firm

FIRM'S CORE VALUES

Your core ideology,
vision and strategies

WHERE will we be
in the future?

FIRM'S
VISION

HOW do we
get there?

FIRM'S
STRATEGIES

NOW is today



NOW

HOW

WHERE

FIRM'S CORE PURPOSE

Summary

- Identify core values (who you are) and core purpose (why what you do is important) for the area you lead
- See your future today and link to the overall direction of the firm
- Look for ways to create change to achieve your vision – drive strategies into actions
- Ask “why?” often
- Develop your personal brand – be unique

What is your key insight from today?



A hand is shown holding a piece of yellowish-brown cardboard with the words "Thank You!" printed on it in a black, serif font. The background is dark with numerous out-of-focus, colorful bokeh lights in shades of blue, orange, green, and white. The lighting is soft and focused on the hand and the cardboard.

Thank You!

Sue Groszkiewicz, Strategic Business Advisor | Atlanta GA | 404.668.5403
sueg@accountableforchange.com | [accountableforchange.com](https://www.accountableforchange.com)