Company values workshop: turn values into team behaviours

A company values workshop helps a team agree what its organisation’s existing values look like in its daily work, and what they do not look like. This kit gives you a 90-minute plan, a four-part behaviour test, eight hard-moment cards, commitment and review sheets and a filled example. It does not write values from scratch; if your organisation has none, it says what to do instead.

90 minutes | 4–16 participants | Online and adaptable in person

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The outcome

In 90 minutes the team writes, for each of up to five existing values, three behaviours that show it and two that do not, each passing a four-part test, and one commitment with a steward and a review date.

Before the session

- For team leads, L&D and HR partners and facilitators working with an intact team of 4–16 people at work.
- Write each value’s official wording, source and owner on the moments sheet. With more than five values, agree with the team lead which to cover. With none, do not run it; see the no-values table.
- Print a moments sheet per person, a behaviour sheet per value, the cards, and one commitment, parking and review sheet. Online, use one shared document with a section per value.
- Send the sheets as plain text a day early to anyone who asks. All activities are seated and can be done in writing. Passing is allowed, cameras are optional, no personal stories.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

- Moments sheet
- Value behaviour sheet
- Hard-moment cards
- Parking sheet
- Commitment sheet
- Review sheet
- Filled example: behaviour sheet for “Keep our promises”
- Commitment wording: weak and strong
- Filled example: the four values in this team
- Filled example: commitments
- Filled example: review after five weeks
- Facilitator section: run of show, reference tables, debrief and adaptations

Moments sheet

One sheet per person. The facilitator writes the values in the first column before the session, with the official wording if it is short. Use moments from the work in the last three months. No names, and nothing you would not want read aloud. You can pass on any row.

Values owner: _____ Where the values are published: _____ Review date: _____

Value (official wording)	What it asks of this team, in one line	A moment when it showed in our work	A moment when it was hard to live

Value behaviour sheet

One sheet per value. Write at least three lines for what the value looks like in this team and two for what it does not look like. Describe behaviour, never a named colleague. Tick each test the line passes: Seen (someone could see or hear it), Often (at least monthly), Ours (no approval needed), Specific (names our work). Rewrite any line that fails a test.

Value: _____ Group: _____

What it looks like here, and what it does not	Seen	Often	Ours	Specific
Looks like here 1:	☐	☐	☐	☐
Looks like here 2:	☐	☐	☐	☐
Looks like here 3:	☐	☐	☐	☐
Does not look like here 1:	☐	☐	☐	☐
Does not look like here 2:	☐	☐	☐	☐

The hard-moment card we tested, and the line we changed

_____

_____

The line we would turn into a commitment, and why

_____

_____

Hard-moment cards

Cut out the cards or paste them into the breakout rooms. All eight situations are fictional. Each group takes two cards and checks whether its behaviours still say what to do.

Card	The situation	Ask your group
1. The Friday promise	A customer asks for a firm answer today. You will only know on Tuesday whether the refund can be paid.	Which behaviour tells you what to say? Does any behaviour push you to promise too soon?
2. The figure that looks wrong	In a meeting with two senior managers you notice that a total in the plan on screen looks wrong. You are not certain.	Which behaviour helps you speak? What would make it easier to say?
3. The busy week	A colleague asks you to show them a new tool. It is your busiest week of the month.	Which two values pull apart here? What would you do?
4. The meeting that runs over	A 30-minute meeting with five people reaches the end without a decision. The next agenda item is short.	Do you stop, or run over? Which behaviour decides it?
5. The shortcut	A faster way to close a case skips one check step. The check rarely finds an error, but when it does the error is costly.	Which behaviour applies? Who would you tell before you change the process?
6. The idea in someone else's name	A colleague's idea was presented by another person in a senior meeting. The colleague was not there.	Which value is at stake? What would you do this week, and in what words?
7. The repeated mistake	A new colleague makes the same mistake you explained last week.	Which behaviour helps here, and which would do harm?
8. The 21:00 message	A message from a colleague in another time zone arrives at 21:00 your time. It is marked urgent.	Do your behaviours say what "urgent" means? What would you change?

Parking sheet

Questions about a value itself, its wording or its owner go here, not into the team's behaviours. The facilitator sends them to the values owner and brings the answers back. Writing your name is optional.

Question or concern about a value	Asked by (optional)	Sent to	Answer due

Commitment sheet

One sheet for the team. One commitment per value, written as “When [situation], we [behaviour], so that [what the value protects].” What you will notice should be a count or a record you already have. The steward keeps the commitment visible; the steward does not police colleagues.

Agreed on: _____ Review date (four to six weeks): _____ Review slot booked: Yes / No

Value	Our commitment: When…, we…, so that…	What we will notice	Steward	Review date

Review sheet

Use this sheet in a 20-minute review on the review date. The stewards bring their weekly counts. The counts start the conversation; they are not a score of the team or of anyone in it. For each commitment, decide to keep it, adapt it or drop it, and write what changes.

Review date: _____ Weeks counted: _____

Commitment (value)	Times we saw it kept	Times it was missed or hard	Keep / Adapt / Drop	What we change

Filled example: behaviour sheet for “Keep our promises”

A fictional eight-person customer accounts team. Its organisation has four values: Keep our promises, Speak up early, Learn every day and Respect people’s time. This is the sheet of the pair that took “Keep our promises”. The first draft failed two tests and was rewritten as the next three lines.

Line	Seen	Often	Ours	Specific	Passed
Looks like: We are reliable. (first draft)	No	Yes	Yes	No	2 of 4
Looks like: We give customers a date we have checked in the work queue, not a hopeful one.	Yes	Yes	Yes	Yes	4 of 4
Looks like: When a date slips, the customer hears it from us before the date passes.	Yes	Yes	Yes	Yes	4 of 4
Looks like: We write every promise made on a call in the account notes before we close the call.	Yes	Yes	Yes	Yes	4 of 4
Does not look like: Saying “I’ll sort it today” to end a difficult call.	Yes	Yes	Yes	Yes	4 of 4
Does not look like: Leaving a promise in someone else’s queue without telling them.	Yes	Yes	Yes	Yes	4 of 4

Commitment wording: weak and strong

Use this in the commitment step when a draft is vague. A commitment names a situation, a behaviour and what the value protects. The examples are fictional; write your own from the team’s moments.

Weak	Strong	Why the strong version works
We keep our promises.	When we cannot meet a date we gave a customer, we tell them before the date passes, with a new date we have checked.	It names the moment and the action, so the team can tell whether it happened.
We communicate better.	When we change a shared document after it has been sent, we post one line in the team channel saying what changed.	“Better” has no moment. The rewrite picks one real moment where communication fails.
We will always speak up.	When we see a risk to a deadline, we post it in the team channel the same day, with one proposed next step.	“Always” fails on the first busy day. A named situation can be kept.
We respect each other.	When someone is speaking in the Monday huddle, we let them finish before anyone replies.	Respect is the value. The commitment is one behaviour that shows it.
Nobody sends messages after 18:00.	When we send a request after 18:00, we write when we need the answer, and it is not before 10:00 the next working day.	A rule with no exceptions breaks when there is a real emergency. The rewrite allows late messages and removes the late answer.

Filled example: the four values in this team

The same fictional team after the read-through. Every line below passed all four tests. Twenty of the twenty-one lines written passed; the first draft “We are reliable.” did not.

Value	Looks like here	Does not look like here
Keep our promises	We give customers a date we have checked in the work queue, not a hopeful one. When a date slips, the customer hears it from us before the date passes. We write every promise made on a call in the account notes before we close the call.	Saying “I’ll sort it today” to end a difficult call. Leaving a promise in someone else’s queue without telling them.
Speak up early	We post a risk to a deadline in the team channel on the day we see it, with one next step. In the Monday huddle anyone can say “I’m stuck” and a helper is named before the huddle ends. We question a figure in a report before it goes out, even when a senior person wrote it.	Raising a known problem for the first time on the due date. Agreeing in the meeting and disagreeing in a private chat afterwards.
Learn every day	After a complaint is closed, the person who handled it posts one lesson in the Friday notes. A new colleague works alongside an experienced one on their first ten complex cases. We try a suggested change for two weeks before we judge it.	Fixing the same error quietly every month without telling anyone where it starts. Answering a question with “just read the guide”.
Respect people’s time	Every meeting invite has a purpose and an agenda. Meetings end five minutes before the hour or the half hour. We mark a message urgent only when it needs an answer within two hours.	Inviting the whole team “just in case”. Sending a request after 18:00 that expects an answer the same evening.

Filled example: commitments

The fictional team’s commitment sheet, agreed on Tuesday 3 November 2026. The review is on Tuesday 8 December 2026, 35 days later. Stewards are named by role.

Value	Our commitment	What we will notice	Steward	Agreed on	Review date	Days to review
Keep our promises	When we cannot meet a date we gave a customer, we tell the customer before the date passes, with a new date we have checked, so that our dates can be trusted.	Dates missed with no message beforehand, from the weekly queue report	Adviser A	Tue 3 Nov	Tue 8 Dec	35
Speak up early	When we see a risk to a deadline, we post it in the team channel the same day, with one proposed next step, so that nobody hears about it on the due date.	Risks posted, and deadlines missed with no earlier post	Team lead	Tue 3 Nov	Tue 8 Dec	35
Learn every day	When a complaint is closed, the person who handled it posts one lesson in the Friday notes, so that the next person does not repeat it.	Lessons in the Friday notes against complaints closed that week	Adviser B	Tue 3 Nov	Tue 8 Dec	35
Respect people’s time	When we book a meeting, we send its purpose and agenda with the invite and end five minutes early, so that people can prepare and get to the next one.	Invites with a purpose and agenda; meetings that ended early	Adviser C	Tue 3 Nov	Tue 8 Dec	35

Filled example: review after five weeks

The fictional team’s review on Tuesday 8 December 2026, with the stewards’ counts for the five weeks to Friday 4 December. Across the four commitments the team saw them kept 46 times and missed or hard 13 times. Two commitments stay as they are and two change.

Commitment (value)	Week to 6 Nov	Week to 13 Nov	Week to 20 Nov	Week to 27 Nov	Week to 4 Dec	Seen	Missed or hard	Share kept	Decision	What we change
Keep our promises	2	3	1	2	3	11	2	85%	Keep	Both misses were on Fridays. Add a Thursday check of dates due on Friday.
Speak up early	1	0	2	1	1	5	4	56%	Adapt	Risks were seen in the huddle but not posted. Post from the huddle, in the meeting, before it ends.
Learn every day	3	2	2	3	2	12	1	92%	Keep	The Friday notes are read. Keep the one-lesson limit.
Respect people’s time	4	3	4	3	4	18	6	75%	Adapt	Agendas are sent. Ending early fails in back-to-back meetings. Try 25 and 50-minute bookings.

Facilitator run of show

1 Open and set the scope | 8 minutes

Three minutes: say the purpose. Say: “Our organisation already has these values. Today we will not rewrite them. We will agree what each one looks like in our own work, what it does not look like, and one commitment for each value that we will review on [review date].” Two minutes: show the parking sheet. Say: “If you have a question about a value itself, or you disagree with its wording, write it here. I will send it to [values owner] and bring the answer back.” Three minutes: agree the rules. Moments come from the work, not from anyone’s private life. A “does not look like” line describes a behaviour, never a named colleague. Anyone can pass or write instead of speaking. Nothing written today is used to rate a person.

2 Read the values and write what each asks of us | 7 minutes

Two minutes: read each value aloud with its official wording, and say where it is published and who owns it. Five minutes of silent writing on the moments sheet: for each value, one line on what it asks of this team in particular. Say: “Not what the value means in general. What does it ask of us, with our customers, our tools and our deadlines?”

3 Collect recent moments | 12 minutes

Six minutes of silent writing on the moments sheet: for each value, a moment from the last three months when it showed in the work, and a moment when it was hard to live. Say: “No names, and nothing you would not want read aloud.” Six minutes: go round once. Each person reads one moment, hands it over in writing or passes. Note each moment in a few words under its value on a flip chart or in the shared document. Online, people type their moments in the chat or the shared document.

4 Draft behaviours and test them | 18 minutes

Two minutes: form groups with the group planner, one value per group (see “Groups for your team size”), and show the behaviour test. Ten minutes: each group fills a value behaviour sheet with at least three “looks like here” lines and two “does not look like here” lines, using the moments under its value. Say: “Write what someone could see or hear. Start with ‘We…’ or with a situation: ‘When…’.” Six minutes: the group runs each line through the four tests (seen, often, ours, specific), ticks the boxes and rewrites any line that fails a test. Say: “If nobody could see or hear it happen, rewrite it.” Walk between groups and ask for one example moment behind each line.

5 Test the behaviours against hard moments | 15 minutes

Two minutes: give each group two hard-moment cards. Choose cards that touch its value; card 3 and card 6 suit most values. Six minutes: for each card the group asks whether its behaviours say what to do, and changes or adds one line if they do not. Seven minutes: each group reports in about a minute and a half: the card, what their behaviours told them, and one line they changed. Say: “A value is easy on a quiet day. These cards show whether our lines still help on a hard one.”

6 Break | 5 minutes

Five minutes. Put all the behaviour sheets on the wall, or keep the shared document open, so people can read them on the way back.

7 Read all the values and choose one commitment each | 15 minutes

Five minutes: everyone reads all the behaviour sheets and adds written notes: a tick for “I can do this”, a question mark for “unclear”. Four minutes: each group turns its strongest behaviour into one commitment, using the form “When [situation], we [behaviour], so that [what the value protects].” Use the table “Commitment wording: weak and strong” if a draft is vague. Six minutes: read each commitment aloud. Ask for concerns before support. Then each person shows or writes one of three answers: support, can live with it, cannot support. If anyone cannot support it, ask: “What would you need to change?” Change it once. If it is still blocked, park the commitment on the parking sheet and keep the behaviours.

8 Name what you will notice, a steward and a review date | 7 minutes

Four minutes: fill in the commitment sheet together. For each commitment write what the team will notice when it is kept (a count or a record you already have), a steward and the review date. Say: “A steward keeps the commitment visible and brings the count to the review. A steward does not police colleagues.” Three minutes: set the review date four to six weeks away and book a 20-minute slot now. Agree that the stewards count once a week: the times the team saw the commitment kept, and the times it was missed or hard.

9 Read back and close | 3 minutes

Read the commitments aloud. Say: “These go into our team charter as working agreements, and we review them on [review date].” Ask each person for one word about the session, aloud or in the chat, or a pass. Collect the parking sheet and say when the answers will come back.

Reference tables

If your organisation has no values, or they are changing

This session starts from values the organisation already has. It does not write values from scratch, and it does not change their official wording.

Situation	What to do
The organisation has no published values	Do not write values in this session. Use the team charter template to agree a purpose and working agreements instead. If the team wants values of its own, first agree with the leadership who owns them; writing values is a different session with a different decision.
The values are being rewritten	Wait until the new wording is published, or run only the working agreements of the team charter now and this session later.
People disagree with a value itself	Write the question on the parking sheet and send it to the person who owns the values. Work on the behaviours the team can agree. Do not edit the official wording in the room.
There are more than five values	Agree with the team lead before the session which four or five matter most for this team now, and say so at the start. Cover the rest in a second session.
Values are part of performance ratings	Say at the start that nothing written today is used to rate a person. Keep the sheets in the team space, not in personal files.
The team is in an open conflict, or the session follows a complaint	Do not run it. Speak to the manager or HR first. A values session is not a way to settle a dispute between named people.

The behaviour test

Run every “looks like” and “does not look like” line through all four tests. A line that fails one test is rewritten, not dropped. The test was written for this kit; it is a practical check, not a validated model.

Test	Ask	Fails the test	Passes the test
1. Seen	Could someone see or hear it happen?	“We are reliable.”	“We write every promise made on a call in the account notes before we close the call.”
2. Often	Does the moment come up in our work at least once a month?	“We stay calm in a crisis.” (rare for most teams)	“When a date slips, the customer hears it from us before the date passes.”
3. Ours	Can this team do it without anyone else’s approval or budget?	“We get a better ticket system.”	“We mark a message urgent only when it needs an answer within two hours.”
4. Specific	Would it sound odd in another team’s list, because it names our work?	“We communicate openly.”	“We question a figure in a report before it goes out, even when a senior person wrote it.”

Debrief and next steps

Questions for reflection

- Which line changed most between the first draft and the version that passed the four tests, and what made the difference?
- Which hard-moment card showed two values pulling in different directions, and what did the team agree to do in that moment?
- Which “does not look like” line describes something this team does now, and what would make it easier to stop?
- What will the stewards count, and what would tell you at the review that a commitment should be adapted or dropped?

Adapt the session

- For 4 or 5 people, work in pairs (or one trio) and give each pair two values; split the 18 minutes for drafting and testing into nine minutes per value. In the commitment step, the whole team writes one commitment per value together.
- For a 60-minute version, cut the moments step to 6 minutes and the drafting step to 14, and leave out the hard-moment cards and the break (90 − 6 − 4 − 15 − 5 = 60). Use the cards at the first review instead.
- Online, use breakout rooms for the groups and one shared document with a section per value, the behaviour test at the top and the cards pasted in each section. People type moments in the chat or the document; cameras are optional. For the support check, use a three-option poll or written replies.
- For quiet participants or anyone who prefers not to speak, every step can be done in writing: moments on the sheet, notes on the behaviour sheets, and the support check as a written answer. Read sheets aloud rather than asking the writer to. Passing is always allowed and needs no reason.
- For a large organisation with several teams, run the session team by team with the same values, owner and test. Do not compare teams’ counts at the review; each team’s commitments fit its own work. Send the parking sheets to the values owner together.

After the session

Within one working day, send the commitment sheet and the behaviour sheets to the team and add each commitment to the team charter as a working agreement. Send the parking sheet to the values owner and give the team the date the answers will come back. Each Friday the stewards note two counts per commitment: times the team saw it kept and times it was missed or hard. On the review date, hold a 20-minute review with the review sheet and decide to keep, adapt or drop each commitment. Write the next review date before you close.

Questions people ask

How do you run a company values workshop with a team?

Start from the values the organisation already has. Read them, collect recent moments from the work when each value showed or was hard, and draft what each value looks like in this team and what it does not look like. Test each line with four questions (seen, often, ours, specific), then agree one commitment per value with a steward and a review date. This kit times those steps in 90 minutes.

What if our organisation has no values?

Do not write them in this session. This kit assumes published values. Use the team charter template to agree a purpose and working agreements instead. If the team wants values of its own, first agree with the leadership who owns them, because writing values is a different decision that needs a different session. The same applies while values are being rewritten.

How is this different from the team charter template?

The team charter template writes a team’s purpose, decision rights and working agreements from the problems the team has now. This session starts from the organisation’s values and turns each one into behaviours and one commitment. Its commitments go into the charter as working agreements. The trust building activities are a separate 45-minute conversation session and do not use the values.

Can we change or vote on the company values in this session?

No. The official wording stays as it is. A question or disagreement about a value goes on the parking sheet and to the person who owns the values. The team works on the behaviours it can agree now.

Can the behaviours be used in appraisals or performance reviews?

This kit is not built for that and says so at the start. The behaviours and commitments describe how the team works together, and the counts at the review describe the team, not a person. Follow your organisation’s own policy for performance reviews.

What is included in the free and editable files?

The open PDF has every participant sheet, the eight cards, four filled examples and the 90-minute plan. Subscribers also receive the editable Word file, an Excel workbook (session plan, group planner, a behaviour board that applies the tests, commitments with days to the review, and a review tally) and a CSV of the session plan.

Use and sharing

Free to use and adapt in your own training sessions, including paid client work. Do not resell or redistribute the unmodified download as a standalone product. Share the resource page instead.