



CREATING A SHARED UNDERSTANDING OF PURPOSE



INTRODUCTION

A Midwest insurance and professional services company took part in a strategic planning process that revealed a significant void. The organization's workforce lacked a sense of shared purpose. **Bâton Global (B|G)** intervened to develop mission, vision, and values that aligned with the organization's goals and ambitions.



THE STORY

This insurance provider specializes in coverage solutions for healthcare professionals, offering malpractice protection and a range of other insurance and financial products. Dedicated to superior customer service, the company delivers comprehensive solutions to support the growth and protection of professional practices.



THE CHALLENGE

Despite utilizing slogans, the company lacked documented purpose statements, which led to an undefined organizational ethos. **B|G** conducted assessments, engaged employees, and facilitated workshops to bridge this gap and align purpose with the company's strategic plan.



THE CHOICE

B|G launched the collaborative process by ensuring employee involvement in crafting purpose statements. The result was a unified understanding of the company's purpose among employees, which fostered better service delivery, heightened employee engagement, and encouraged stronger bonds with customers. This alignment of mission, vision, and values laid the foundation for purpose-driven success.



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A Midwest insurance and professional services company took part in a strategic planning process that spotlighted a crucial gap within the organization. While the company utilized slogans to convey their value to customers, there was a lack of documented purpose statements, which left the true organizational ethos undefined and contributed to an inconsistent understanding of purpose among team members.

Recognizing the critical need for a cohesive direction, **Bâton Global (B|G)** led the charge to explore and develop the company's mission, vision, and values. **B|G** ensured the involvement of employees at every level in the developmental process, fostering collaboration among the executive leadership team, management, and other staff members. The objective was to instill a unified vision of the organization's purpose and aspirations. This collaborative effort not only bridged gaps but also aligned with the company's recently devised corporate strategy, paving the way for successful execution of key initiatives.

To launch this process, **B|G** conducted a comprehensive assessment of the organization's pre-existing articulation of purpose statements. The consultancy group gathered valuable insight by surveying employees to identify common purpose statements used internally and externally. Further, workshops were

conducted with upper-level managers and the executive team to evaluate the current state of vision, mission, and value statements. **B|G** shared various examples of purpose statements from other organizations, encouraging an exchange of ideas and facilitating discussions aimed at shaping the organization's overall purpose.

To ensure alignment with the organization's strategic direction, **B|G** facilitated workshops to engage employees in the crafting of meaningful purpose statements. Inclusivity was emphasized throughout the process, and employees completed surveys to refine the ongoing purpose statements. In collaboration with the organization, **B|G** released these purpose statements to the board of directors, which displayed strong alignment with the pre-existing strategic five-year plan. Multiple town hall meetings were also conducted to present the newly crafted purpose statements, gather additional feedback, and foster an open dialogue among employees.



The unveiling of these mission, vision, and values statements transformed the organization. Employees gained a deeper understanding of the fundamental “why” behind their roles, enabling them to articulate and recognize the value they offered to customers and the community. Through regular coaching and promoting success stories, employees were empowered to embody these purpose statements in their day-to-day responsibilities.

This alignment of mission, vision, and values not only enhanced internal cohesion but also resulted in tangible external impacts. Employees delivered better service, reflecting a heightened awareness of the organization's purpose, which translated into elevated customer experiences. Due to the heightened clarity and resonance of the organization's purpose, customers additionally perceived a stronger connection to the company.

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