



**BoardEffect**  
a Diligent brand



# The Leading with Purpose Workbook

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Reconnect with  
Your Why



# Why You're Here

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**Leading with purpose:** It's a phrase with powerful connotations in the business world as leaders search for new ways to keep organizations effective amid rapid change. When you step back and get a bigger picture — that is, when you have a clear idea of how you want to make an impact — the answers come as quickly as the challenges, for you and for your organization.

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“The two most important days in a person's life is the day they were born and the day they find out why.”

– Mark Twain

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## Leading with purpose is about being proactive instead of reactive.

It is not a static effort. It is not the result of a one-and-done consultation or single questionnaire. Perhaps you've found yourself at a new organization, or an organization ready to transform from a conventional identity. Perhaps you've done some reading on leading with purpose but stopped short of truly examining and implementing the changes it can bring to your career goals and organization. Perhaps you've realized that what you earlier considered “leading with purpose” isn't quite right, and you need new ideas to move forward.

Whatever your particular situation, the Leading With Purpose Workbook is a place to begin implementing the efforts of purpose-driven leadership and get ready for the transformation your organization can experience.

**?** **What is the biggest challenge you face? Why did you seek out this workbook?**

# What Is Leading With Purpose?

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Historically, the focus on workplace success has centered fully on performance: sales or other conversion volume, customers satisfied. In mission-driven organizations, the metrics may be somewhat different (from meals served to patients treated), but the quantifiability is the same.

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“In a rapidly changing world, purpose-driven leadership can be what guides and strengthens your decision-making, no matter the environment you find yourself in.”

– Dottie Schindlinger, Executive Director, Diligent Institute

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These two-dimensional metrics are crucial, but for individuals who devote some or all of their careers to mission-driven entities, it is natural to look beyond the metrics to measure the inner satisfaction created by the work. Most not-for-profit staff members have chosen that work for a reason, after all.

## Why Lead With Purpose

When you lead with purpose, the basic needs of a healthy organization are easier to meet. Ethics are the underpinning of leading with purpose: transparency, accountability, truth. When you are consistent in your actions and responses, those you depend upon to support your goals can be better prepared to react to new initiatives or even predict what comes next.

A 2017 study from Ernst & Young found that a whopping **96% of leaders** considered purpose to be a key element in their job satisfaction.

## The Pillars of Purpose-Driven Leadership

Knowing your skills and competencies is important; building that base is what drives the early phase of our careers as we settle into first jobs, take on new roles, shed others. But to lead with a purpose, you also need to look beyond. And those questions of what stokes our passions — what gives our lives meaning — are just as important, if not more so, than inventorying skills. Truly understanding your “why” not only gives meaning to your existing skills; it can guide you to form new abilities and connections to achieve more important goals.

### Determine Your “Why”

Determining your “why” involves asking hard questions about your values, your priorities and who you are as a unique individual. Complete as many of these exercises as you need until you are confident you can articulate your “why.”

- Ask a few trusted friends or colleagues to name three characteristics they’d use to describe you.

- Look to your CV or resume for themes, specifically in the accomplishments that gave you the greatest satisfaction. Take the text from your CV and run it through a word-cloud generator such as [wordclouds.com](http://wordclouds.com) for insights.

- Ask yourself these questions:
  - When you were a child, who did you most want to emulate when you grew up? What about them inspired you?
  - Have you ever “captured lightning in a bottle?” What gave you that feeling?
  - What are the things you would do even if you didn’t get paid for them?
  - What do other people say you’re really good at, or that you should do professionally, or do more of?
  - What is one key thing you want to experience or accomplish before you die?
  - If you had all the money in the world, how would you spend your time?
  - What would your perfect day look like? Describe every detail.
  - What activities set your soul on fire?
  - What is a story from your past — even your childhood — that illuminates who you are?

## What Is My “Why”?

“There were tens of thousands of children in the state who could not access mental health services, and my son was one of them. They were my purpose and my ‘why’.”

– Toni Hoy, Author, *Second Time Foster Child*

# Reconnect With Your “Why”

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Depending on your career or life phase, you may already have engaged in identifying your purpose. Whether you are new to the experience or have already put in the work, revisiting your “why” and connecting it to a personal mission statement is an enlightening exercise.

## Write a Personal Mission Statement

Here’s the fun part. Because your personal mission statement is just for you, it can have meaning unique to who you are. (If you’ve already crafted a mission statement, this is an opportunity to revisit it with fresh eyes.) A few samples from Indeed.com include:

- “To encourage and equip others to live the lives they want to live.”
- “To inspire others in my community to achieve great things.”
- “To improve the quality of life of my patients.”

These types of mission statements echo the language and ideology of many organizations’ statements. A Harvard Business Review article about purpose-driven leadership includes a few more colorful examples of personal mission statements, including that of Heineken CEO and president Dolf van den Brink: [“To be the wuxia master who saves the kingdom.”](#)

## What Is My Personal Mission Statement?

# The Roadmap: Getting There from Here

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The power of the personal mission statement is in how it can guide your individual choices and your leadership. Your personal mission statement does not need to match your organization's statement, but aligning them unlocks potential.

Let's say you have an organization whose mission is to work with communities to “[increase income, improve child nutrition, care for the Earth and ultimately end world hunger and poverty.](#)” (This would be Heifer International.) Now let's say your personal mission statement is “[Open windows to greater understanding for the betterment of humanity.](#)” Your mission statement might guide you to:

1. Focus on education initiatives both internally and externally.
2. Hire and promote key team members who display empathy.
3. Create employee volunteer efforts within your organization that allow team members to experience and fulfill the needs of local populations.

## Understand and Address Your Unique Challenges

Understanding the circumstances you uniquely face is critical to identifying the next steps in achieving your goals. The personal SWOT analysis or matrix is a proven, insightful tool to capture your Strengths, Weaknesses, Opportunities and Threats. By inventorying these elements, you can more easily determine how to employ your strengths and opportunities to overcome the weaknesses and threats that hinder success.

MY STRENGTHS	MY WEAKNESSES
<ul style="list-style-type: none"> <li>What are my strengths?</li> <li>What do others see as my strengths?</li> <li>What values do I prioritize and exhibit?</li> </ul>	<ul style="list-style-type: none"> <li>What are my weaknesses?</li> <li>What are my bad habits?</li> <li>What personality traits are holding me back?</li> </ul>
<b>SWOT</b>	
Analysis	
<ul style="list-style-type: none"> <li>What new technology can help you?</li> <li>What trends do you see in your industry and how can you take advantage of them?</li> <li>Is there a need at your organization that no one is filling?</li> </ul>	<ul style="list-style-type: none"> <li>What obstacles are you facing?</li> <li>Could any of your weaknesses lead to threats?</li> <li>Does changing technology threaten your position?</li> </ul>
MY OPPORTUNITIES	MY THREATS



**? Considering the strengths and opportunities you identified above, what are three ways your personal mission statement can guide you to address the challenges you've identified earlier in this book?**

## Finding Tools for Effective Leadership

As purpose-driven leadership has become more ingrained in the mission-driven organization, tools have become readily available to support leaders who prioritize ethics, security and respect for the time commitments of their staffs and audiences. For these leaders, efficiency, transparency and accountability — and tools to support those goals — are necessary to support both their own and their organization's missions.

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“One of the things I love about BoardEffect is that we can give the board members the information they need to make informed choices to help the organization. I mean, people serve on nonprofit boards because they care deeply about the mission.”

– Rita Auritt, Senior Governance Advisor

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Diligent's BoardEffect can help today's leaders with these challenges:

- **Digital resilience.** BoardEffect enables organizations to be technologically savvy, nimble and, above all, secure.
- **Increased focus on diversity.** It's never been easier to engage potential candidates in the first steps of engagement through the BoardEffect portal.
- **Board effectiveness.** The traditional in-person meeting as a default has given way to the efficiency and access of hybrid meetings. Whatever the model, BoardEffect offers support.
- **Transparency.** Increased scrutiny on compensation and other issues makes BoardEffect's ease of use critical for leaders, staff and community.

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 **What first step will you take to address the challenge you noted in the beginning of this workbook?**

“My advice for leaders in trying to become more purpose-driven is to listen, engage with your community, begin to think deliberately about areas that represent common vision and to begin to convene people around what they agree on. And to begin to better understand how a system will take steps toward achieving goals when they’re supporting.”

– Bradford Saron, Superintendent, Sun Prairie, South Dakota

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Purpose-driven leadership has transformed the lives, careers and organizations of many of today’s strongest executives, board members, administrators and others. By identifying and truly living by your “why,” as well as implementing the right tools and solutions for support, you can find an effective path toward guiding your organization through the unique challenges it faces today.

**Good luck, and thank you for letting Diligent be a part of your journey.**

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## About BoardEffect

We’re passionate about the work of boards, which drives how we develop the BoardEffect solution.

Boards operate in a series of overlapping cycles: a regularly scheduled meeting cycle, an annual operating cycle, and the cycle of longer-term board development and engagement. BoardEffect’s solution supports a modern approach to governance, powering boards’ interdependent responsibilities across these ongoing cycles.

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