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# **First Things First**

## **Determine Your Purpose and Core Values**

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## DETERMINE YOUR PURPOSE AND CORE VALUES

Perhaps a bit surprisingly, my suggestion about where to begin with your digital content development activities doesn't start with a recommendation of blogging platforms, production technologies or social networking platforms. Rather, it begins with paper and pencil to determine your core values and to articulate your purpose for creating digital know-how to begin with.

The road to content and blogging-consistency, social media marketing success, and so on is littered with good intentions. But, how many times have you gone down one path with all the gumption and content creation mojo only to find yourself a few weeks further along – and off course? Sometimes serendipity comes into play and it works out. But, more often than not, we forget where the path was supposed to lead us. Worse—many of us start the journey with nary an idea of what a “successful journey” is supposed to look like.

Taking a moment to understand and articulate your purpose before getting started will help you maintain consistency and interest in all aspects of your knowledge content-creation and social media activities. They are the powerful, yet intangible “things,” that give you confidence to engage others with genuine interest and transparency from the point of initial contact in the social sphere to the point of sale in the marketing funnel.

## PURPOSE STATEMENT DEVELOPMENT WORKSHEET

Social media and online content creation has endless benefits in expanding your circle of influence, promoting your brand, gaining new customers and even conducting actual transactions. However, it comes at a price: *time*. So, before you start, make sure you have a clear understanding of:

- *who* it is you intend to create content for,
- *what* returns you expect to achieve, and
- *why* it is you want to use social media and online distribution channels for engagement (vs. other channels of communication).

Armed with answers to these questions, you'll have a better idea of *where* to invest your time online.

So it is that you want your online content creation and social media strategy to begin with a paper-and-pencil exercise to develop a *statement of purpose*.

Armed with that, you'll be in a better position to evaluate which platforms are the right ones in which to invest your time.

### Getting Your Fix

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In the world of nautical and aerial navigation, mariners and aviators engage in determining something called a position *fix*. Or, quite simply a "fix."

In a nutshell, a *fix* is an hourly reading mariners and aviators take to determine their position. But, rather than rely on instruments *inside* their ship to determine this position (called a “dead reckoning” position), a *fix* is a special type of procedure that uses reference points *outside* the ship to determine position. For example, celestial bodies, mountain peaks, lighthouses, sea buoys, satellites, etc. would all qualify as reference points for a *fix*.

The point here being that these professionals determined it was important to occasionally—and regularly—employ a disciplined approach in comparing the ship’s position against outside reference points to confirm whether or not they were still on the course they initially intended to follow (called a *flight plan* or *intended track*).

It’s in that way, that *purpose* and *values statements* (the latter I discuss in another worksheet) serve as your flight plan. And, by periodically revisiting your initial statement and comparing it with recent activities, you basically give yourself an opportunity to plot a personal *position fix* to make sure you’re still on track with your initial intentions.

In the next few pages, I’ll walk you through the basic steps of developing a *statement of purpose*.

## Purpose Statement Steps

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### Step 1: *What is it that you do?*

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Unless you've already got this one locked, try approaching this as a brainstorming activity. With paper and pencil in hand, take no more than five minutes to quickly list all the things you do in your business. For example, some of my real estate friends might come up with:

- I negotiate contracts
- I counsel homebuyers about the home buying process
- I creatively market homes to get the best price for my selling clients
- I serve my clients and their families
- I create long lasting relationships

After you've created your initial list, make note of some of the **action words (verbs)**. These action words give a clue about the things you give attention to in your business without necessarily thinking about it. For example, from the list above you might make note of the following action words:

- I **negotiate** contracts
- I **counsel** homebuyers about the home buying process
- I **creatively market** homes to get the best price for my selling clients
- I **serve** my clients and their families
- I **create** long lasting relationships

## *Step 2: For **whom** do you do what you do?*

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In this step, take another look at your list and pick out the **nouns** representing people or groups. Don't be shy about adding to your list during this step if something new comes to mind. Using our example above, your refined list might look like this:

- I negotiate contracts (With whom? Answer: With **lenders, buyers, sellers**, and their **agents**)
- I counsel (whom?) **homebuyers** about the home buying process
- I creatively market homes to get the best price for (whom?) my **selling clients**
- I serve (whom?) my **clients** and their **families**
- I create long lasting relationships with (whom?) **agents** and **clients** alike.

As afterthoughts, the list above might jog your thinking to also consider the following “whom-type” objects, as an example:

- Other agents
- Investors
- Generation-Y buyers
- Baby-boomer sellers

## *Step 3: **How** do you do what you do?*

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Continue the process of refinement above. Only this time, focus on **descriptive words** (adjectives) you'd use to help you now describe your **unique** approach in service of the “whom” objects from Step 2. Examples here might include:

- **Skillful** and **ethical** negotiation
- **Consultative** philosophy of service
- **Seeking first to understand** my client's situation **before I seek to be understood.**

#### *Step 4: Assemble the Pieces*

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Now, as the next to last exercise, try forming a few sentences using some of the **verbs** (from Step 1), **nouns** (from Step 2) and **adjectives** (from Step 3).

This part of the exercise will be a little like trial-and-error. You'll likely follow an iterative process as you combine words into meaningful statements that ultimately resonate with what you feel are true about the value you and your business add to the community. For convenience, I included a few examples in a later section.

#### *Step 5: Write it down, man!*

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With the first four steps complete, write your purpose statement on a clean sheet of paper. Then keep it in front of you at all times.

Let your purpose statement serve as your guiding principle when you're asked – either by friends, colleagues or that other distracting part of yourself – to deviate from your path by “taking a look” at some cool new online gadget, new social network or shiny new automation tool because of some wonderful new shiny promise, or other.



With each new invitation, ask yourself if that gadget fits with the vision you hold about your customer and the purpose of your business. This vision becomes an important tie-breaker when you later find yourself wading into the online social stream and begin experiencing the fuzzy logic of automation shortcuts and costly content development tools. Interestingly, from an online social perspective, these distractions are of the type that are sometimes vilified in the social web as they tempt you to consider automation in *building lots of followers quickly, automating your Twitter posts*, or to blindly broadcast your digital content far and wide with all sorts of sales and marketing Franken-speak.

The purpose of your involvement with digital and social media will significantly dictate *how* you engage your community, *which* networks you elect to participate in, and *what* kind of information or media you choose to create.

By having a clear idea of *what you do, how you do it, and for whom* you do what you do, you'll be better equipped to use online and social media channels as enabling tools for your business, rather than as a crutch for it.

## Sample Purpose Statements

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### Example #1

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By way of example, here's one version of the purpose statement you might write down as a result of the Steps we made above:

**"I creatively market homes to get the best price for my home-selling clients in the Orange County, CA area. I counsel my clients and prospective clients about the home buying and real estate investment process while serving the real estate needs of their families after the transaction is complete in order to create long lasting and referable relationships."**

**Suggestion:** Let's pretend for a moment that the purpose statement above is my own. If that were the case, can you see how its specificity now helps me focus on the following insights:

- I want to seek out groups and communities where questions about the topic of real estate are likely to be discussed.
- Based on that insight, I might do the following:
  - Create an account on the social network at *Trulia* (trulia.com) and filter for consumer questions in *Trulia Voices* that correspond to my geographic area of service)
  - Set up an account on the *LinkedIn* social network (LinkedIn.com) and conduct a keyword search within *LinkedIn Answers* for active Questions having various real estate-related keywords and phrases
  - Create a *YouTube* account with *metatag*, *keyword* and *description* text that helps my YouTube page be found through search engines that home buyers,

- home sellers and real estate investors are likely to use when searching for homes in my area
- With my YouTube account, answer questions I find from prospective customers in Trulia Voices and LinkedIn Answers by using a 2- or 3-minute video to answer the question. Then post a link to my video-response in the Answer section of the respective question in Trulia Voices or LinkedIn Answers

### *Example #2*

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Credit: Debbie Calvin, Keller Williams Realty (DebbieCalvin.com)

**“To serve families** and create long standing relationships with people for their real estate needs.

To ensure that every **family** who has entrusted me as their **Realtor** is provided with real estate **services that reflects knowledge, integrity and commitment.**

To continuously **understand how important my job is in the lives of others** and to **“awe” them with my performance** while **making the most of their hard-earned equity.**

To always **remember that not only is a home most likely the single largest investment** of the **average family**, but a home is **where families build their lives.**

**To always remember that my job is that important.”**

**Suggestion:** The social networking and social media guidance implied by Debbie’s purpose statement above would suggest the same ones I listed in Example #1. But, perhaps with the addition of the following ideas:

- Set up automated search alerts on Google to deliver search results with instances where people in the social web post anything about family life in Debbie’s area of service

- Create a community blog that talks specifically about life in St. Michaels (or Orange County, whatever)
- Start a blog daily series that lists the “365 things to do in St. Michaels” (or 10 things to do, or 20, you get the picture). Then post one article each day for the next 365 days (or 10, or 20... you're with me, right?)

### Example #3

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Credit: Suite101.com

([http://business-resources.suite101.com/article.cfm/sample\\_mission\\_statements](http://business-resources.suite101.com/article.cfm/sample_mission_statements))

“My mission is to champion others to grow personally, professionally, emotionally and spiritually by using my compassion, my unique perspective, and my belief in others’ inherent goodness, integrity, and enormous potential.”

**Suggestion:** In this personal mission statement, I envision someone who might benefit from participating in blogs like zenhabits.net or various spiritual groups or fan pages on Facebook and similarly-themed networks.

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### Your Purpose Statement Is Your Compass

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Once you’ve finished defining your purpose statement, don’t rest on your laurels. Print it out and keep it with you. Clip it to the inside front page of your notebook, tack it to the wall at your desk or copy and paste it into the Mission section of your business plan.

Whichever way you choose to do it, keep your purpose statement in a place where you can handily reference it any time. Then, revisit it quarterly. That will serve as a good periodic checkpoint—or *fix*—to compare whether or not the activities you’ve been

engaged in during the last quarter still align with what it was you said you initially intended at the beginning of the quarter.

## ABOUT MEL



**Mel Aclaro** develops online learning programs. He writes regularly on the ScreencastingWizard.com blogsite. He's expert in developing online training and social digital content using web video and flash-based *screencasting* technologies.

Mel works with corporations to create online learning programs. He has also worked with speakers and authors to transform their live content for delivery over the web. And, through his efforts on his blog, ScreencastingWizard.com, he helps his readers leverage his experience to transform their personal professional-knowledge for delivery over the web.

Mel is co-author of *The Swanepoel Social Media Report: A Social Media Field Guide For Real Estate Professionals*. He has also authored numerous eBooks, videoBooks, and online courses spanning industry verticals including: medical billing, real estate, hospitality and the financial service industries. He's currently working on a new book titled: Digital Know-How. Subscribe to his newsletter on ScreencastingWizard.com to be notified when it goes live.

Expert in the use of screencasting and other rapid eLearning development tools, professional audio/video editing, and the application of new media and online communities to enhance learning, Mel is distinguished as a thought leader for social content creation and online education delivery models.

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