

## PART ONE – DISCOVER YOUR REASON WHY

### What is a Core Purpose?

- The fundamental reason WHY an organization exists.
- It is the *transformation* we hope our core constituents will experience through our organization.
- It answers these core questions:
  - Why do we exist?
  - What is the contribution we make?
  - Why is the world better because we are here?
  - What would be missed if we disappeared?
- A Core Purpose does not change. It becomes the primary ongoing commitment of an organization.

### Why have a Core Purpose?

- It guides and filters everything an organization chooses to do, and not do.
- It is the deeper reason why every member of the team will continue to get up out of bed each day to foster its survival and success.
- Great purposes are transcendent, energizing, and inspiring for all the independent stakeholders.

### Four Inspirations to Clarify Core Purpose

When contemplating what your Core Purpose might be, look to the Four Inspirations of Purpose to inspire you: good, knowledge, beauty, and change. These four inspirations are illustrated on the following pages.

## The Purpose of Bringing Good

- A core purpose committed to deliver authentic service to others
  - Based on genuine empathy with the needs and desires of others
  - Expressions of love, care and compassion
  - See ways to grow the emotional intelligence of their organizations so they can nourish love, care, and compassion
- **The Container Store** – “Get organized, be happy.”
  - **Zappos** – “Delivering happiness.”
  - **Amazon** – “To be earth’s most customer-centric company.”
  - **JetBlue** – “Inspire humanity.
  - **Wegmans** – “Helping families live healthier, better lives through food.”
  - **Starbucks** – “To inspire and nurture the human spirit – one person, one cup, and one neighborhood at a time.”
  - **Whole Foods** – “to nourish people and the planet.”
  - **Vs. Cancer** – “to empower any sports team, any athlete and any community to help kids with cancer.”

*What is the good, the care, the relief, or the empathy your company intends to bring to customers and the world?*

- Relieve CFOs and finance teams from the stress of manual reporting.
- Provide peace of mind knowing reports are accurate and compliant.
- Free up nights and weekends for financial leaders who would otherwise be stuck in spreadsheets.
- Reduce burnout and overwhelm for analysts and controllers.
- Increase confidence in the numbers presented to CEOs and boards.
- Build trust among leadership teams through reliable data.
- Offer reassurance in times of regulatory scrutiny or audit.
- Give financial leaders time back to focus on strategy, not survival.
- Bring clarity to messy, siloed systems.
- Empower finance teams to feel valued and supported rather than invisible “number crunchers.”

## The Purpose of Bringing Innovation

- A purpose that embraces the search for truth and the pursuit of knowledge.
  - Pursuit of knowledge, discovery and learning something never known before.
  - The pursuit of advancements that improve the quality or sustainability of life, animals, nature, the environment, or the world at large.
  - A purpose related to the discovery of knowledge that enhances, heals, extends, or otherwise improves.
- **Google** – “To organize the world’s information and make it universally accessible and useful.”
  - **Intel** – “To create world-changing technology that improves the life of every person on the planet.”
  - **Genentech** – “To deliver more life to every patient today and fuel tomorrow’s breakthroughs.”
  - **Amgen** – “To serve patients by transforming the promise of science and biotechnology into therapies that have the power to restore health and save lives.”
  - **Medtronic** – “To contribute to human welfare.”
  - **Bright Pink** – “To save lives from breast and ovarian cancer by empowering women with knowledge and information.”
  - **Global Communities** – “Brings together local ingenuity and global insights to save lives, advance equity, and secure strong futures.”

*To what solution does your business intend to dedicate continuous innovation, search for truth, or pursuit knowledge?*

- Seamless integration across multiple financial and operational systems.
- AI-driven insights that surface anomalies before they become crises.
- Automation of complex reporting processes.
- Real-time dashboards that replace static spreadsheets.
- Predictive analytics that inform better strategic choices.
- Standardization that eliminates errors caused by manual processes.
- Continuous updates that adapt to changing compliance requirements.
- Data visualization that makes information instantly understandable.
- Search and query tools that democratize data access beyond finance.
- Ongoing R&D to stay ahead of evolving financial technologies.

## The Purpose of Bringing Beauty

- A purpose that expresses the pursuit of beauty, excellence, and the quest for perfection.
  - Often seen through organizations dedicated to creative arts including design, music, painting, film, and handicrafts, as well as through methods of creating a better life through laughter, play, fun, or adventure, travel, or experiences.
  - True excellence expresses beauty in unique and inspiring ways to make our lives more enjoyable or uplifted.
- **Apple** – “To create insanely great technology.”
  - **Ritz-Carlton** – “To inspire life’s most meaningful journeys.”
  - **BMW** – “The ultimate driving machine.”
  - **The Smithsonian Institute** – “To increase the diffusion of knowledge.”
  - **Abercrombie & Kent** – “To provide travel that enhances and changes lives.”
  - **First Descents** – “To provide life-changing outdoor adventures for young adults impacted by cancer.”
  - **CoachArt** – “To create a transformative arts and athletics community for families impacted by childhood chronic illness.”

*What is the specific form of beauty, excellence, or knowledge your company intends to devote itself to bringing to customers, society, and the world?*

- Elegant dashboards that make complex data simple.
- Clean, intuitive user interfaces that reduce learning curves.
- Reports that tell a clear, compelling story for executives and boards.
- Visualizations that highlight patterns and trends at a glance.
- Precision in calculations and reconciliations.
- A sense of “calm” in data presentation—no clutter, no chaos.
- Seamless user experiences across platforms and devices.
- Consistency in branding and formatting of reports.
- Accuracy that instills confidence and pride in presentation.
- An overall aesthetic of clarity, order, and professionalism.

## The Purpose of Fostering Change

- A purpose motivated by a desire to change the world, not necessarily through service to others, or through discovery and pursuit of knowledge, or through the quest for perfection, but through the desire to really change things.
- To truly make the world better.
- To solve insoluble problems.
- To do the really courageous thing even when it is very risky.
- To achieve what others say is impossible.
- When Henry Ford first created the **Ford Motor Company** – “Opening the highways to all mankind.”
- **Grameen Bank** – “empowers the poor, especially women, to create a world without poverty and hunger.”
- **Watts of Love** is a global solar lighting nonprofit – “to bring people the power to raise themselves out of the darkness of poverty.”
- **Red My Lips Organization** – “To transform our culture of sexual violence by educating, inspiring, and mobilizing a global community to red their lips, raise their voices, and create real change.”

*What is the specific change your company aims to bring to the world, society, community, or specific problem?*

- Shift finance teams from reactive reporting to proactive strategy.
- Change the perception of CFOs from “number reporters” to “strategic leaders.”
- Move organizations away from data silos into integrated truth.
- Break the cycle of dependence on error-prone spreadsheets.
- Democratize access to financial insights across leadership teams.
- Increase transparency and accountability in financial reporting.
- Elevate finance functions from cost centers to value creators.
- Reduce risk of errors that can derail company decisions.
- Change how quickly organizations can respond to external pressures.
- Set a new standard for excellence in financial analytics.

## PART TWO - DISTILL YOUR PURPOSE

1. Why did you start this business? Reflect upon your company inception story and see the reasons why you were inspired to start this organization?

- ☐ CFOs were drowning in spreadsheets and manual work.
- ☐ Reporting cycles were exhausting teams and causing burnout.
- ☐ Boards demanded clarity and speed that existing tools couldn't deliver.
- ☐ Financial systems didn't integrate, leaving leaders without a single source of truth.
- ☐ Too much time was wasted reconciling data instead of shaping strategy.
- ☐ CFOs lacked tools designed from their perspective, not IT's.
- ☐ We believed better reporting could unlock smarter, faster decisions.

2. What gets you up each and every day? What do you hope the impact will be on the people served by your company? Consider the inspirations of good, knowledge, beauty, and change.

- ☐ Transformation from overwhelm to clarity.
- ☐ Complete confidence in the accuracy of their numbers.
- ☐ Relief from the chaos of last-minute reporting fire drills.
- ☐ Tools that make complex reporting elegant and effortless.
- ☐ Time and space to focus on strategy, not survival.
- ☐ Stronger trust with boards, CEOs, and stakeholders.
- ☐ A sense of pride and recognition for CFOs and their teams.

3. What drives your belief in this company? What do you do that is unique or different than every other business in your market?

- ☐ We design with empathy for CFOs and their realities.
- ☐ Our integrations solve complexity others cannot.
- ☐ We deliver reporting that is board-ready from the start.
- ☐ Our focus is on clarity and trust, not just speed.
- ☐ We thrive under the pressure of audits and compliance.
- ☐ Our culture values excellence, accuracy, and reliability.
- ☐ We believe numbers should empower leaders, not overwhelm them.

4. Today, tomorrow, and always, what is the impact you want to create for each and every person you serve?

- ☐ Knowing Francine, our avatar CFO, will walk into her boardroom with confidence.
- ☐ Helping financial leaders sleep better at night.
- ☐ Freeing finance teams from endless, draining manual tasks.
- ☐ Watching CFOs step into their true role as strategic leaders.
- ☐ Being the trusted partner in their most high-stakes moments.
- ☐ Building solutions that bring relief, not more burden.

## PART THREE - BRAINSTORM YOUR CORE PURPOSE

Jumping off from the questions answered above, complete the sentence. The core purpose of [company name \_\_\_\_\_] is to...

- ☐ ...free financial leaders from complexity by turning data into clarity, confidence, and strategic impact.
- ☐ ...empower CFOs and their teams to move beyond spreadsheets and lead with confidence.
- ☐ ...deliver truth and trust in every number so leaders can make bold, informed decisions.
- ☐ ...transform the chaos of financial data into order, insight, and opportunity.
- ☐ ...give finance professionals peace of mind and time back to focus on strategy and growth.
- ☐ ...set a new standard of excellence in financial reporting—accurate, elegant, and inspiring trust.
- ☐ ...change the role of finance from reporting the past to shaping the future.

## PART FOUR - DRAFT and FINALIZE YOUR CORE PURPOSE

Go ahead and write down your drafted Core Purpose below:

**Our Core Purpose is to free financial leaders from complexity by turning data into clarity, confidence, and strategic impact.**

Insert your Core Purpose into your [4-Page Growth Plan™](#).

## PART FIVE - The Litmus Test

Now that you have drafted your Core Purpose, it is time to make sure it passes the four-part litmus test below.

**YES**

**NO**

**1. IT IS ALREADY TRUE.** This is not something you aim to be in the future. This is a declaration of what your current and ongoing purpose is. You can say it now and know it to be true. It is not something you strive to become. Your company already has this purpose.

**YES**

**NO**

**2. IT STATES WHO YOU ARE AND IMPLIES WHO YOU ARE NOT.** Declaring a core purpose heralds what you are and will be. It is a strategic choice. And in the process, helps you know what you are not, and will direct what you do and don't do now and in the future. It should be open enough to allow your organization to grow and evolve, while also maintaining a boundary about the work that isn't for your company to do.

**YES**

**NO**

**3. IT INSPIRES THE BEST IN EVERYONE.** The words should do more than just state what you do. It should move and inspire your team to bring forth the best in them each and every day.

**YES**

**NO**

**4. IT STANDS THE TEST OF TIME.** It is something you know will be important for your company both now and 100 years from now.