

My purpose workbook

My purpose

Your purpose is the rallying cry of your brand. It attracts and retains like-minded clients to your business. That means it should be authentic and align with your values, and those of ideal clients.

Your purpose includes your:



Vision



Mission



**Value
proposition**



Tagline

How to use this tool:

1. Use this workbook to identify your purpose. If you have a team, involve them in the exercise.
2. Consult trusted clients for their feedback on what you create. Use their feedback to further refine and finalize the elements of your purpose.
3. Put your purpose into action. Use it to align your client service model and marketing activities.



Vision and mission statements

Your vision is your **big picture goal** for what your business world will look like in the future. It should be brief, concise and clear.

Your mission statement describes **what you'll do** every day to achieve your vision and serve clients.

Take these examples:

<p>Sun Life¹:</p> <ul style="list-style-type: none">• Vision: To be one of the best insurance and asset management companies in the world.• Mission: Helping our clients achieve lifetime financial security and live healthier lives.	<p>Canadian Cancer Society²:</p> <ul style="list-style-type: none">• Vision: Creating a world where no Canadian fears cancer.• Mission: In trusted partnership with donors and volunteers, we improve the lives of all those affected by cancer through world-class research, transformative advocacy and compassionate support.
<p>IKEA³:</p> <ul style="list-style-type: none">• Vision: To create a better everyday life for the many people.• Mission: Offer a wide range of well-designed, functional home furnishing products at prices so low that as many people as possible will be able to afford them.	<p>Spotify⁴:</p> <ul style="list-style-type: none">• Vision: Unlock the potential of human creativity.• Mission: Giving a million creative artists the opportunity to live off their art and billions of fans the opportunity to enjoy and be inspired by it.

In these examples, the companies align their day-to-day missions to their big, inspirational goals. Their visions are large and ambitious. They create an emotional and value-based connection with their audience. Their missions are more direct and clearly illustrate how they serve clients.

¹ Sun Life Q3 2021 Shareholder Report

² Canadian Cancer Society Impact Report, 2018/19 and [website](#)

³ Ikea jobs, 2021

⁴ Spotify company info, 2021



What is your vision?

What do you want your future business world to look like? Your vision can be as inspirational and ambitious as you like. Make sure it's authentic to your beliefs and aspirations.

Sample vision statement

A world where finances don't keep people up at night.

Use the following table to identify your values and passions to bring your vision into focus:

<p>Ask yourself:</p> <ul style="list-style-type: none"> • What's important to me? • What motivates me every day? • Where do I want to take my practice? • What are my ideal client's goals? • What does success look like? 	<p>My vision statement:</p>
<p>Notes:</p>	

What is your mission?

Your mission describes the day-to-day activities you do to make your vision come true. Think of it as a high-level summary of the actions you take to serve clients to make your vision a reality.

Sample mission statement

To create plans that give clients confidence through any expected or unexpected life events.

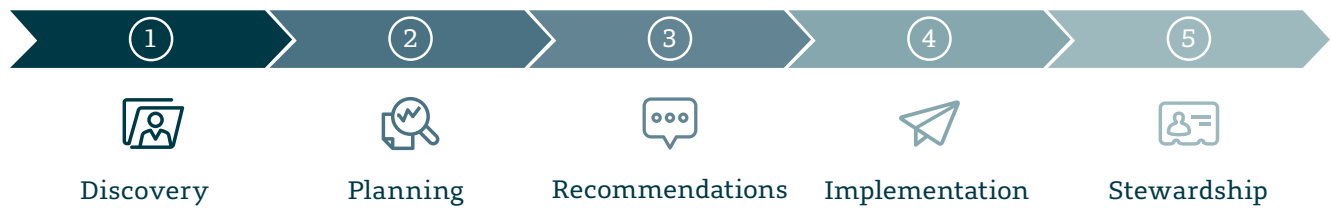
Use the following table to identify your values and passions to bring your vision into focus:

<p>Mission</p> <ul style="list-style-type: none"> • What do my ideal clients need? • How do I help clients? • What do clients get from working with me? 	<p>My mission statement:</p>
<p>My notes:</p>	

Value proposition

Identifying your value proposition starts with a reflection on your business and how it meets client needs and expectations. You can differentiate yourself by creating memorable experiences at each stage of the client engagement process.

Think about your engagement process. What's common practice? What's unique to your business? What do you excel at?



Common to the industry:	Unique to me:
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Next, consider the ideal client's needs and expectations.

Needs:	Expectations:
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Compare the client experience at each stage of your engagement process to the needs and expectations of ideal clients. Ask yourself these questions:

- Does what I offer align to clients' needs?
- How do I consistently exceed clients' expectations?
- How much of what I'm doing is unique to me?
- What can I stop doing?
- What can I reinvent to make unique?
- What can I add to better meet clients' needs and expectations?

Identify the responses that are unique to you and align with what ideal clients care most about. Based on your responses, and the value you provide at each stage of the client engagement process, identify your unique value proposition.

Your value proposition summarizes to clients how you stand out. It can speak to the services you offer, the actions you take to create exceptional experiences, the strengths of your team and any other aspect of your practice. It helps attract ideal clients by telling them why they should choose you over anyone else.

Sample value proposition

An empathetic approach from a multi-disciplined team of experts. Through on-going attention to detail, we'll help create the lifestyle you dream of for today and for the future. When concerns, doubts or ambitions grow, we're always one phone call away.

Use your reflections to write a 3-5 sentence value proposition.

My value proposition:



Tagline

Your tagline is an evocative description of your practice. It creates an association between your business name and your mission. The more memorable and unique it is, the more powerfully it'll resonate with clients.

Sample tagline
Sleep soundly. Live fully.

Strong taglines:

- Are short and simple
- Evoke emotions or images
- Provide meaning related to the mission or vision
- Use wordplay like rhyming, alliteration or puns
- Are unique and available for trademark registration

Choose a few key words that align with your mission. Then, use these words to craft a short statement about your brand.

Key words:			
My tagline:			

Next steps

Congratulations! You've put pen to paper to create your vision, mission, value proposition and tagline. Don't stop now. Keep refining, finalizing and promoting your brand.

1. Collect feedback from trusted clients and use it to finalize your purpose.

- Does your vision excite them? Are you accurately describing your mission?
- Have you captured your unique value? Does your tagline inspire them to want to connect?

2. Integrate your brand into your client service model.

- Meet with your team to discuss the role everyone plays in achieving your vision.
- Update your proactive services and plans for responding to difficult scenarios with clients to reflect your brand (example: what can you do in quarterly meetings to align to your brand?).

3. Align your marketing initiatives to your brand.

- Trademark your tagline and use it in conjunction with your practice name.
- Include your vision, mission and purpose on your website, LinkedIn profile and other promotional material.

4. Deliver a consistent and repeatable experience.

- Consider your purpose when making strategic decisions about your business. Make sure that every aspect of your practice reinforces your brand image.
- Hold your team accountable for delivering a repeatable client experience that supports your unique value proposition.