

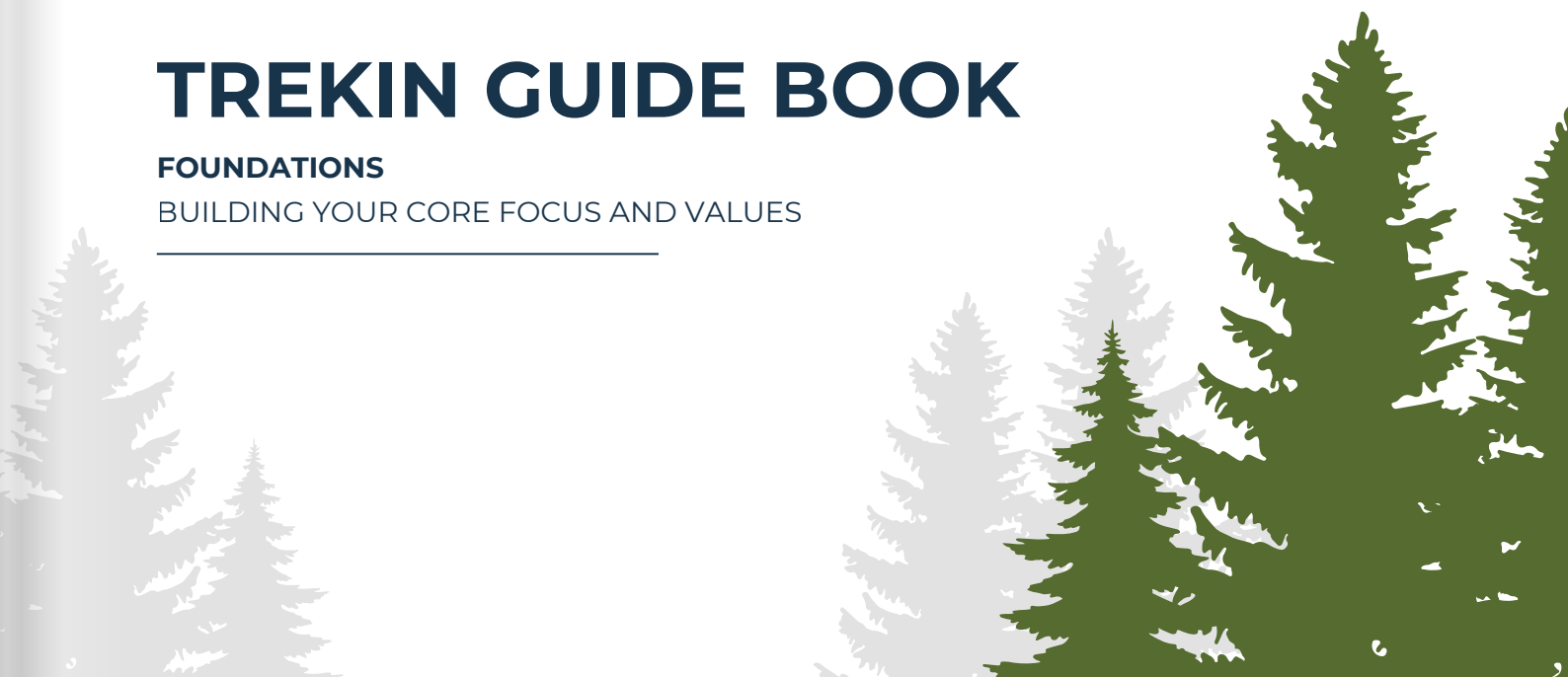


TREK INSTITUTE
A BASE CAMP CO-OP FOR SUCCESS

TREKIN GUIDE BOOK

FOUNDATIONS

BUILDING YOUR CORE FOCUS AND VALUES





BUILDING CORE FOCUS AND VALUES

THE FOUNDATION OF A PURPOSE-DRIVEN BUSINESS

Every business has clients and processes, maybe even some high-level goals. But not every business has true clarity. Clarity is what transforms scattered effort into focused progress. It is the difference between reacting to whatever comes next and moving forward with intention. And clarity begins with two essential elements: **Core Focus and Core Values.**

These foundational pieces shape how the team shows up, how decisions are made, and how consistency is maintained, not just in the advisor role but across every member of the business. Before goals can be set, the business must first understand what it stands for and what it is collectively working toward. Without this understanding, goals become disconnected, client experiences become inconsistent, and team alignment becomes challenging.

Your Core Focus and Core Values are what bring unity to all that follows. They become the lens through which you evaluate opportunities, structure your operations, select your clients, and define success.





Understanding Your **CORE FOCUS**

Your **CORE FOCUS** is your “why” behind the business. It is the purpose that fuels the work you do and guides the direction you take. It goes beyond the services provided and looks deeper into the meaningful impact you want to have on the people you serve.

In advisory businesses, it is easy for daily tasks to overshadow purpose. Without a shared understanding of why the business exists, decisions become reactive, messaging becomes inconsistent, and the experience both internally and externally, becomes fragmented. A clear Core Focus aligns the team, strengthens communication, and provides direction for future planning.

A strong Core Focus should be concise, memorable, and meaningful. It should reflect the heart of the business and give the team a shared sense of purpose, regardless of role.

What a Core Focus is NOT

It is important to remember that a Core Focus IS NOT a slogan, a marketing tagline, or a list of services. It is not meant to be clever, technical, or comprehensive. Instead, it is meant to be grounding. It is meant to be a guiding statement that can be used when evaluating new ideas, setting goals, navigating decisions, and engaging with clients.

For example, “*We provide full-service financial planning,*” is NOT a Core Focus. It describes what you do, not why you do it. A Core Focus speaks to the purpose behind the service, such as:

“We help individuals make confident, informed financial decisions throughout life’s transitions.”

This purpose-driven statement better reflects the identity of the business and resonates across all roles within the team.

Exploring Your Core Focus

Establishing a Core Focus is a process that shouldn’t be rushed. Before defining it, the team should reflect on the deeper meaning behind their work and what the business is trying to accomplish. Consider these thought starters as a guide:

- What impact do we want clients to feel after working with us?
- What motivates our team to show up each day?
- What long-term outcomes do we want to support for the families, professionals, or communities we serve?
- What does our business consistently do well – even when things get busy?
- What qualities, intentions, and themes show up repeatedly in our interactions with clients and with one another?



Understanding **CORE VALUES**

Every business has a culture, but not every business has a intentional culture. Core Values ensure that the team operates with shared expectations rather than relying on individual interpretation.

While the Core Focus defines why the business exists, Core Values define how the team behaves. Values set expectations for conduct, communication, professionalism, and collaboration. They reinforce the internal culture of the business and directly influence the client experience. Values should not focus on aspiration, rather they should focus on consistency and should reflect the behaviors already present when the team is at its best.

Behavior Shapes Experience

Core Values influence every day-to-day interaction within the business. When they are defined and embraced, the business becomes more cohesive, efficient, and enjoyable to work in. When they are not defined, the business risks inconsistency, misalignment, and frustration among team members.

Core Values Support:

Communication: Values create shared expectations around timeliness, clarity, and professionalism – both internally and externally.

Client Experience: Values shape how clients are welcomed, supported, and educated. They bring consistency to the client journey.

Team Collaboration: Values guide how team members work together, resolve challenges, and share responsibilities.

Hiring and Leadership: Values help define what “the right fit” looks like and ensure that new hires support the culture rather than disrupt it.

Accountability: Shared values allow the team to navigate challenges more objectively, as expectations are clearly defined rather than assumed.

Identifying Core Values

To identify Core Values, consider the behaviors that support your team’s best work. These reflective questions will help bring clarity:

- What behaviors consistently support our team’s success?
- What actions create the most positive experiences for clients?
- When the team is performing at its best, what qualities are most evident?
- Which behaviors strengthen collaboration and trust within the team?
- What expectations do we want to uphold regardless of growth or change?



CASE STUDY

The Cost of Operating Without Clarity

Horizon Peak Advisors had a strong reputation in their community. Clients trusted the business, and the team had grown steadily over several years. But as the business expanded, something shifted. Team members began approaching client situations differently, decisions were made inconsistently, and internal communication started to break down. The problem wasn't lack of effort. It was lack of alignment.

Their mission statement had been written years earlier and no longer reflected the direction of the business. Their values were a short list buried in an old onboarding packet that was rarely referenced and seldom discussed. The result was an unintentional culture where everyone operated according to personal preference rather than shared standards.

Identifying the Problem

The turning point came when a long-term client expressed confusion about the different experiences they received depending on who they spoke with. The advisor realized the inconsistency wasn't a procedural issue, but a foundational one. The business lacked clarity at its core.

The Rebuilding Process

Before creating new goals or refining workflows, Horizon Peak stepped into the foundational work of defining their Core Focus and Core Values. Through team discussions and reflection, they surfaced themes that had been present all along:

- Their greatest strength was guiding families through complex planning with reassurance and clarity.
- The team valued proactive communication, thoughtful decision-making, and follow-through.
- They wanted to build a culture based on respect, collaboration, and reliability.

Within months, internal communication improved, workflows stabilized, and the client experience became more consistent across roles.



The Result

The business established a new Core Focus:

“We support families and professionals with clarity, partnership, and long-term direction.”

Their Core Values became the behaviors they were committed to living each day:

- **Clarity** in communication and education
- **Reliability** in follow-through
- **Respect** for clients, team, and process
- **Collaboration** across roles

Within months, internal communication improved, workflows stabilized, and the client experience became more consistent across roles. The team reported greater confidence, reduced friction, and a shared sense of direction that stemmed from the clarity created in this foundational work.

Key Takeaways

A clear Core Focus anchors the business and gives direction to decisions, goals, and client experience.

Core Values set expectations for how the team behaves and collaborates every day.

Together, these elements create alignment across roles, improve consistency, and strengthen the culture.

Before goals can be achieved or ideal clients defined, the purpose and values must be clear.