



VALUES ALIGNMENT AUDIT

Compass Leadership in Practice — Movement 2 Implementation Tool

What this is:

The Values Alignment Audit is the practical application of Pillar 2: Values alignment eliminates costly drift. Use this tool during strategic planning to evaluate each goal, and during marketing planning to evaluate each strategy or tactic. The core question: Is this in alignment with our values? Complete Part 1 first, then apply it to your current goals and strategies in Parts 2 and 3.

Part 1 — Your Core Values (from Ring 1)

List your organizational values here. If you completed the Ring 1 exercise in the workbook, transfer them now.

MY CORE VALUES	WHAT IT LOOKS LIKE IN PRACTICE
Value 1:	
Value 2:	
Value 3:	
Value 4:	
Value 5:	

Part 2 — Strategic Goals Alignment Check

For each goal in your current strategic plan, ask: Is this in alignment with my values?

GOAL	VALUE(S) IT SERVES	ALIGNED?	IF NOT — WHAT CHANGES?
Goal / Strategy 1:	Value(s) it serves:	☐ Yes ☐ No	If not aligned:
Goal / Strategy 2:	Value(s) it serves:	☐ Yes ☐ No	If not aligned:
Goal / Strategy 3:	Value(s) it serves:	☐ Yes ☐ No	If not aligned:
Goal / Strategy 4:	Value(s) it serves:	☐ Yes ☐ No	If not aligned:
Goal / Strategy 5:	Value(s) it serves:	☐ Yes ☐ No	If not aligned:
Goal / Strategy 6:	Value(s) it serves:	☐ Yes ☐ No	If not aligned:

Part 3 — Marketing Strategies + Tactics Check

For each marketing strategy or tactic you're currently using or considering: Does this reflect who we are? Does this feel like us?

STRATEGY / TACTIC	VALUE(S) IT REFLECTS	ALIGNED?	IF NOT — WHAT CHANGES?
Goal / Strategy 1:	Value(s) it serves:	☐ Yes ☐ No	If not aligned:
Goal / Strategy 2:	Value(s) it serves:	☐ Yes ☐ No	If not aligned:
Goal / Strategy 3:	Value(s) it serves:	☐ Yes ☐ No	If not aligned:
Goal / Strategy 4:	Value(s) it serves:	☐ Yes ☐ No	If not aligned:

Part 4 — The Drift Check

Review your answers above honestly.

Where are you currently drifting — pursuing goals or using strategies that aren't in alignment with your values?

What has that drift cost you — in time, money, energy, or reputation?

What one decision would immediately bring you back into alignment?

Review Date: _____ *Use this audit at every quarterly strategic planning session.*