



# CORE

The **Single Organizing Idea** Playbook

2025 DIGITAL EDITION

NEIL GAUGHT

The SOI® toolkit, including over 40 detailed diagrams and step-by-step explanations you can follow immediately to change your business for good

## PRAISE FOR CORE & SOI

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“The CORE Playbook provides a simple, direct, paint-by-numbers guide to identifying, creating, implementing and measuring the impact of a core purpose for almost any organization”

Rob Markey, Co-Founder Net Promoter System (NPS)

‘*CORE: The Playbook* is a breakthrough practical guide that global business leaders will use to become the vanguards for the world we want. And I fully expect it will become a critical resource for schools educating the global managers of today and the future.’

Dr. Sanjeev Khagram, Dean & Director General,  
Professor of Global Leadership Thunderbird School of  
Global Management, University of Arizona

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‘The SOI toolkit is a way that businesses can embark on a journey toward mutual prosperity that is both simple and scalable. Now, more than ever, solutions that encompass the need for sustainable and ethical business are key – the SOI is such a solution.’

Rajiv Joshi, Former MD of The B Team

‘21st-century problems need powerful and practical 21st-century solutions to escalate progress, and Single Organizing Idea is one of them.’

James Wallis, Co-founder of IBM Blockchain

## PRAISE FOR CORE & SOI

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‘CORE: The Playbook is just how a book ought to be in the 2020s: short, accessible, original and full of clear practical guidance that enables companies to make the radical but necessary changes that the planet and people urgently need. For anyone who’s starting to feel that the new corporate agenda is too much talk and not enough action, this is the remedy.’

Simon Anholt, policy advisor and author

‘Finally, a practical guide that not only shows you how to put purpose at the core of your business, but also provides the measurement tools to prove you’re delivering sustainable prosperity for all.’

Chip Conley, *New York Times* bestselling author, strategist and entrepreneur

‘The SOI uses a structured methodology that helps teams hold the core purpose central to all their actions, relationships and communications. B Corps, and any organisation that is serious about being led by their purpose to do more than just seek profit, could be helped by this book.’

Katie Hill, Executive Chair, B Lab Europe

‘As we enter a decisive decade companies need to shift from ambition to action. The CORE Playbook is a practical guide for businesses to do just that.’

Ben Kellard, Director of business strategy, the Cambridge Institute for Sustainability Leadership

## PRAISE FOR CORE & SOI

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‘There’s an urgent need for tools to help small and medium sized business to pivot and change for good and here is a practical resource to help them do just that.’

Nigel Topping, High Level Climate Action Champion, UNFCCC COP26

‘An essential guide to building a 21st-century business where everyone feels great about contributing to a more meaningful and sustainable future.’

Patrick Grant, celebrity fashion designer and founder of Community Clothing

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‘The most important lesson I have learned from my 50+ years of working with organisations on their values and culture is the necessity for a comprehensive cut-through accountability mechanism that supports the embodied living of values and the behaviours that demonstrate them.

In CORE: The Playbook, for the first time, we have an approach and a tool with that power.’

Gunther M Weil, Ph.D., Co-Founder Value Mentors

‘SOI has so much more potential to make a difference than a simple purpose.’

Charles Handy, author, philosopher, organisational behaviour specialist and top 50 business thinker

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# INTRODUCTION

In a time of increasing uncertainty, disconnection and distrust, purpose-led businesses offer something that's in short supply: **coherence, clarity and conviction.**

When I first published *CORE: How a Single Organizing Idea Can Change Business for Good* back in 2018, I had already spent the best part of two decades exploring how purpose could be made practical. In 2020, I followed it up with the original *CORE SOI Playbook* – a hands-on guide built to help business leaders move from inspiration to implementation.

## Much has changed since then.

Geopolitically, socially, technologically – the landscape has shifted in ways that would have been hard to fully predict just five years ago. The shocks and aftershocks of a global pandemic, deepening climate disruption, rising economic insecurity, increasing polarisation and now the proliferation of generative AI, have all accelerated the sense that the systems we've relied on are overdue for serious rethinking.

The stakes are higher. The urgency is greater. And the opportunity to do something genuinely different – and better – has never been more real.

That's where this Playbook comes in.

## A human approach to a changing world

There's no shortage of bold declarations about how businesses can change the world. But there's still a distinct lack of practical guidance about how to actually do it – especially in a way that brings everyone along, avoids the traps of superficial “purpose-wash” and builds something that's not just inspiring, but credible, sustainable, and measurable.

## This playbook exists to fill that gap.

It sets out a clear, flexible and human approach to aligning your business around a *Single Organizing Idea* – your SOI. It's about bringing commercial and social goals together into a single strategy that enables your business to thrive, not in spite of the world's challenges, but by helping to address them.

And that's not just a nice idea. It's fast becoming a business imperative.

AI can now write content, code software, crunch data and simulate scenarios faster than any of us can blink. Supply chains are more complex – and more vulnerable. Consumers and workers are more vocal, more values-driven and more mobile than ever. Investors are demanding clearer, longer-term thinking. The question isn't *if* your business needs to evolve, it's *how quickly*, and *how intentionally*.

That's what this Playbook is here to help you do. But a word of caution: while this book shows you how, it doesn't mean you should go it alone.

## Why you still need a human

Over the last 25 years I've worked with leaders in global corporations, governments, tech startups, NGOs and everything in between. I've seen up close the difference that clarity of purpose — when made real through strategy, systems, culture and leadership — can make. But I've also seen what happens when businesses try to shortcut the process, or treat purpose like a bolt-on rather than a way of doing business.

This Playbook is based on lived experience, tested tools and proven methodologies. But like AI — which can write essays and generate insights, but can't replace the judgement, empathy or wisdom of a real person — this Playbook is only part of the solution.

You still need the independence and challenge of an experienced advisor. Someone who can see what you can't, ask the questions that matter, and bring the outside perspective that helps you stay honest and stay focused.

You need a human — because this is ultimately about humans and the kind of future we want to build together for us and those that come after us.

## The case for purpose has never been stronger

**There are those who say purpose is a luxury — or just 'woke' fluff. That now's the time for survival, not idealism. But I'd argue the opposite.**

In a time of increasing uncertainty, disconnection and distrust, purpose-led businesses offer something that's in short supply:

**coherence, clarity and conviction.** They know who they are. They know what matters. And they know how to bring people together to make a difference.

More than ever, we need businesses that are led by ideas that matter — not just ideas that sell. That's what a Single Organizing Idea makes possible.

## This is a starting point, not an ending

**This Playbook will walk you through every stage of the journey — from identifying your SOI, to aligning your business around it, to measuring the impact you make.**

It's full of practical tools, detailed methods, and real-world examples. It's designed to be collaborative, adaptable and transparent. But this is not a plug-and-play system. There are no shortcuts, no magic words or quick fix that will do the hard work for you.

This is a **starting point**, not an ending. It's an invitation to roll up your sleeves, bring others with you and take the next steps in building a business that's fit for the future — because it helps shape a better one.

If that's what you're here for, you're in the right place.

Let's get started.

**Neil Gaught**

Auckland, April 2025

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## CHAPTER 1 :

# SOI 101

**SOI explained.** In this section, you will find all you need to know about SOI, what it is, how it can help and what's needed to get started.

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SINGLE ORGANIZING IDEA

# 1.1 BEYOND PURPOSE

Let's be clear from the start: having a purpose isn't going to save the world — and it certainly won't save your business.

Twenty years ago, when I was working for WPP and the world's largest branding agency, I had a front-row seat to the birth of brand purpose. "A purpose that will unite over 100,000 people" was the grand declaration made to his staff by its CEO Lord John Browne when he repositioned BP to stand for a bold new purpose: Beyond Petroleum.

With that purpose came a shiny new set of values. But just like the purpose itself, they turned out to be part of the emperor's new clothes. Asked about BP's values after the third of three major disasters — which ended in the largest oil spill ever recorded — one employee told Fortune magazine in 2006, "The values are real, but they haven't been aligned with our business practices in the field."

BP's purpose was a masquerade. At its heart wasn't a mission to genuinely move beyond petroleum, for the benefit of people and planet — it was the same old relentless pursuit of

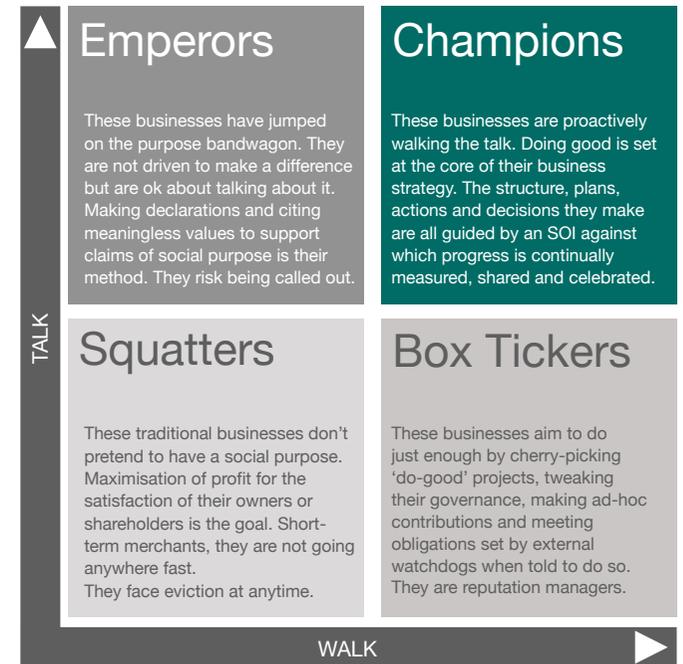
growth at all costs. The devastation that addiction created is powerfully portrayed in the film *Deepwater Horizon*.

BP is just one of many businesses that talk about having a purpose that supposedly makes them good for the world. But let's be honest — most are more taken with the idea of purpose than the reality of delivering on one. Growth still rules. Power stays at the top. Targets are short-term. And progress is almost always defined by financial performance.

To their credit, some of these purpose-inspired companies do go beyond compliance. A few even fund social initiatives and good causes, sometimes inventing their own. But this kind of purpose isn't woven into their strategy — and it's rarely the reason they exist.

In recent years, as global trust fractures, technology speeds ahead and stakeholders demand more, purpose has become a kind of life raft that many big businesses cling to. But as you'll soon see, a business with a purpose made real through a Single Organizing Idea (SOI) at its core isn't just hanging on. It's built to

navigate — and lead — in a world that's only getting more complex.



**Walking the talk** There is a big difference between what gets said and what gets done. Turning a blind eye, not totally committing or just doing enough is a risky business.

Purpose agnostic	Purpose influenced	SOI aligned
<p>Pyramid, silo structure</p> <p>Top-down control</p> <p>Supply-chains</p> <p>Short-term profit focus</p> <p>Employee indifference</p> <p>Efficiency and process driven</p> <p>Reputation management</p> <p>Sales and marketing communications aimed at winning customers</p> <p>CSR 'bolted on'</p> <p>Success is financial</p>	<p>Pyramid, silo structure</p> <p>Top-down control</p> <p>Supply-chains</p> <p>Short-term profit focus</p> <p>Employee engagement</p> <p>Brand comms and CSR combine to win preference through selected customer 'experiences'</p> <p>Brand promises and brand values drive 'surface' culture</p> <p>'Win-win' projects make money</p> <p>Sophisticated market share measuring tools</p> <p>Success is financial</p>	<p>Flat, networked ecosystem</p> <p>Self-organising operating system</p> <p>Value-chains</p> <p>Long-term thrive focus</p> <p>Employee fulfilment</p> <p>Call to action at the core</p> <p>Encourages and facilitates a regenerative, circular ecosystem</p> <p>Deep, holistic commitment to meaningful values</p> <p>Collaboration culture</p> <p>Sophisticated alignment/impact measuring tools</p> <p>Success is sustainable</p>
Fit for little	Fit for some	Fit for all

**Stuck in the middle with you.** Many companies state that they have a purpose but the evidence shows that not many of them act on it.

## 1.2 THE POWER OF AN SOI

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SOI has three qualities accurately described in its name. It does exactly what it says on the tin:

1. **Single:** one
2. **Organizing:** systematically coordinated
3. **Idea:** concept that benefits all

### One single strategy

I first learned about strategy during my time in the military. My many experiences in business — and my evolving view of the world — have added some colour over the years, but they haven't changed my core belief: strategy means FOCUS.

At its heart, strategy is straightforward. But it's often wrapped in layers of mystery, turned into something abstract and sold as an enigma by expensive consultants. That's one reason so many SMEs avoid it altogether — they assume they can't afford it or that it's beyond their reach.

But as you'll discover in this book, you don't have to buy a strategy. And when you have the right one — a strategy that truly belongs to your business — it can make a world of difference to

your future, and, if you choose, to the world around you.

Here's how it goes: to make progress, I need to get from point A to point B. By getting from A to B, I achieve my objective. That's it. Strategy is simply a plan of action. And when that plan is communicated clearly, it becomes a call to action.

Of course, arriving at your objective depends on having the right strategy. How to get to that point is explained later in the book — spoiler alert — and it's more accessible than you might think.

For now, here's what matters:

First, strategy is simple. And the simpler, the better.

Second — and this is crucial — your business needs to focus on one single strategy if it's going to thrive in the future.

That might sound unrealistic. But the truth is, while some SMEs are drifting without any strategy at all, others are trapped trying to serve two competing ones. It's no wonder they feel stuck.

At the other end of the spectrum, many large businesses are struggling to stay fit for the future. Some are still led by the single, outdated objective of making money at all costs. Others are attempting to juggle financial performance with pockets of the organisation pushing for change — and often pulling in different directions. That split creates tension, confusion, and more than a few public missteps.

A Single Organizing Idea (SOI) ties both the economic and social objectives into one coherent strategy. The result? A business that's not only commercially viable, but also relevant and rewarding for the people within it.

SOI is about full commitment. It's about getting everyone aligned behind a single plan of action, with clear measures of progress. It's not about ticking boxes or throwing around feel-good slogans. It's not about saying you're “doing well by doing good.” It's about actually getting on with it — and doing it well.



**The beauty of a single strategy** A Single Organizing Idea (SOI) ties both the economic and social objectives of your business into one coherent strategy.

## 1.3 SELF-ORGANISING SYSTEM

### Systematic coordination

The way traditional businesses are organised limits their potential — and their ability to meet the challenges posed by climate change, growing inequality and other global issues captured in the UN’s Sustainable Development Goals (SDGs).

If you want to focus your business on helping solve problems that actually matter, you’ll need to rethink more than your strategy — you’ll need to rewire how your business is organised and operated.

That’s what the second element of an SOI does. It defines how your business works, how it’s structured and how decisions are made and measured.

In the typical hierarchical model, people and functions are arranged to serve the needs and desires of those at the top — most notably the CEO. With the average CEO sticking around for just five years, and their incentives still largely tied to short-

term financial results, it’s easy to see how internal silos emerge and why so many businesses struggle to deliver long-term, joined-up progress.

The SOI flips this dynamic. It replaces the CEO as the organising principle and redistributes power across the business and its broader ecosystem. It doesn’t just flatten the pyramid — it reshapes the culture. It frees people to pursue a shared, sustainable objective that comes from the heart of the business, not the personal agenda of whoever happens to be in charge at the time.

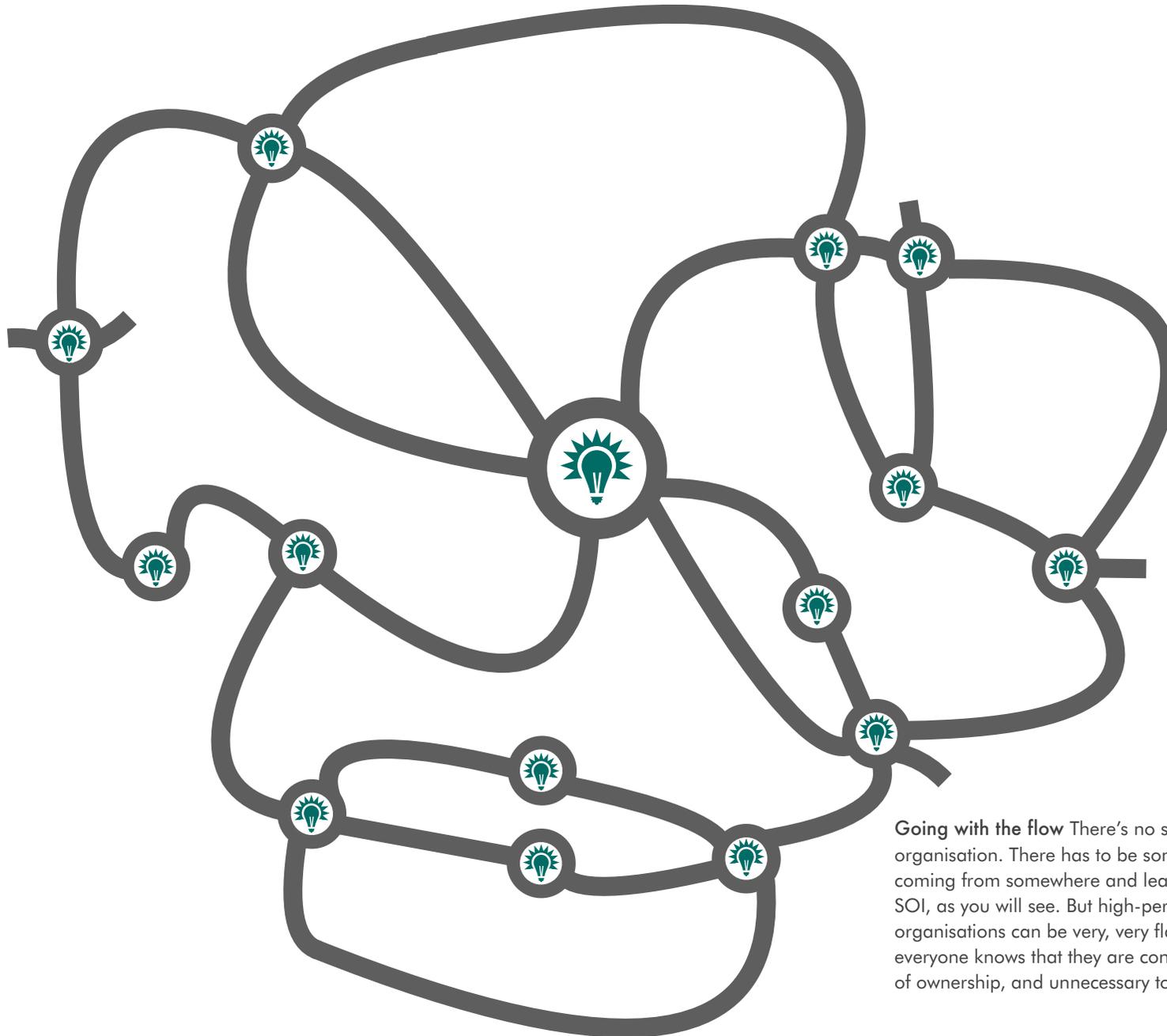
A useful way to visualise the difference between an SOI-led business and a traditional one is to think about roundabouts versus traffic lights (see graphic on the next page). A roundabout system encourages flow, coordination and trust — it’s about shared responsibility. A traffic light system, on the other hand, is centralised, rigid and

controlling — it tells you when to stop and when to go, whether it makes sense or not.

But let me be clear: replacing the CEO as the organising principle doesn’t mean leadership goes out the window. In fact, leadership becomes even more important — but it’s distributed, not concentrated. People in SOI-led businesses don’t wait to be told what to do. They organise themselves around a unifying idea, not under a boss.

## SUSTAINABLE DEVELOPMENT GOALS

Helping put the ball in the net The Sustainable Development Goals address the global challenges we face, including those related to poverty, inequality, climate change, environmental degradation, peace and justice. <https://www.un.org/sustainabledevelopment/sustainable-development-goals/>



**Going with the flow** There's no such thing as a totally flat organisation. There has to be some form of command and control coming from somewhere and leadership is a key component of SOI, as you will see. But high-performing, single-minded organisations can be very, very flat indeed. In such organisations everyone knows that they are contributing, there's a shared sense of ownership, and unnecessary top-down bureaucracy is avoided.



**A holistic solution** Instead of organising around functions, SOI reengineers your business so the functions organise around the SOI, making it less siloed, top-down and more focused.

## 1.4 IDEAS FOR GOOD

### A concept that benefits all

All businesses start with an exciting idea.

The problem is, ideas are fragile. They need looking after. They need to be fed, challenged and nurtured. Too often, that original spark gets buried under the weight of day-to-day operations. The idea that once fired everyone up slowly fades into the background — reduced to a dusty PowerPoint slide pulled out for the occasional corporate offsite.

But it doesn't have to be that way.

The third feature of an SOI is the primacy of your core idea.

An SOI places your idea at the centre of your business — and keeps it there. It turns your idea into a living, working part of your business by making its realisation your single-minded objective. That way, every decision you make, every action you take and every dilemma you face is anchored by the same guiding force: **your idea.**

No matter the size or stage of your business, if your core idea is sustainable — commercially, socially and environmentally — you have the power to not only change your business but change lives.

Great ideas excite people. The best ideas inspire them. They provoke thought, spark action and invite others to join in. They're useful and they're meaningful — they help solve real problems and create real value.

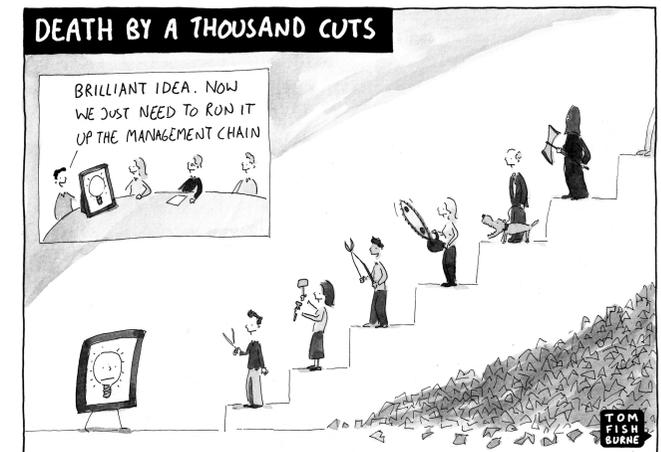
The best ideas endure. They're not shaken by trends, tech, or changes in leadership. They hold firm because they matter — and because they create both impact and value over time.

I've always loved this quote from filmmaker Christopher Nolan:

**“An idea can transform the world and rewrite all the rules.”**

And right now, we need more ideas like that — ideas that challenge outdated assumptions, that do more with less and that create long-term value for both business and society.

Defining an idea that can do that is within reach — and this book will help you find it. It'll also help you rethink how your business operates, so that your idea doesn't just survive — it thrives.



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## 1.5 EVERYONE BENEFITS

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The graphic on the next page shows how aligning your business with a meaningful SOI can improve what you do, attract who you need and deliver better outcomes — all from a single source of focus and intent.

SOI opens the door to a whole range of positive results. Some you'll notice right away; others will build over time. Let's look at one example from each area to give you a sense of what you can expect — both inside and outside your business.

First, internally: your team will quickly sense they're part of something bigger — something that matters not just to the future of the business, but to their own wellbeing and, often, their families'. That might sound a bit over the top, but I've seen it first-hand. I've sat in rooms where people have been moved to tears when they see, clearly and collectively, the SOI they helped shape. When people feel their work has real purpose and direction, it touches the heart — just like those moments of unity we witnessed during the COVID-19 crisis.

Now, externally: while some operational shifts may take time, simply starting conversations about your SOI with customers, suppliers and partners can spark a wave of engagement. People want to connect with something meaningful — and many will offer ideas or adjust what they do to support your direction. Just as powerfully, an SOI quickly reveals who *isn't* aligned. That clarity allows you to part ways with the distractions and double down on the right relationships.

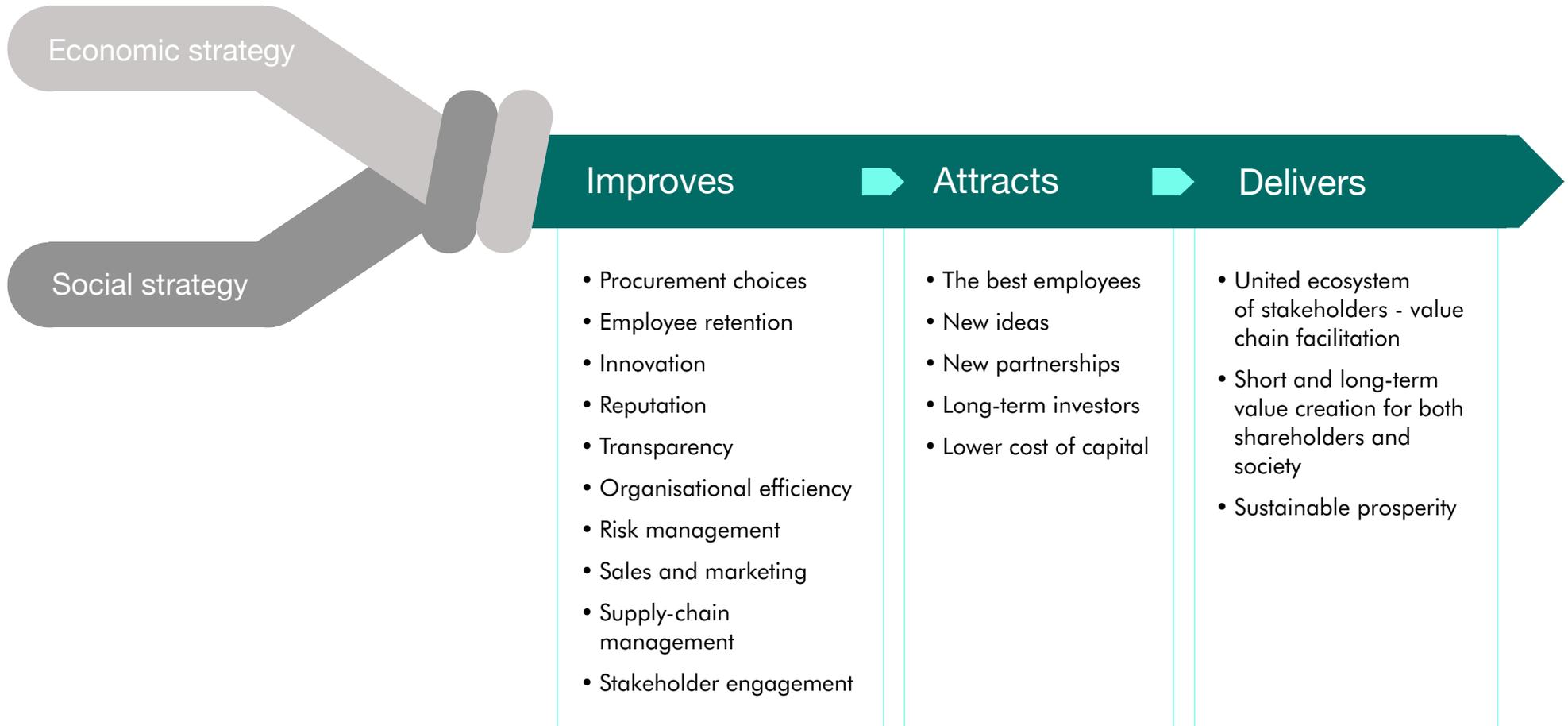
One small business I worked with restructured around its SOI and within weeks, had formed new partnerships, sparked fresh ideas, brought in new people and saved costs. The logic behind an SOI sharpens decision-making — and leads to smarter, leaner ways of working. It touches minds too.

Over time, your SOI — and especially the approach to innovation I'll describe later — will help you and your partners develop new products and services. You'll also stand a stronger chance of attracting long-term investors. These are people who are moving

away from outdated models and actively looking for businesses that can perform *and* endure.

Traditional businesses often define success by growth alone — and chase it at any cost. Growth still matters in an SOI-led business, but the approach is different: it's realised by achieving both commercial success **and** sustainable development. The aim isn't to outspend or overproduce — it's to thrive by focusing on what's needed, not just what's wanted. This mindset doesn't just curb waste — it unlocks creativity and clearer priorities.

And perhaps most significantly: the best and brightest of the following generations see what is going on and aren't chasing a paycheque. They want their work to mean something — to them and to the world. An SOI will attract them. It will benefit them. And it will give them the chance to build careers that make a real difference.



**Going for growth** Traditional businesses often define success by growth alone — and chase it at any cost. Growth still matters in an SOI-led business, but the approach is different: it’s realised by achieving both commercial success **and** sustainable development.

## 1.6 YOUR GUIDING STAR

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Your SOI acts as your guiding star. It becomes the reference point — the touchstone — against which every part of your business and the ecosystem it contributes to, can measure progress, improve performance, and find more efficient ways of working.

An SOI helps you navigate the journey of transforming your business for good. It guides decision-making, helps solve ethical dilemmas and shapes governance policies with consistency and integrity. It prompts people to think more broadly — about opportunities, boundaries, constraints, how they can collaborate better and what they should expect from one another.

As people's understanding of your SOI deepens, so will their commitment to it. The tools and approaches in this book are designed to support that journey — encouraging involvement, sparking ideas and creating moments to celebrate shared progress.

That said, let's be honest: this won't happen overnight. Progress isn't linear and change isn't easy. People respond at different speeds. Some

will click with the SOI right away. Others may take longer to see its value — and some may never engage. In those cases, particularly when self-interest starts to block progress, you may need to make some tough calls and let people go.

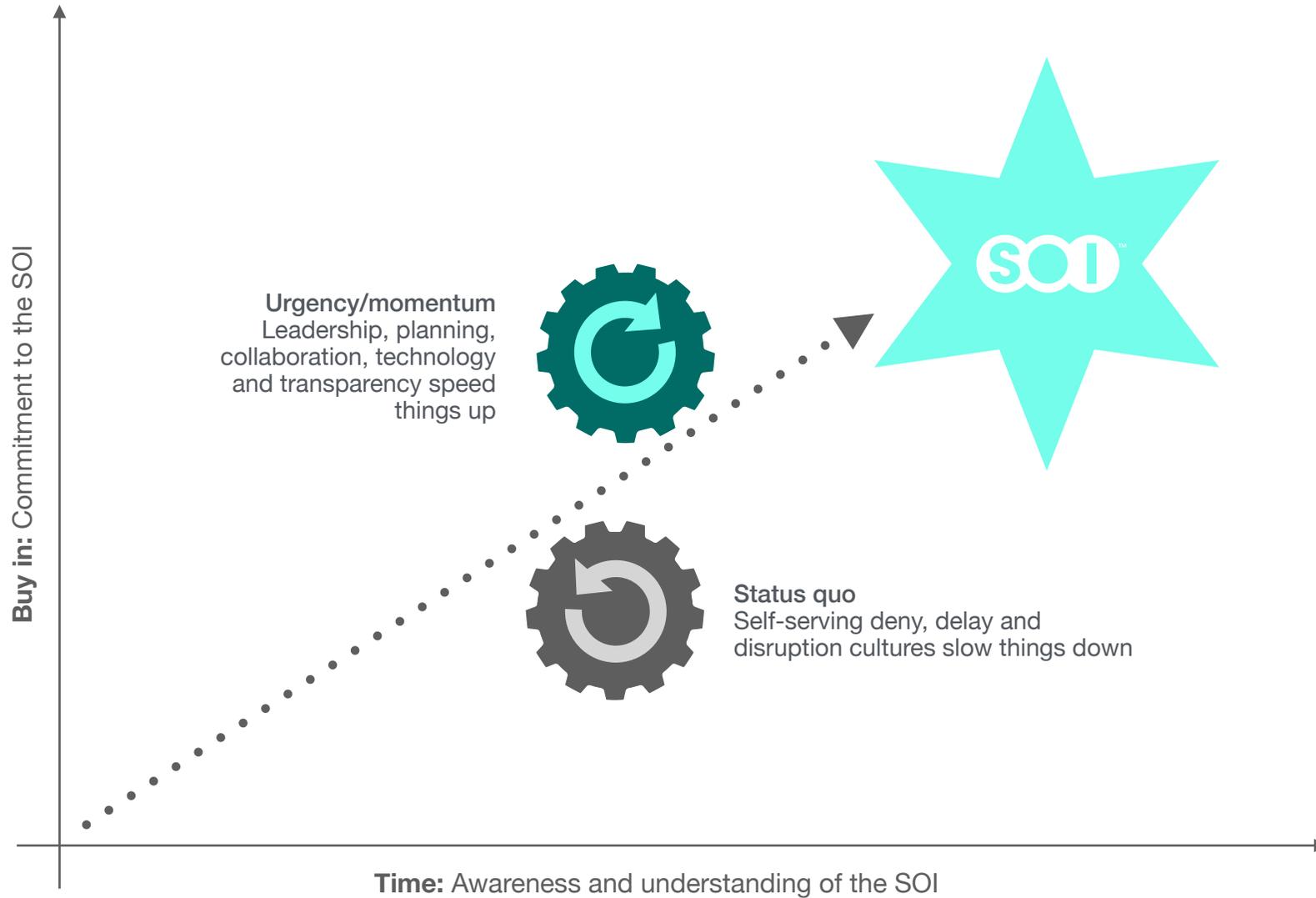
Because here's the truth: SOI is not a silver bullet. Embedding it into your business will take time, courage and leadership. It will challenge long-held assumptions. It will surface resistance. But it will ask you to stand firm — especially when the easier option is to stick with "how things have always been done here."

The good news is that SOI isn't just a guiding star — it's a call to action. The best SOIs are clear, determined and to the point. Those qualities will give your leadership substance and credibility. They'll ensure that whenever you explain what your business is doing and why, your words are grounded in truth and anchored in what really matters.

And here's another piece of good news: even the toughest critics can change. In fact, in my

experience, the loudest defenders of the status quo often become the strongest champions of SOI once its value is proven and long-term potential fully understood.

Measuring progress matters. Later in this book, you'll see that accountability is a central feature of any SOI-aligned business. Understanding where you're going, how fast you're moving and who and what is contributing to that journey isn't just useful — it's essential.



**There are lots of stars in the sky** Choosing the right one will help you navigate towards your objective.

## 1.7 SOI AT WORK - EXAMPLES

Almost any business can change — and be a force for good — if the people running it genuinely want to make it happen.

Granted, if your core business is producing weapons, wrecking ecosystems, or profiting from the exploitation of others, you might find this approach a stretch. In those cases, it's likely you'll have to stick with the usual PR-led purpose spin and hope nobody looks too closely.

But for the rest? The opportunities are real — and far-reaching.

As the examples on the next page show, SOI isn't just for businesses. The thinking behind it has been applied successfully to international NGOs, not-for-profits, one-off projects and even geographic locations.

Size doesn't matter either. New Zealand tech firm **DataTorque** employs fewer than thirty people — yet its work impacts millions globally. By helping small nations strengthen their tax systems and reduce dependence on foreign aid, DataTorque's SOI — centred on *'collective success'* — shapes how they work and why they

exist. It guides daily decisions and long-term partnerships alike.

At the other end of the spectrum, **Catholic Relief Services** is one of the largest international NGOs in the world. Its staff are spread across continents and come from diverse backgrounds — most are Muslim and many hold no faith at all. But what unites them is a deep belief in building a better world — or simply *'Believing in Better'*. That clarity of purpose, grounded in a shared SOI, transcends geography, hierarchy and personal identity — internally and externally.

**Euro Pool Group**, Europe's largest distributor of fruit and vegetables, turns over more than €1 billion a year. Every day, its operations are shaped by a shared commitment to *'maximising circular solutions'* — a clear, practical SOI that's driving innovation, attracting talent, and delivering long-term value to shareholders and the wider food ecosystem.

Now take the fashion industry — a sector not exactly known for transparency or social conscience. I've seen up close how quickly some

big players rush to slap on a soft-focus purpose statement, layer it with sleek branding, and call it change. But **Community Clothing** in the UK and **Norden** in Canada are different. These businesses are driven by powerful SOIs that go far beyond image. They're profiting by creating pride, quality jobs, tangible improvements for people and the planet.

And while some big corporates are still clinging to the past, others have started to adapt. You might want to take a look at **PepsiCo** and its *'Performance with Purpose'* platform, or **IBM's** *'Smarter Planet'* strategy. Then there's **Unilever's** *'Sustainable Living Plan (USLP)'* — a standout example of what it looks like when real leadership meets real purpose. Paul Polman, Unilever's former CEO and the driving force behind USLP, showed what it takes to confront the status quo — not just within his company, but across the business world.

SINGLE ORGANIZING IDEA (SOI)	TYPE	ENTERPRISE
<b>Enabling Change</b>	Inclusive business network/platform	IBAN
<b>Partners for Good</b>	American INGO	Global Communities
<b>Collective Success</b>	New Zealand tax collection technology	DataTorque
<b>Promote and Protect</b>	Global human rights organisation	UNHCR - GANHRI
<b>Pride</b>	British clothing manufacturer	Community Clothing
<b>Believing in Better</b>	American faith-based INGO	Catholic Relief Services
<b>Mining the Resource. Enriching the Nation*</b>	Anglo/African mining company	Debswana
<b>Cultivating Wholesome Food</b>	French food products company	Danone - Blédina
<b>Building Better Communities</b>	New Zealand construction company	Hawkins
<b>Assuring Confidence</b>	American accreditation organisation	ABET
<b>Waste</b>	Canadian apparel manufacturer	Norden
<b>Maximising Circular Value</b>	Dutch logistic company	Euro Pool System

This list of twelve is a representative sample. I have worked with many other companies around the world but due to confidentiality restrictions cannot list them here. \*I was working with WPP when this was coined in 2001. It wasn't defined as an SOI but it was based on the truth and subconsciously changed me and my goals – two years later, I was developing SOI.

## 1.8 A VERY HUMAN APPROACH

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Whether you're building a business, planning a holiday, or buying a car, if you're thinking clearly, you'll do your research, weigh up your options — and then use both your heart *and* your head to make the right decision.

The best SOIs are discovered through honesty, human connection, collaboration, empathy and a shared pursuit of truth. In an age of 'fake everything,' that kind of integrity isn't just admirable — it's essential.

An SOI isn't scribbled on the back of an envelope. It's uncovered through real work, real commitment and real leadership. The time it takes depends on the size and shape of your business — but no matter what, it will require courage, curiosity and a willingness to face uncomfortable truths.

It may also challenge how you think about success. You'll need to track and measure progress in new ways — not just financially, but in terms of impact and long-term value. Above all, it will take trust: trust in your team and trust in those outside your walls. Their insights, ideas, and collaboration are what will bring your SOI to life.

### Starting off

If you can, bring together a small SOI team. As the business owner or CEO, you'll need to stay closely involved — but you should also nominate someone to lead the team day-to-day.

Choose someone with solid project management and people skills. This is a fantastic opportunity for a rising star to step up and develop. You will also want to bring in someone external with proven experience and results to guide the process and help keep momentum.

But choose carefully. The right advisor or mentor will be someone who inspires, challenges, and holds the team to account. Look for a straight talker with broad experience, real-world judgement and a healthy dose of pragmatism. They should be a future thinker — but not an idealist. Someone who can help you balance what's possible with what's practical.

The team's first task is to complete the *identifying* phase. That means using the tools and frameworks in the next part of this book to run a thorough analysis of where your business is now — and where it can go.

Like any good project, success depends on preparation, planning and performance.

You might also want to give your project a name. One of the first steps for your team is to come up with something neutral but uplifting — something that signals momentum and possibility.

Once you've got your plan — and your name — you're ready to begin the exciting process of discovering your SOI and changing your business for good.

**Here's the process** Like any good project, successful management also depends on those other 'Ps' — preparation, planning and performance.

### 1: Identifying

#### Research and Analysis

- Desk Research
- Interviews
- Workshops
- Crowdsourcing
- Comms/Brand Audit
- Touchpoint Journeys
- Societal Impact Analysis
- Trends Analysis
- Benchmarking
- Stakeholder Mapping
- Competitor Analysis

### 2: Defining

#### Strategic framework



### 3: Aligning

#### Organisational Development (OD)

- Business Functions**
- People & culture
  - Innovation
  - Communication
  - Products & services
  - Processes & systems
  - Sales & marketing

**Learning Loops**



Ongoing stakeholder communication and collaboration



## KEY POINTS

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The threat to business-as-usual is undeniable. SOI is a proven toolkit for those with the **ambition and commitment to profit from change**.



SOI is needed because a fluffy purpose statement is not enough to bring financial and social strategies together in ways that **ensure coherence and commercial success**.



SOI replaces the top-down organisation model with a decentralised **self-organising model that inspires people to contribute** to a business that benefits everyone while achieving commercial success.



**SOI guided businesses stand out**; they attract and retain the most ambitious talent, uniquely attract long-term investors and benefit from naturally cultivated, deeply loyal customers.



In an ever more vigilant world, **purpose washing and compliance box-ticking is not going to cut it**. Sustainable progress and its benefits will only go to those who earn it through application and grit.

## CHAPTER 2 :

# IDENTIFY

**How to identify your SOI.** Your SOI already exists. In this section you will find the tools and methods you need to discover it.

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- 2.1 Desk research
- 2.2 Workshops
- 2.3 Interviews
- 2.4 Understanding stakeholders
- 2.5 Positioning spectrum
- 2.6 Social contribution analysis
- 2.7 Touch-point analysis
- 2.8 Crowdsourcing
- 2.9 Bringing it all together



SINGLE ORGANIZING IDEA

## 2.1 DESK RESEARCH

To shape an SOI that ensures your business is fit for the future, the first step is to understand exactly where you are today — and then explore the future events and mega trends that could shape where you're headed.

The easiest way to think about this is through the lens of climate. If a weather forecast tells you what's likely to happen in the next few days or weeks, climate projections offer a longer-term view — helping you understand the forces that could shape your business in the years to come.

Some trends will be specific to your sector.

- What new products and services are likely to emerge?
- How will they differ from what's available today?
- Why will people want or need them?

Alongside this, consider the likely evolution of regulation.

- What rules or policies are on the horizon?

- How will these affect your market, your operations, your people?
- What will future employees, consumers, and investors expect from you?

Two forces that will reshape every business, without exception, are technology and sustainability. Your team should explore what kind of impact both might have on your sector — and your specific business.

This early stage of research gives you a vital forward-facing view — a sense of the risks and opportunities ahead. Just as importantly, it gives you a *social and economic baseline* — a context you can use later to assess and test the strength of your SOI options.

### Benchmarking

Bringing in an experienced external advisor at this stage can be invaluable. Their cross-sector insight can help you spot opportunities and challenges you might otherwise miss.

Benchmarking is more than just a comparison exercise. Done well, it helps mitigate risk, spark

new thinking and build confidence in the path ahead.

Looking at how other organisations — even those outside your own sector — have created meaningful change can be incredibly helpful.

The key is relevance. The examples you gather should resonate with your context — but don't be afraid to look wide. Sometimes the most surprising sources offer the biggest breakthroughs.

### Capturing insights

You can document your research in a report, but the most effective format is often a concise slide deck.

Boil your findings down to the essentials and make sure the final few slides highlight the most important insights — the patterns, provocations, and opportunities that will shape the direction of your SOI work going forward.

SOI® PESTLE analysis				
Factors	Key question	Step 1: List trends	Step 2: List implications for your business	Step 3: List key insights to help create an overall premise
POLITICAL	How may government and other political factors impact my business?			
ECONOMIC	What economic trends could have an impact on my business?			
SOCIAL	What are the emerging social and demographic trends?			
TECHNOLOGICAL	What technological innovations could affect the market?			
LEGAL	What changes in legislation could impact my business?			
ENVIRONMENTAL	What ecological aspects influence the business?			

**Doing your homework will save you time and costs** Desk research basically involves collecting data from internal and external sources.

## 2.2 WORKSHOPS

Workshops are a critical part of any SOI project. They help uncover what's really in the hearts and minds of your staff and key stakeholders.

The insights gained reveal current strengths and weaknesses, as well as future aspirations — all seen through the eyes of those closest to your business.

Over the past 20 years, I've used the format described here to successfully engage people across industries, roles and cultures — in more than 40 countries. The most effective approach is always an open one: encouraging honest interaction and self-discovery.

By framing conversations around global change and inviting participants to share their personal and team perspectives, workshops help surface deep insights. They also consistently highlight a gap between how people see the business today and how they'd like to see it in the future. That gap — large or small — **always** reveals a shared desire for better.

SOI workshops are transparent and inclusive by design. They build goodwill and create early buy-in.

The number and timing of workshops depends on your business size and geography. Ideally, keep each group to no more than 20 people. You might run them all in a 72-hour sprint, or space them over several weeks. Plan according to your resources and context.

### Overview

Each workshop lasts half a day and includes:

- A 10-minute presentation
- Three interactive exercises

Three weeks ahead, participants should receive an invitation explaining the SOI project, the workshop details and prep instructions for Exercise 1.

### Presentation (10 mins)

The tone should be TED-style: energetic, informative, and inspiring. It's not about selling — it's about setting the scene and inviting meaningful contribution.

The presentation should cover:

- Introductions
- What's changing in the world and why (I use a clip from BBC's *Blue Planet* to spark reflection and frame the SDGs)
- The potential of an SOI
- Project overview and process
- Short Q&A to confirm understanding

### Outputs:

- Clear understanding of the forces reshaping business
- Appreciation of the value of a strategy aligned to an SOI
- Recognition of the project's importance and support from leadership

**Exercise 1: “Today & tomorrow” (Time varies)**

Before the workshop, each participant brings two objects (or pictures of objects):

- One that represents how they feel about the business today
- One that reflects how they’d like the business to be in the future

Each participant shares for 2 minutes. A facilitator records the descriptions under ‘Today’ and ‘Tomorrow’ headings. The exercise is personal and non-judgmental — discussion is kept to a minimum to preserve the integrity of each individual contribution.

**Outputs:**

- First-hand insights into current and desired perceptions
- Visible gaps between the actual and the ideal
- A sense of whether shared purpose exists — or doesn’t

**Exercise 2: “Metaphors & meaning” (1.5 hours)**

Participants split into teams. Each team receives:

- A deck of images (animals, shapes, transport, abstract)
- A worksheet

Part 1: Teams select images that best represent the business *today*, noting associated qualities (e.g., a horse might mean agile, reliable, prestigious).

Part 2: The process is repeated for the *ideal future state*.

Each team shares their thinking with the group. A facilitator captures the actual vs. ideal qualities

**Outputs:**

- Rich insight into how teams perceive the business
- Understanding of latent vs. aspirational qualities
- A clearer picture of purpose alignment and ambition

**Exercise 3: “Hard & soft qualities” (1 hour)**

Teams receive two lists:

- 20 hard (tangible) qualities
- 20 soft (intangible) qualities

They choose four from each list that they believe are essential for future success. Lists are informed by earlier research but also leave room for suggestions.

Back in the main group, all chosen qualities are listed and discussed. Participants reflect on how well the business currently reflects each one and ranks them.

**Outputs:**

- Deeper insight into current vs. desired business character
- Identification of key attributes for success
- Understanding of perception gaps and knowledge depth

SOI® Workshop: Exercise 3 Worksheet (example)

**Intangible qualities**  
Choose and circle 4 qualities

Focused	Ingenious	Geeky
Cool	Sociable	Supportive
Prestigious	Dynamic	Proactive
Flexible	Reassuring	Influential
Straight forward	Communicative	Caring

SOI® Workshop: Exercise 3 worksheet

**Ranking the qualities**

Intangible Qualities	1	2	3	4	5	TOTAL
Quality A						
Quality B						
Quality C						
Quality D						

SOI® Workshop: Exercise 3 worksheet (example)

Target quality	Wk 1	Wk 2	Wk 3	Wk 4	Wk 5	Wk 6	Wk 7	Wk 8	TOTAL
Subsistence									
Quality partners/partnership	1	2	1	2	1	1	1	1	9
Best staff	2	3	1	2	1	3	1	1	16
Best track record/track	1	1	1						3
Superior product/service	2	2	2	2	3	3	2	2	22
Innovative	2	3	1	1	1	2	2	2	16
Quality of working and production									0
Superb/award winning									0
New business									0
Best of class standards									0
Customer next door	1	1	1	1	2	2	2	2	12
Research driven									0
Project management									0
CRM									0
Results oriented	1								1
Sustainable solutions									0
Private ownership									0
Proper documentation									0

SOI® Workshop: Exercise 3 worksheet (example)

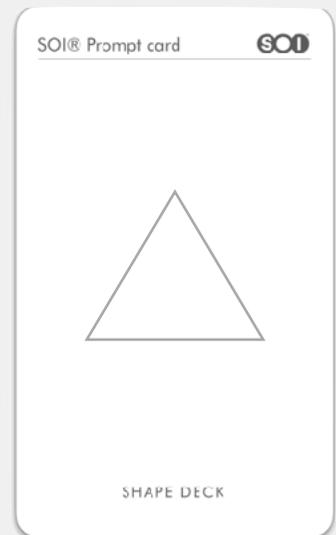
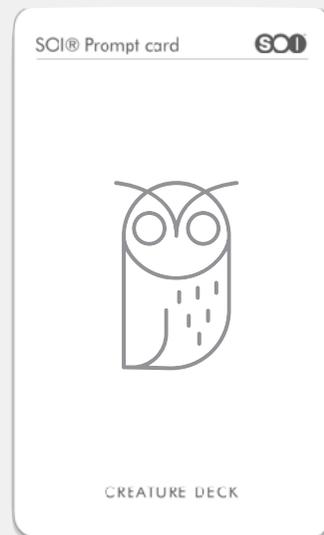
Write down all the qualities in this box

SOI® Workshop: Exercise 3 worksheet (example)

Write down all the qualities in this box

SOI® Workshop: Exercise 3 worksheet (example)

Case	Workshop No.	Team No.
Expert staff	Heritage	
Unique approach	Partnerships	
Best of class service standards	Private ownership	
Specialist COGS product	Best licenses/agreements	
Successful commercial track record	Long term relationships	



Hands-on tools make workshops insightful and rewarding. The shelf-life of the outputs will last well beyond the activity itself.

## 2.3 INTERVIEWS

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Interviews are gold dust. Held in confidence, they are the single most important part of the SOI research phase. No other method offers a better way to lift the bonnet and understand what your business is really about.

I've relied on interviews extensively in every engagement I've taken on — and I always look forward to them. They provide a rare and invaluable opportunity to look someone in the eye and uncover what really matters: the truths people carry about the business, along with their hopes and fears for its future.

With the right approach, an interview becomes a human moment — one that reveals the values, qualities and motivations that shape the business from the inside out. You'll also gain vital insight into what drives the individuals who have a real stake in its future.

Notice I talk about doing these interviews *myself*. This is not something to delegate to your internal team. To uncover real insight, interviewees need to speak freely with someone independent — someone skilled at asking the right people the

right questions and listening carefully to what's *not* being said as much as what is.

It's important to identify a broad range of internal and external interviewees — people who are both decision-makers and opinion-formers. And interviews should follow a logical sequence, so that insights gathered early can inform later conversations. While the CEO is usually seen as the first port of call, I often find it more productive to speak with others first — and then engage the CEO with a better-informed perspective.

These are *not* surveys. Interviews are in-depth, individual conversations. Questions should evolve as your understanding grows. In some interviews, you may ask only three or four questions during the hour I recommend you allow.

In addition to facts and observations, interviews often surface rich stories, emotional insights and subtle signals of alignment or resistance. They are also an excellent way to quietly test early ideas and assess appetite for change.

Just like the workshops, both the invitation to participate and the follow-up thank you note are opportunities to build interest, demonstrate care and generate momentum for the SOI project.

Confidential, in-depth interviews are the most revealing part of the SOI research phase — offering human insight no survey ever could. They surface the values, motivations and emotions that shape your business from the inside, while quietly testing ideas and gauging appetite for change. To work, they must be led by someone independent and skilled — able to listen between the lines and ask the right questions at the right time. Done well, interviews provide a powerful window into what really matters, build trust, and generate valuable momentum for the journey ahead. In short: they're gold dust for a reason.

## Interview questions

### 1. Background

- What has made the business successful to date?
- What is the reputation of the business – would you say it is positive, negative, or neutral? Does it vary for different stakeholders?
- How is the reputation of the business managed? How do you think it should be managed?
- What role do values play (amongst employees, leadership, stakeholders)?
- How would you describe the leadership style of the business; how do things get done?
- Are successes celebrated; what ones, when and how?
- Is there pride in the business; what is the basis for it?

### 2. Sector

- What is the reputation of the sector?
- What is the future for the sector; to what degree will the sector change; how will the sector develop?
- Who/what is influencing that change?
- Who are the opinion formers/leaders within the sector?
- What factors do companies in the sector compete on?

### 3. Positioning

- How is the business currently positioned? Has that always been the case? How should it be positioned in the future – the same/differently?
- Who do you regard as your most immediate competitors? How are the top three positioned; what are their strengths/weaknesses?
- Does the business ever collaborate with its competitors; how?
- What are the preferences and expectations of your customers (stakeholders)?
- How are the preferences/ideals of your customers (stakeholders) changing and developing?
- How do you rank your stakeholders; who are the most important? Which have the greatest influence on your business?

### 4. Future

- What is the ambition of the business?
- How will the business measure success in the future?
- What are the critical factors that will affect the business's performance in the future?
- What organisations do you most admire in the sector?
- What organisations do you most admire outside the sector and why?

### 5. And finally...

- Is there anything that I haven't asked you that you feel is important for me to know?

These questions are designed to prompt reflection, reveal truths, and uncover insights that might otherwise stay hidden. You won't ask all of them in every interview — nor should you. Use them as a flexible guide, adapting your approach as the conversation unfolds. The most valuable answers often come when people feel heard, not interrogated. Keep your focus on listening with curiosity, noting not just what's said, but how it's said — and what's left unsaid. The stories and signals that emerge will help you spot patterns, test assumptions, and start to shape an SOI grounded in what really matters.

## 2.4 UNDERSTANDING STAKEHOLDERS

Back in 2004, *The Financial Times* defined a stakeholder as “*anyone who can bugger up your business.*”

A lot has changed since then. Today, it’s more helpful — and more accurate — to see stakeholders as *anyone who can help your business.*

Understanding your stakeholders’ perceptions, concerns, and attitudes is critical to identifying a meaningful SOI. If you don’t know what matters to them — what they need, value and expect — you can’t shape an idea that resonates or creates real-world value.

Stakeholders exist both inside and outside your business. They are part of the wider ecosystem you operate within. Broadly speaking, there are two types to consider:

- **Primary stakeholders** are directly affected by your business. These include shareholders, employees, customers, consumers, owners, creditors, investors, governments (in their tax-collecting capacity), suppliers, partners, contractors, and local communities.

- **Secondary stakeholders** are not directly connected to your operations but can still influence — or be influenced by — your actions. They include unions, policy-makers, trade associations, NGOs, advocacy groups, potential customers and employees, competitors, analysts, media, academics, think tanks, alumni, and the general public.

You may be surprised by just how many stakeholders your business touches. And don’t forget — the planet is a stakeholder too. It may not speak, but it’s certainly shown its ability to disrupt businesses that ignore it.

Stakeholders form opinions based on direct experience, media you control (like marketing), and media you don’t (like hearsay). And thanks to social media, a single opinion — shared at speed — can shape perception faster than any ad campaign. Stakeholders armed with smartphones and emojis often bypass the facts entirely, replacing deep insight with instant feedback.

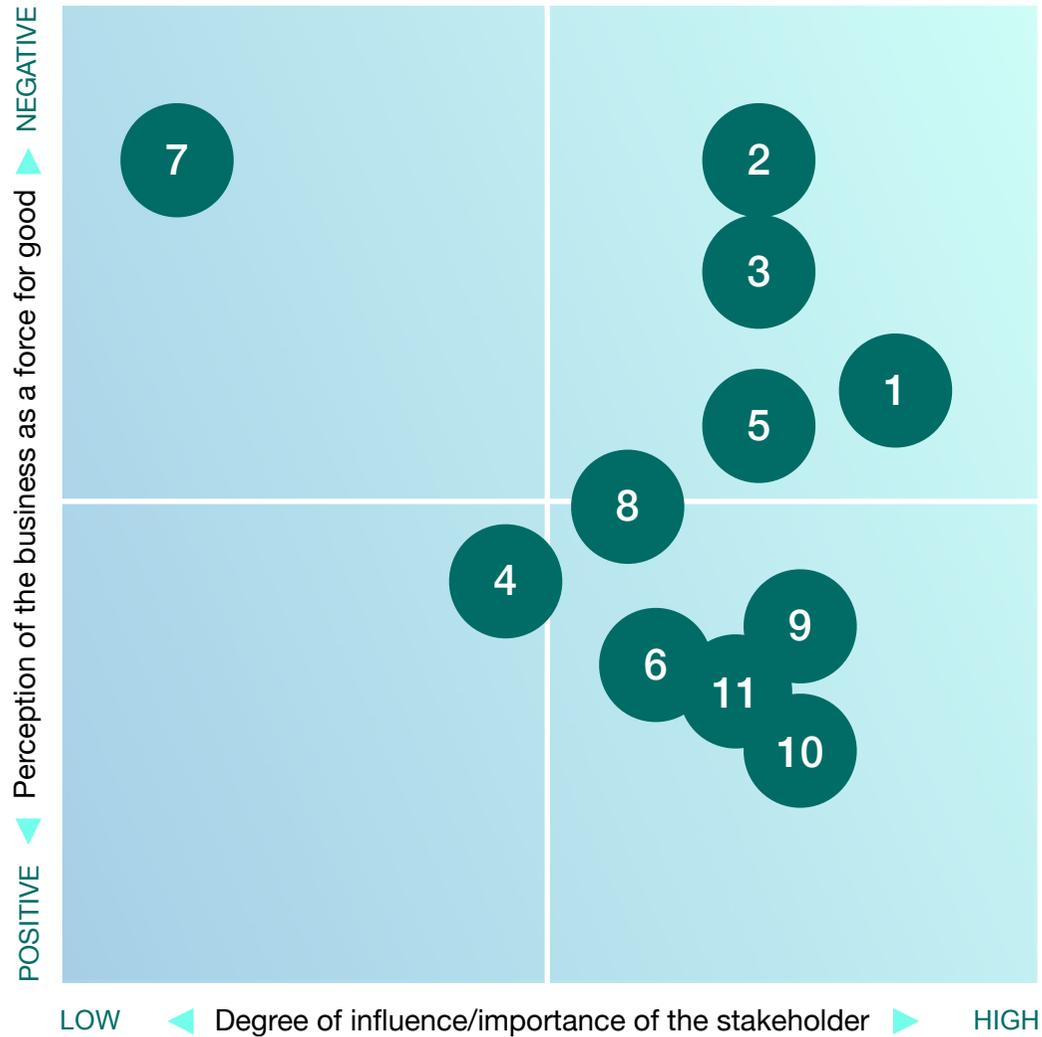
That means what stakeholders *think* and *feel* about your business might not reflect the truth —

but their opinions still carry real consequences. And those opinions can shift in an instant.

To understand your stakeholders properly, gather a diverse group and explore three simple but powerful questions. These will help reveal concerns, identify priorities, generate goodwill, and ensure your SOI reflects the real world your business operates in.

Refer to the matrix on the next page and ask:

- *Who are our stakeholders?*
- *How do they perceive our business?*
- *What are their concerns?*



**Stakeholder examples**

- 1. Customers
- 2. Staff
- 3. Shareholders
- 4. Suppliers
- 5. Competitors
- 6. Media
- 7. NGOs
- 8. Associations
- 9. Sector think tanks
- 10. Policy makers/regulators
- 11. Government watchdogs

The first part of the exercise is to brainstorm all the stakeholders you can think of. This example shows a very short list of top-line stakeholder groups. Each of these groups can be broken down into types and then individual organisations. For instance, there are lots of types of media. You could easily identify 30+ stakeholders in a brainstorming session with colleagues.

Understanding who is in the ecosystem of which your business is a part will influence how, when, where and who you engage with in the future to help build a business for good. Note your competitors are amongst your stakeholders and possible future allies!

## 2.5 POSITIONING SPECTRUM

When marketing pioneer Walter Landor said in the 1960s, “*Products are made in the factory, but brands are created in the mind,*” he nailed the power of positioning in a single sentence. Understanding the space your business — and others — occupy in the minds of your key stakeholders is an essential step in building a credible and successful SOI.

Where traditional businesses use positioning to drive sales and gain a competitive edge, your goal here is different. The SOI approach isn’t just about outperforming others — it’s about helping your business, and the ecosystem around it, *thrive*.

That means the method is similar, but the purpose is entirely different. You’re not simply mapping the market — you’re identifying who’s already acting as a force for good, especially among competitors and suppliers, and how they’re reinforcing that position through their communications and actions. This can spark ideas, expose gaps, and even reveal partnership opportunities down the line.

### Mapping

The positioning spectrum (illustrated opposite) is a visual tool to help you place key external stakeholders relative to your own business. To populate it, follow these steps: First, identify which external stakeholders you should assess. Second, review and analyse their actions and their communications.

### Step 1: Analyse the messaging

Start by reviewing their websites — especially the “About Us” section. You’re looking for signs of clarity and consistency across the following:

- **Proposition**  
Look at mission, vision, or purpose statements. Is the message clear and consistent?
- **Marketing strap-line**  
Usually found near the logo — a good strap-line succinctly conveys the organisation’s purpose.
- **Key messages**  
These are repeated, central statements that reinforce the brand’s value. Good ones are simple and consistent.

- **Qualities**

Look for repeated references to tangible (products) and intangible (experience, service) qualities. Focused businesses mention a few. Unfocused ones list many — usually a sign they’re unsure what truly sets them apart.

### Step 2: Assess look, feel & tone

Now compare their brand expression — the “personality” they project across channels. This includes:

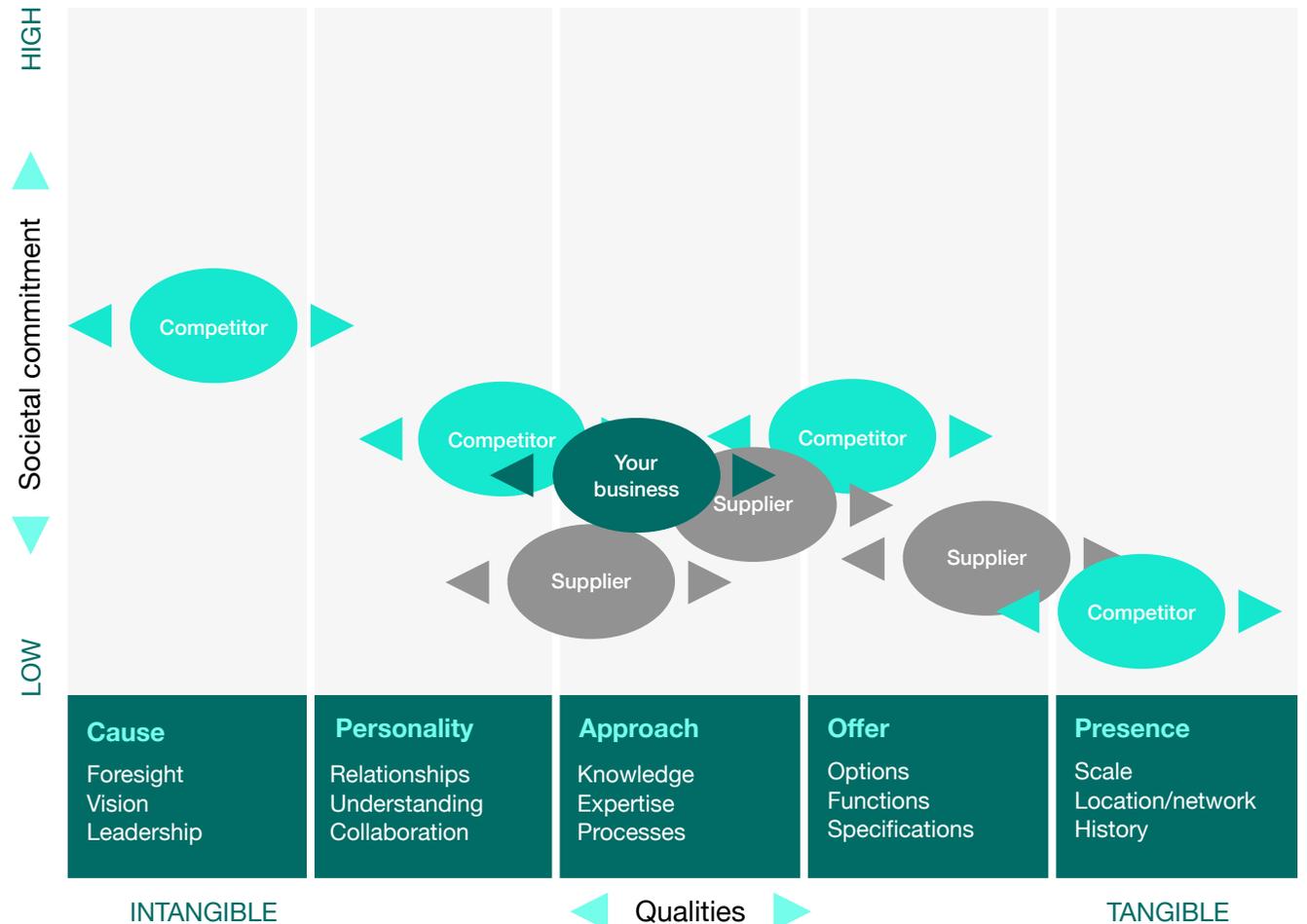
- Visual appeal
- Distinctiveness
- Memorability
- Interactivity/engagement
- Simplicity
- Consistency across platforms
- Flexibility/adaptability across media
- Cost efficiency

**Why it matters**

This evaluation will not only show you where other organisations sit relative to your own — especially those in your ecosystem — but it will also highlight:

- What’s working in terms of positioning and communication
- What isn’t
- Where you can improve
- And where you might find alignment for future collaboration

Importantly, don’t forget to run this same analysis on your own business. The insights you gain here will feed directly into refining and validating your SOI.



**Positioned for success** Organisations on the right of the spectrum quote tangible qualities, such as how big they are, how many things they sell, and what the things they sell do in their communications. Organisations on the left quote intangible qualities that explain why they do what they do. Many organisations today claim to be making some sort of contribution to society. The likely impact of that contribution can also be mapped on this spectrum once you have carried out the social contribution analysis explained in the next chapter.

## 2.6 SOCIAL CONTRIBUTION ANALYSIS

Reviewing how your business already contributes to society is a simple but revealing exercise — one that often throws up valuable insights and can help shape your SOI.

Back in 2015, publishing giant Pearson identified 19 social issues of concern to its stakeholders using a process similar to the one described here. The resulting analysis helped evolve the company beyond traditional CSR, anchoring its strategy in a clear purpose:

*“helping people make progress in their lives through access to better learning.”*

This kind of analysis helps you understand what your stakeholders care about and how your business is already engaging with those concerns. By mapping your current philanthropic and CSR activities, you’ll gain clarity on the investments you’re making in society — and the nature and impact of those efforts.

Understanding the different objectives and types of contribution will reveal strengths and weaknesses in your current approach. It will also help you distinguish between passive “no harm”

policies and proactive, value-creating initiatives — like those at the heart of Michael Porter’s Shared Value Initiative.

### How to do it

#### Step 1

Ask your SOI team to identify and gather all current initiatives your business is involved in. Start with documents, but be prepared to conduct interviews — internally and externally — to get the full picture.

#### Step 2

Use the Social Contribution Working Sheet to detail each initiative. Note both the *social* and *business* impacts, as well as the costs associated with each contribution type.

#### Step 3

Transfer findings to the Social Contribution Summary Sheet. This will allow you to rank and compare the effectiveness of all efforts in one place.

This exercise will do two things:

- It will help you surface potential directions for your SOI
- And later, it will help you focus on — and scale — what aligns with your SOI, while letting go of what doesn’t

Reviewing how your business currently contributes to society is a simple but powerful way to uncover insights that can shape and strengthen your SOI. This analysis helps clarify where your social investments are going, what impact they’re having, and whether they align with what your stakeholders truly care about. By distinguishing between passive CSR efforts and proactive, value-creating initiatives, you can identify strengths, address gaps, and unlock opportunities for deeper alignment. Ultimately, this exercise helps you focus your efforts where they matter most — scaling what supports your SOI, and letting go of what no longer serves your purpose.

Charity	Philanthropy	Corporate Social Responsibility	Shared Value	Sustainability
Simple acts of kindness (Giving fish)	Charity with direction (Teaching how to fish)	Actions that minimise harm (Not overfishing)	Identifying societal problems that realise a return on investment for the business	Actions that assure the resilience of the business and society
Short-term  Emotional intervention  Focused on providing relief	Mid/long-term  Focused on problem solving  Cause-driven	Compliance with standards largely set by external agencies  Responsible citizenship  Triple bottom line reporting  Building trust  Protecting brand reputation  'Bolt-on' initiatives	Focus on profitability  Transactional relationships pursued by some functions of the business  Achieving competitive advantage  Lowering costs  Driving efficiencies and addressing deficiencies	Optimising total alignment across all functions of the business to achieve a common ideal  Building effective ecosystem relationships  Innovation that meets the needs of all stakeholders  Reducing risk for all  Core SOI strategy

**Levelling up** Having an SOI at the core of your business sits squarely in the sustainability category. This is the highest level of commitment to society. In this category ALL your business functions and operating system are committed to delivering sustainable outcomes for your business, people and the planet.

## 2.7 TOUCH-POINT ANALYSIS

You've heard the phrase *"first impressions count."* In business, those impressions happen at touch-points — the moments when stakeholders experience what your business really stands for.

These moments of truth can have a lasting impact. If the experience is positive — aligned with stakeholders' needs, values or expectations — it builds loyalty. They may return, advocate for you, and bring others with them.

If the experience falls short — if promises aren't matched by reality — they may walk away or, worse, warn others to do the same.

By analysing these stakeholder experiences, you can pinpoint where your business truly engages — and later, ensure those moments are intentional, consistent with your SOI and aligned with your values.

Touch-points are often interconnected and vary by stakeholder type. For example, employee touch-points might include:

- The recruitment experience
- Onboarding
- Workplace tools and systems
- Internal communications
- Meeting formats
- Company rituals and policies

### The Analysis

As with many SOI tools, success here depends on collaboration.

Using the SOI Touch-point Worksheets, cross-functional teams can be briefed and facilitated to:

- Identify all relevant touch-points in their area
- Describe the stakeholder impact at each touch-point

- Validate the experience with those stakeholders
- Prioritise the most significant ones

You don't need to fix everything right away. The point of this exercise is to prepare — so that once your SOI is defined, you're ready to realign what matters most.

What's more, by doing this early:

- You'll engage your team and build goodwill
- You'll involve stakeholders in a meaningful way
- You'll uncover impact opportunities
- And you'll begin to identify where future priorities lie

Yes, it takes time — but the payoff is real. This analysis doesn't just highlight opportunities for social impact. It also reveals areas where efficiencies can be gained and costs reduced — a double benefit that will serve you well as your SOI journey unfolds.

### SOI Touch-point Dashboard

Touch-point	TP 1	TP 2	TP 3	TP 4	TP 5
Description					
Business function area					
Societal impact					
SOI Alignment					
Efficiencies alignment stage	<input checked="" type="checkbox"/> Start <input type="checkbox"/> Stop <input type="checkbox"/> Keep	<input type="checkbox"/> Start <input type="checkbox"/> Stop <input checked="" type="checkbox"/> Keep	<input checked="" type="checkbox"/> Start <input type="checkbox"/> Stop <input type="checkbox"/> Keep	<input type="checkbox"/> Start <input type="checkbox"/> Stop <input checked="" type="checkbox"/> Keep	<input type="checkbox"/> Start <input checked="" type="checkbox"/> Stop <input type="checkbox"/> Keep

**Listen up** Setting up listening posts and regularly engaging your stakeholders with smart feedback mechanisms that monitor activity at these touch-points will help you to create a ‘dashboard’ of indicators that can be used to track progress, assess the health of your business and the degree of alignment with your SOI.

## 2.8 CROWDSOURCING

Making people feel part of what's happening — and giving them a voice — is key to the success of any SOI project. But you can't interview everyone, and there's only so much ground workshops can cover.

Surveys are an option, but they tend to be limited — and limiting. Online crowdsourcing, on the other hand, is a brilliant way to open the door to broader participation. It allows you to gather powerful insights from across your stakeholder ecosystem, ensuring no one is left out.

The collective wisdom of your people — their knowledge, beliefs, and lived experience — is one of your richest untapped resources. Crowdsourcing gives you a way to access it.

I often use platforms like [synthetron.com](https://synthetron.com). These tools bring large, dispersed groups together online — regardless of location (only time zones matter). One of the big advantages is anonymity. It levels the playing field, encouraging honesty and giving everyone — regardless of role or status — a safe space to contribute.

We're all individuals with different perspectives. But often, there are powerful moments of alignment. And when it comes to defining your SOI, it's not about *who* said what — it's about *what* was said, and what people can agree on.

With the right questions, a skilled moderator can engage up to 1,000 people in a single hour. In that time, you won't just collect ideas — participants will actively prioritise them, pushing the strongest concepts to the top of the list.

### The process

- **Choose your platform**  
There are many to choose from, including Synthetron. Make sure the platform delivers *conclusions*, not just a data dump that's impossible to process.
- **Schedule the session(s)**  
Decide whether to run a single session or multiple. You can mix participants across stakeholder groups or focus on specific ones — whatever will be most revealing for your project.

- **Define your questions**  
Work with the session facilitator to shape the discussion. Use gaps in your research to guide what you ask. The interview guide (pages 29–30) can help. Start with a simple, inclusive question to warm up the group — and avoid asking too much at once.
- **Invite participants**  
Use the invitation as an opportunity to build engagement. Even those who can't attend will feel more included — just by being asked.
- **Run the session with an open heart and mind**  
Listen. Let participants speak freely. You'll be surprised how quickly the important themes rise to the surface.
- **Collate and present insights to your SOI team**  
Focus on the most relevant takeaways and what they reveal about stakeholder sentiment and alignment.

## 2.9 BRINGING IT ALL TOGETHER

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Facts and insights are the essential ingredients that, when combined with intuition, form the basis of a successful SOI. By this stage, you'll have gathered a lot of material. The challenge now is to bring it all together — to review, analyse and make sense of it in a way that sets the stage for defining your SOI.

The best way to do this is through a hypothesis presentation that logically lays out your evidence, highlights your insights, and outlines the most promising route forward.

The goal is to communicate the findings compellingly. You need to show what the facts point to, what options exist and what you recommend as the way ahead.

This is the culmination of hours of work. It deserves time and attention — and the right people in the room. If you've brought in a consultant, it will be their job to deliver the insights and recommendations. If your

internal team has led the process, it makes sense for team members to share the presenting — each contributing what they discovered.

Either way, this moment can't be rushed. It's not just about presenting data — it's about laying bare the truth of your business, showing what's possible, and preparing for transformation. You'll likely be surprised by how much you've uncovered — and how much you didn't know.

Gathering the data is the easy part. Drawing out meaningful insights takes more effort. But the real skill lies in assembling everything in a way that makes sense, invites discussion and leads to confident, informed decisions.

There are always limits — to what you can research and to what can be shared. So balance is key. The presentation must carry enough weight to convince — without

overwhelming. It must feel both credible and actionable.

This isn't just a report. It's a turning point. A strong, well-delivered presentation doesn't just inform — it builds belief.

If the presentation lacks clarity or conviction, it won't move people. But if done well, it can inspire your leadership team to take ownership — and take action.

This is your chance to spark momentum. To set the tone for what's to come. To make the defining of your SOI — and the future it represents — feel real, relevant, and ready to happen.

<b>SOI PRESENTATION</b>	<b>Title slide</b> Project code name Date	<b>Objectives</b> Why	<b>Contents</b> Section 1 Section 2 Section 3	<b>SOI Methodology</b>		
<b>Section 1 IDENTIFYING</b> Research and analysis	<b>Section Introduction</b> Explanation Scope Objectives	<b>Desk Research</b> Approach Scope Insights	<b>Stakeholder Analysis</b> Approach Scope Insights	<b>Social Contribution Analysis</b> Approach Scope Insights	<b>Workshops</b> Approach Scope Insights	<b>Touch-Point Analysis</b> Approach Scope Insights
	<b>Crowdsourcing</b> Approach Scope Insights	<b>Interviews</b> Approach Scope Insights	<b>Research Conclusion</b> Key insights			
	<b>Positioning</b> Explanation Scope Objectives	<b>Positioning analysis</b> Stakeholders	<b>Positioning analysis</b> Your business today	<b>Positioning options</b> Today v tomorrow	<b>Positioning recommendation</b> Fit for future position	
<b>Section 2 DEFINING</b> Values Positioning statement SOI	<b>Section Introduction</b> Explanation Objective	<b>Positioning statement</b> Solution	<b>Value 1</b> Solution	<b>Value 2</b> Solution	<b>Value 3</b> Solution	<b>Value 4</b> Solution
	<b>Single Organizing Idea</b> Solution	<b>SOI Strategic Framework</b> Solution	<b>Summary</b> Conclusions Benefits	<b>Stress Testing</b> Instructions	<b>How it is and how it could be</b> To ensure everyone has the full picture fresh in their minds it's best to present the research work together with the defined SOI solution. This means one single presentation rather than two.	
<b>Section 3 ALIGNING</b> Next steps	<b>Section Introduction</b> Explanation Objective	<b>Next steps</b> Explanation Deliverables	<b>Roadmap</b> Explanation	<b>Presentation summary</b> Key points		

## KEY POINTS



Uncovering what is in the hearts and minds of your staff and key stakeholders will reveal the values, qualities and motivations that drive your business.



Identifying the gap that exists between how your staff and stakeholders perceive your business today and how they would ideally like it to be in the future helps set the right intentions for your SOI.



Today, technology and sustainability are challenging every business in every sector. How will they impact yours? How do these and other factors provide opportunities for you to identify and tie together economic and social goals that will benefit your



Positioning statements should no longer strive for a competitive advantage; indeed, they might reveal valuable opportunities to collaborate for the benefit of all.



The 'Identify' phase involves methodical work and commitment, but when it's done well it inspires your leadership team, builds momentum and sets the tone for implementation.

## CHAPTER 3 :

# DEFINE

**How to create your SOI.** Truth, logic and focus are the essential ingredients to creating a practical strategy that will last the test of time.

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- 3.1 The SOI strategic framework
- 3.2 Your core values
- 3.3 Your positioning statement
- 3.4 Your single organizing idea (SOI)
- 3.5 Stress testing your SOI



SINGLE ORGANIZING IDEA

## 3.1 THE SOI STRATEGIC FRAMEWORK

I can safely say I've met very few leaders who can recite their mission or vision statements.

On the other hand, I've met plenty of people — including some of those same leaders — who think it's all corporate bunk.

So it's no wonder that many of the best-laid plans of mice, men and armies of management consultants end up gathering dust on a shelf while people focus on hitting next quarter's numbers.

But as the old saying goes: *fail to plan and you plan to fail.*

The SOI Strategic Framework is your core strategy — clearly laid out in three simple boxes:

- POSITIONING STATEMENT
- VALUES
- SINGLE ORGANIZING IDEA

Viewed together, these elements answer three vital questions: Why your business exists, what it stands for, and how it operates.

This framework brings single-minded focus to your strategy. It gives you absolute clarity on what you're working to achieve — and a roadmap for how to build and measure your success.

And unlike mission or vision statements that often gather dust, this isn't meant to be hidden away. Your SOI Strategic Framework is a working document — a core communication tool that helps everyone understand what your business is doing, why it matters and how they can contribute.

It's a daily reference point. A visible, constant reminder of what matters most — accessible to everyone inside and outside the organisation. It helps guide action, spark alignment and build belief.

Everything you've learned in the identify stage is now going to be distilled — into a couple of sentences, a handful of values and one single, unifying idea.

Sounds impossible? It's not — as you'll discover over the next few pages.

What matters most are the words you choose to fill those three boxes. They'll shape decisions, influence culture, and guide how you grow for years — maybe even decades — to come.

Get this part right, and you'll have transformed your research into a solid foundation — one that's built to last and ready to lead.

**P.S.** If you've got a mission and vision statement, that's fine. They may have helped during the research phase — but now's the time to put them back on the shelf!

SOI Strategic Framework		
POSITIONING STATEMENT	CORE VALUES	SINGLE ORGANIZING IDEA
Your elevator pitch	Your commitments	Your guiding star
<p>The positioning statement frames and explains the value of your SOI to your business and to society in two or three pithy sentences.</p> <p>It's your elevator pitch.</p>	<p>Identified through research, these values underpin your SOI.</p> <p>Each value is a commitment against which actions and ideas can be assessed and monitored.</p> <p>They are carefully selected to help ensure holistic and consistent alignment of your enterprise with the SOI.</p>	<p>An SOI is a simple and memorable call to action that is measured.</p> <p>Relevant, compelling and sustainable, an SOI succinctly captures the core purpose of your enterprise.</p> <p>It's your guiding star.</p>

## 3.2 YOUR CORE VALUES

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There's no fixed order for which part of your SOI Strategic Framework to define first. In reality, you'll find yourself drafting, refining, and redrafting all three elements — Positioning, Values and your Single Organizing Idea — in parallel. It's a creative, iterative process and it's done when it feels *just right* to present and, importantly, test.

How long it takes depends on the quality of your research and the skill of your team (or the individual you've tasked with the job). For me, it usually takes about two days. Sometimes less. Sometimes more.

That said, if you're looking for a starting point — begin with your values.

Search online and you'll find endless definitions of what "values" are. Entire books have been written on the subject. But let's keep it simple.

In the context of your SOI, values aren't vague aspirations or culture-shaping fluff.

They're solid, non-negotiable commitments — the principles that will ensure your SOI delivers real, measurable outcomes.

*Your core values are the cornerstones on which your SOI rests.*

You've already put significant effort into understanding what matters to your people and stakeholders. The workshops, interviews and research have all been designed to surface insights around values — both your own and those of competitors, customers, and wider influencers.

That insight is rich and useful — but don't mistake it for a vote. In the end, your core values aren't about popularity. They're about leadership. They are the commitments *you* must make, and stand by, to deliver on the call to action your SOI demands.

Your values define how things get done. They shape the way progress is measured. They become the basis for stories people tell about your business — inside and out. And

whether someone is in a senior role or just starting out, how they perform — and how they're evaluated — will be guided by your values.

Which is why they must be crystal clear, directive and meaningful.

Be inspired by what your research has revealed — but be uncompromising in defining a values set that will drive your SOI forward.

You'll find guidance on how to stress test your values later in the Playbook — to make sure you've got them right.

POSITIONING STATEMENT	CORE VALUES	SINGLE ORGANIZING IDEA
<p>Our success is borne out of belief, a history of partnering and an understanding of what matters, and what doesn't.</p> <p>By being bold enough to dare and willing to care we help make everyone feel like winners.</p>	<p><b>Cooperative</b> Our heritage shows that we get the best results when we work in solidarity. By being inclusive we unite and support joint efforts that enhance our collective strength.</p> <p><b>Accountable</b> Our success is determined by the standards we set, the outcomes we pursue and the responsibility we take. By being straightforward, fair and answerable we underline we are dependable.</p> <p><b>Attentive</b> By being tenacious, by having the confidence to open our minds and empathise, we create unique opportunities that allow compassion and understanding to push forward progress.</p> <p><b>Courageous</b> Achieving better takes audacity and commitment. By relentlessly looking for improvement we challenge the status quo and shape new solutions and efficiencies.</p>	<p>Feel-good</p>

This Strategic Framework example is based on a solution created for a global sports-inspired fashion business with a hundred year-old history. Research showed, especially amongst the business's key consumer groups, that feeling good about the purchasing decisions they made was no longer just based on looks. This same sentiment was detected amongst employees and suppliers who were also questioning whether the business's CSR efforts were having any genuine impact. The opportunity was to turn 'feeling good' into a simple but highly effective SOI that could drive the entire business toward a successful, commercially sustainable future.

## 3.3 YOUR POSITIONING STATEMENT

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Your positioning statement is a concise summary that explains why your SOI matters — to people, the planet, and the bottom line.

It's not a sales pitch. It's not a fluffy purpose line. It's not a vague declaration or an abstract intention. It's a statement of fact.

In two or three short, sharp sentences, it should express the SOI at the core of your business in a way anyone can instantly understand — whether they're a customer, partner, new recruit or passing stranger.

To be effective, it must be short, direct, inspiring, practical and genuine.

### Short

People don't have time (or interest) for long-winded explanations. If your statement can't be delivered in the time it takes for an elevator ride, it's too long.

### Direct

Be clear and to the point. Your language should be concise, incisive, and confident. Don't dress it

up — just say it. Avoid jargon, soften the spin, and speak plainly.

### Inspiring

This isn't about selling. But if your business exists to make a meaningful difference, the explanation of why should leave people feeling like they've just met someone with a sense of direction and purpose. Your SOI is the foundation — your positioning statement should be its clearest expression.

### Practical

This replaces the need for vague mission or vision statements. A good positioning statement is grounded in what you *do*, not just what you *believe*. Be specific. Cut the clutter. Make it something people can actually *use*.

### Genuine

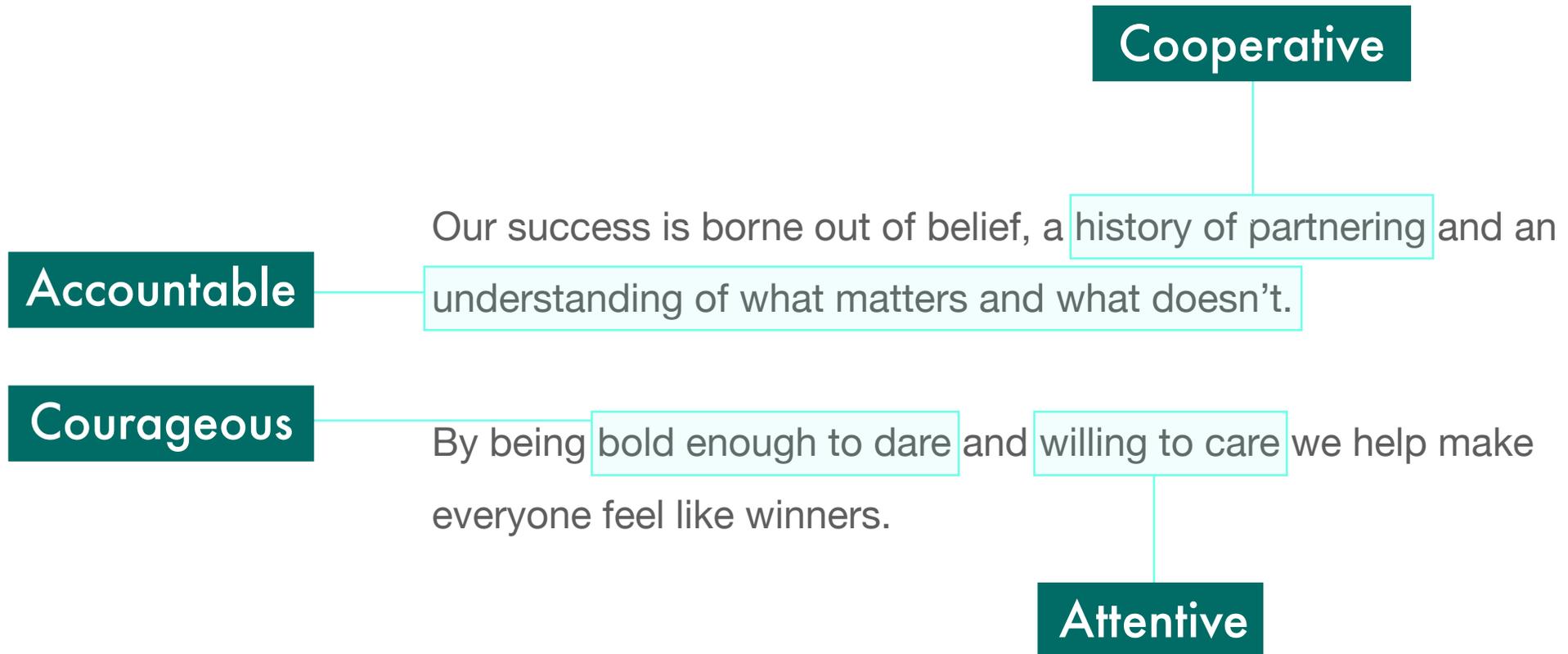
Is this a deep driver of change — or a surface-level "purpose wash"? Your SOI and values were built on truth. Your positioning statement must reflect that truth with candour, clarity, and the kind of sincerity that earns respect. If it doesn't

ring true to the people inside your business, it won't resonate with those outside it either.

Ultimately, your business will be judged by what it does, not what it says. So your positioning statement must not only explain your SOI — it must help guide the actions and decisions that bring it to life.

Just like your values, this will take time — and probably plenty of rework. You'll know when you've nailed it: there'll be a pile of crumpled paper (or drafts) around you, and a quiet sense of satisfaction that you've landed on something that actually says what you mean.

Your positioning statement is based on your identified core values and SOI. Weaving them together will help you form the two or three sentences you need to explain the value of your business.



## 3.4 YOUR SINGLE ORGANIZING IDEA (SOI)

The idea at the core of your business is its beating heart — the source of meaning and inspiration that energises every part of it. It's the unifying lodestar around which all decisions, actions, behaviours, and communications are aligned.

Getting to your SOI can be easy — or hard. Sometimes, the right idea reveals itself naturally during the research phase.

That's what happened during the final interview I conducted for an international NGO in the Middle East. At the very end of a long and demanding research process, the country director kept repeating the same phrase: *"We are here for good."* It stuck with me — and when I shared it with my client back in Washington DC, we immediately knew we had something. From that moment, *Partners for Good* became a rallying cry — an SOI that could inspire, guide and drive the performance of every part of the organisation.

In other cases, it takes time. You may need hours of back-and-forth, in-depth dialogue and rigorous brainstorming. You'll create lists,

narrow them down and refine your thinking until a single, powerful idea rises to the top — one that's ready to face the stress test described next.

SOIs are deceptively simple. And simplicity takes courage. Sometimes, it's just one word.

Volvo has been guided by the word *Safety* since 1927.

*Confidence* and *Pride* are two single-word SOIs currently inspiring two of the businesses I've worked with.

In the case of *Community Clothing*, *Pride* runs through everything — from the quality of design to the reopening of factories in disadvantaged areas. There's pride in the output, in the policies that support people with purpose and in the sense of achievement shared across the business. The pride even extends to customers who wear the label and feel directly connected to and a part of the purpose *Community Clothing* has set out to achieve.

Then there are two or three word SOIs that combine a clear outcome with a call to action —

like *Building Better Communities* or *Collective Success*. These are ideas that are simple, powerful and easy for everyone to understand and repeat.

Once you've defined your SOI — along with your values and positioning statement — you've got your:

- **Single** — one clear focus
- **Organizing** — systematically coordinated
- **Idea** — a concept that benefits all

Now it's time to test it.

Performance: A standard of success/achievement  
Behaviour: Positive morals and ethics, kindness, fairness  
Can be measured/assessed/factored

**FEEL-GOOD**

A human sense/emotion

Image: Quality, finish

Associated with aptitude, intuition, inclination

An outcome/reaction resulting from a connection,  
experience (a moment of truth)

## 3.5 STRESS TESTING YOUR SOI

Once you believe you've created your SOI Strategic Framework, it's time to stress test it.

Set yourself — and your team — the task of working through the stress test questions outlined here. Give everyone a few days to reflect individually before bringing the group back together to discuss the short, medium and long-term implications and opportunities your framework presents.

Encourage people to think not just about the business as a whole, but about the part they're responsible for. How does the framework apply to their function, their team, their decisions?

The most important question you can ask is:

*Will our chosen SOI help our business thrive commercially **and** contribute to making a positive difference in the world?*

If the answer is yes, you're ready. Lock in your SOI Strategic Framework — and get on with making it real.

### 8 POINT STRESS TEST

#### Criterion 1:

##### **Credible**

Is the SOI based on reality, hard facts and evidence?

#### Criterion 2:

##### **Resilient**

Will the SOI be sustainable over the long-term regardless of management, technology and market changes?

#### Criterion 3:

##### **Relevant**

Will the SOI deliver value to our business and our stakeholders?

#### Criterion 4:

##### **Commercial**

Will alignment with the SOI help ensure that our business thrives and maintains commercial success?

#### Criterion 5:

##### **Beneficial**

Will the adoption of the SOI impact positively on people and the planet?

#### Criterion 6:

##### **SINGLE**

Will the SOI provide the single-minded focus required to help separate what is important from what is not?

#### Criterion 7:

##### **ORGANIZING**

Will each function of the business and the wider ecosystem be able to self-organise their alignment and contribution to the SOI?

#### Criterion 8:

##### **IDEA**

Is the SOI a compelling concept that people internally and externally will admire and aspire to be a part of?

Moments of truth in our value chain. At a glance, how good (or bad) do we feel about our choices, practices and policies?

Design	Raw materials	Fabric & yarn production	Garment production	Transport	Sales	Customers	Recycling
Choice of materials:  Looks Style Quality	Processing of raw materials:  Working conditions (time, safety, health, wages) Water usage Chemical usage	Production of yarn and fabrics in mills:  Working conditions (time, safety, health, wages), Water usage, Chemical usage, Greenhouse gas emissions	In our own factories, as well as our suppliers:  Working conditions (time, safety, health, wages) Environmental standards	Transportation from factories to distribution and sales outlets:  Greenhouse gas emissions Transport types Transport distance	Selling products:  Working conditions and environments of outlet Energy usage of stores, offices and warehouses. Data privacy for colleagues and customers, Responsible advertising Fast fashion versus sustainable fashion	Care for clothes at home:  Energy usage/ greenhouse emissions Water usage Microfibre contamination Detergent usage	Garment after use:  Collection Repurposing Recycling Reprocessing fibres
Feel-good?	Feel-good?	Feel-good?	Feel-good?	Feel-good?	Feel-good?	Feel-good?	Feel-good?

**Prove it!** It's all well and good having the intent but the bottom line is delivering real action. Will acting on your SOI drive new efficiencies into the value chain, help reconcile product offers, and make better use of the ecosystem that surrounds your business? Will your SOI make your business a better business and the world a better place and can you measure it to prove the impact that you are having? In this SOI example, feel-good is a factor that can be measured and 'continuously improved' upon.

## KEY POINTS



Your SOI Strategic Framework brings together your positioning statement, values and SOI to succinctly explain the **why**, **what** and **how** of your business.



Your core values are defined to become bedrock realities that are put to use every day to deliver positive, commercial performance results.



Your positioning statement must be a sincere expression of fact that rings with the kind of candour that commands respect and demands serious contemplation.



Your SOI is the guiding star around which every decision and action is aligned. Everyone who knows your business knows they will find you there. The simpler the better: you need to have the courage to say less.



The moment of truth: stress test your chosen SOI to ensure it will advance your business and contribute to making a positive difference in the world. Once it's passed the test, it's locked in!

## CHAPTER 4 :

# ALIGN

**How to implement your SOI.** These tools will help you align with your SOI and start making a difference to your business performance and society.

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4.1 Total alignment

4.2 Business functions

4.2/1 People & culture

4.2/2 Innovation

4.2/3 Products & services

4.2/4 Communication

4.2/5 Sales & marketing

4.2/6 Processes & systems

4.3 SOI alignment canvas



SINGLE ORGANIZING IDEA

## 4.1 TOTAL ALIGNMENT

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**“The future is here —  
it’s just not evenly distributed.”**

– William Gibson

Right now, your SOI is just words on a page. But what your business — and the world — really needs is action.

Alignment with your SOI isn’t just a nice idea; it’s an objective to be achieved. To ensure your SOI doesn’t read like science fiction, you need to turn it into fact. That means committing to alignment — across every part of your business.

But change takes time. And as the quote suggests, it doesn’t arrive all at once.

While your SOI will serve as the focal point from here on, the benefits will take time to unfold. Think of alignment as a journey — with different parts of your business setting off at different paces (see diagram opposite). Some will make quick progress. Others will face barriers — structural, cultural, or otherwise — that slow them down.

That’s okay. The goal isn’t perfection overnight. The message should be one of evolution, not

revolution — especially if your business is used to a traditional, top-down model.

For some, sticking to the old way of doing things will feel easier than reaching for something new — particularly if the benefits aren’t immediately obvious. Culture, morale, resources, priorities, systems, habits — all of these factors will affect the pace and consistency of change.

That’s why it’s helpful not to think of alignment as a sequential process. It’s more like a staircase — steps of varying height and difficulty — climbed at different speeds by different parts of your organisation, but all moving in the same direction.

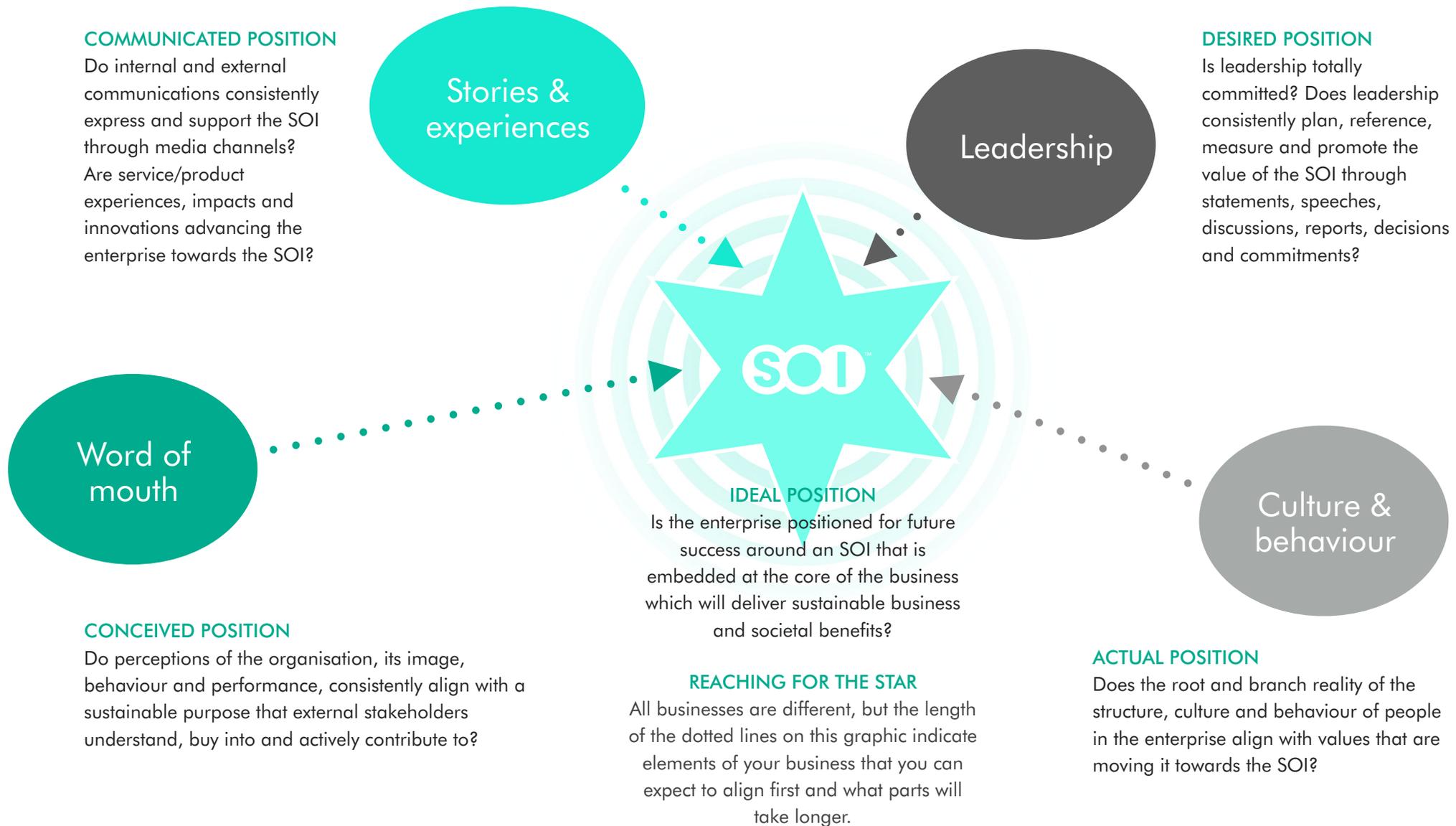
And while implementation is rarely smooth — and, in my experience, never truly finished — the principles of continuous improvement (*Kaizen*) are essential here.

The work you’ve done so far — through the identify and define phases — has already brought people together around a shared challenge. That collaboration is the key to progress. The same skills, intelligence and commitment that helped you define your SOI will now help you embed it.

Done well, alignment not only builds a stronger business — it also unlocks new efficiencies, improves decision-making, and creates opportunities that benefit everyone.

You’ve set the foundation. You’ve created momentum. Now it’s time to take action.

This part of the playbook is dedicated to showing you how.



## 4.2 BUSINESS FUNCTIONS

If you've led your business through the Identify and Define phases of the SOI process — and resourced it properly along the way — then you've already fulfilled the first task of any good leader: providing the tools and mechanisms needed to reach a shared vision of the future that benefits all.

The next task is just as important: helping the functions of your business come together to make that vision a reality — and guiding your business from what it is today to what it has the potential to become tomorrow.

Search for a list of core business functions and you'll find a familiar line-up: sales, marketing, production, operations, IT, HR, finance, accounting, management. What you won't find is: doing good!

That's the status quo.

SOI flips the status quo by making "doing good" a central business function — and enabling every part of the organisation to align with that purpose.

In traditional businesses, the functions above tend to operate in isolation — often in silos, sometimes even in competition with each other. This separation can fuel rivalries, create confusion, lower reliability and make unity nearly impossible.

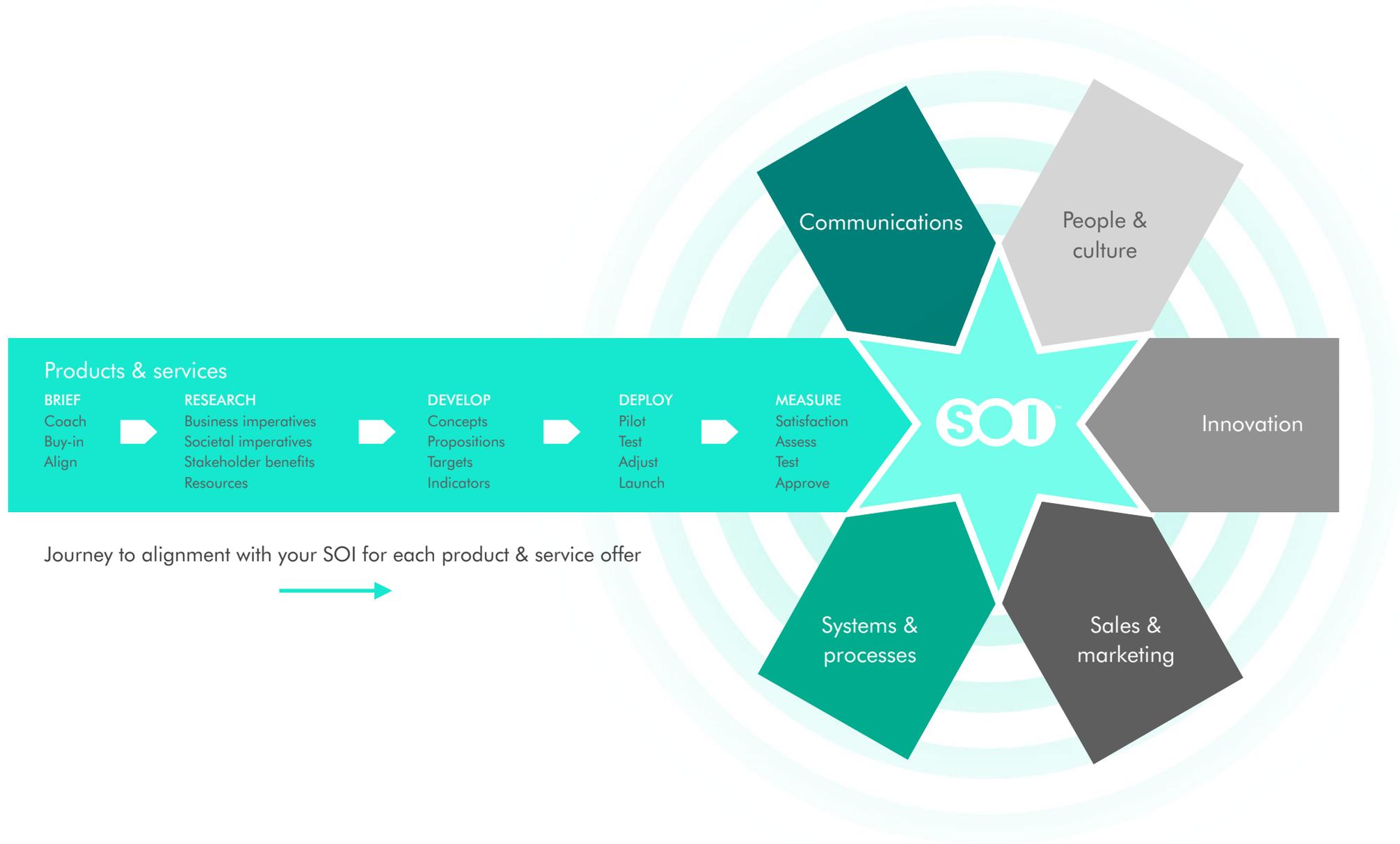
SOI invites a different approach — one where functions are aligned holistically around a shared goal. Rethinking how your business is structured, with your SOI as the top priority, can reduce stress, break down barriers and unlock the many benefits of shared success.

At the root of this shift is cooperation and collaboration. That means giving each business function the time, responsibility, resources and tools to do the work of aligning with the SOI — and to do it well.

The tools that support this process are described on the following pages. But they won't be enough without the right conditions, which must be created and sustained by you.

**Specifically, your role as a leader is to:**

- **Enable alignment**  
Provide the training, development, and resources each function needs to respond to the changes that alignment will require.
- **Lead by example**  
Embody the SOI and the values that underpin it. (We'll come back to leadership in the next section.)
- **Set standards and track progress**  
Define clear objectives and performance measures — and hold your business accountable to them.
- **Communicate the journey**  
Consistently reinforce your direction of travel through all stakeholder communications.



## 4.2/1 PEOPLE & CULTURE

### “Culture eats strategy for breakfast.”

– Peter Drucker

He was right. So the first step to ensuring culture doesn't derail your strategy is making sure everyone is on board.

Let's be honest: that's not easy. But you've already done the hardest part. By involving people from the outset in identifying your values and defining your SOI you've created goodwill, lowered resistance and addressed some of the natural cynicism that comes with change.

The idea of making a meaningful contribution — of being part of something that improves lives and leaves the world better off — is a powerful motivator. Most people want to do just that. Give them the opportunity and the means, and they will.

You only have to think back to the incredible acts of generosity, ingenuity and resilience during the COVID-19 crisis to see that in action.

#### It won't be smooth sailing

At the end of one project I led, the senior management team had tested and agreed on the new strategic framework. Everyone was

aligned — except one. He was a high performer, but he wasn't on board. He had become a spectator (see diagram on the next page).

It was a tough call, but the CEO let him go. It was the right decision — a clear act of leadership guided by the greater good that the SOI and values promised to deliver. It sent a strong signal through the business: this is not just strategy — this is *how we do things now*.

#### Stepping off

There are many ways to introduce your SOI Strategic Framework and what it means for the future.

If you run a small business in one location, bring everyone together on a day that holds some meaning for the company. If your business spans multiple sites, a roadshow is a great way to go.

Whatever format you choose, your launch should feel like a milestone event. Make sure it covers:

- Why being a force for good is necessary
- How the SOI, values, and positioning statement were defined

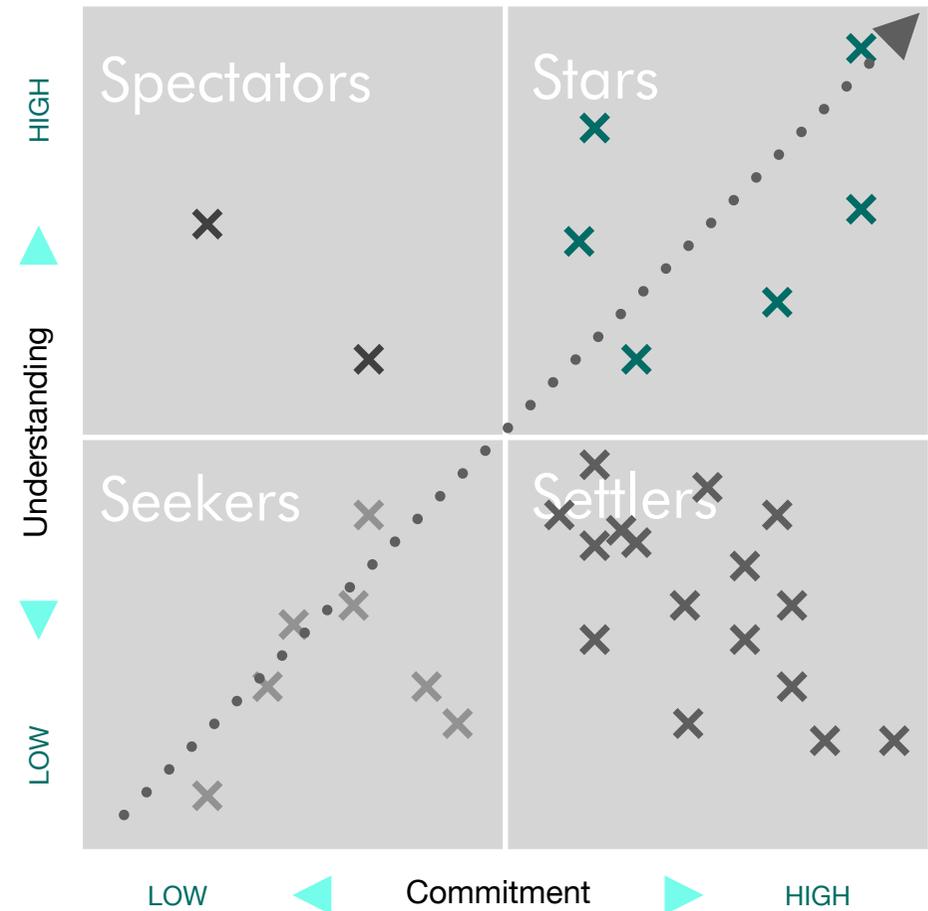
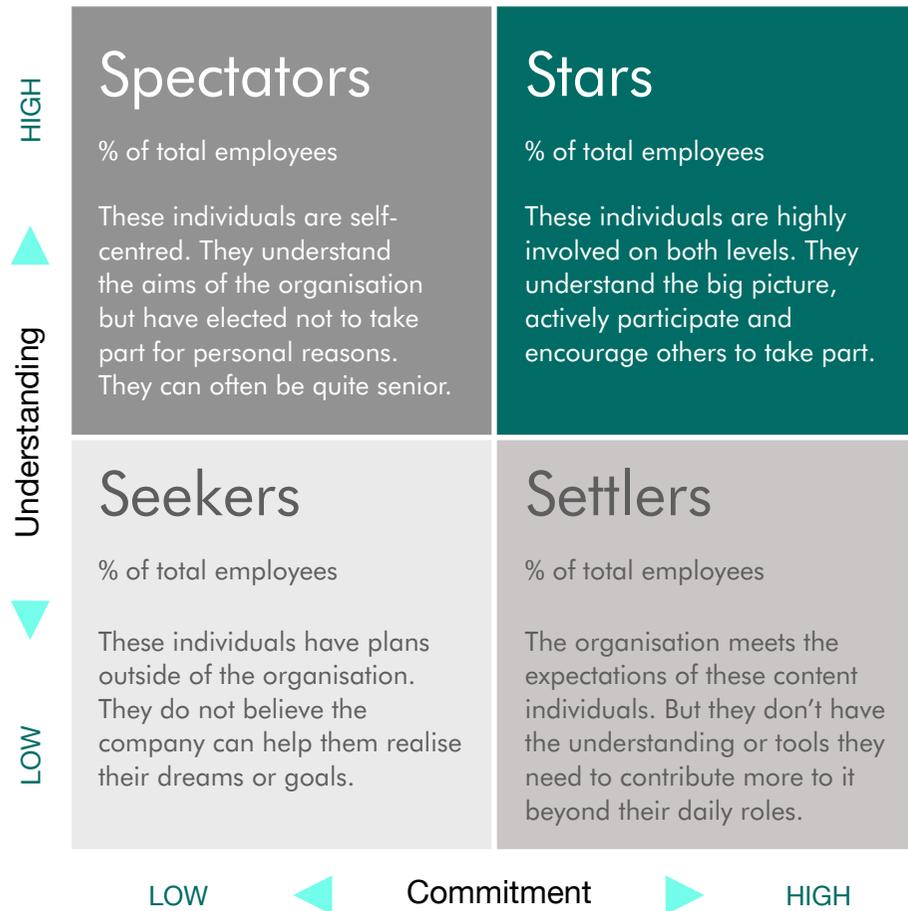
- What will happen next — in both the short and medium term
- Recognition of the achievement so far

Your audience should leave feeling that they're no longer just doing a job. They're contributing to a greater cause — one that will fulfil them as individuals, transform the business they work for, and positively impact the world around them.

#### Humanising business

Yes, your strategic framework will likely be introduced from the top — so make sure you underline, at every opportunity, the collaboration it took to create it. Emphasise the empathy, the camaraderie, and the collective thinking that made the SOI possible.

Aligning with the SOI will bring changes to systems and operations. But at its core, it will humanise your business — giving people the freedom to succeed and the opportunity to define, achieve, and celebrate new kinds of success.



**Settlers to Stars** Businesses where staff have a clear understanding of an objective that they care about and have the tools needed to help achieve that objective out-perform those that don't. Successful alignment with your SOI empowers employees, giving them a sense of personal fulfilment and shared purpose. For the business, it enhances levels of performance, increases employee retention figures and, ultimately, delivers better stakeholder experiences.

**Who's contributing?** Assessing the degree of employee alignment with your SOI goes beyond traditional HR filters. Its objective is to quantify the degree to which the role of the employee impacts on delivering outcomes that align with and underpin the SOI.

The values, beliefs and behaviours of your people are the single biggest factor in determining how successful alignment with your SOI will be.

Put simply: no matter how well-crafted your strategy is, it won't take hold unless everyone understands the importance of your core values — and how they guide what gets done, how it gets done and why it matters.

The goal is not just understanding, but ownership. For alignment to be real and lasting, people need to *feel* the values — not just hear them. A good place to start is helping people connect these values to their own lived experience. That means making the link between personal decision-making and the business's collective goals. When that connection clicks, everything changes.

This simple one-hour workshop does exactly that — surfacing what people believe in, how that shapes their actions and where their values overlap with the business's core commitments.

### Step 1 – Working in pairs

Each person asks their partner:

“What do you feel are the most important values to you personally?”

They write down each value and its meaning in the speaker's exact words — because language matters and different words carry different meanings. Then they swap roles.

### Step 2 – Ranking

With both lists complete, each participant reflects and ranks their own values.

Which ones are always important?

Which ones are sometimes important?

Where values overlap, they're combined into no more than five core entries.

### Step 3 – Group discussion

Once the influence of personal values is understood, the group discusses how these values can support — or challenge — the business's stated values. This opens the door to greater empathy, more meaningful dialogue and a deeper sense of shared purpose.

Tip: A version of this exercise can be introduced during recruitment. It not only helps attract the right people, but signals early on that values are something your business *lives*, not just talks about.

### Living and breathing it

Your core values are not decoration. They are the architecture of your culture and the mechanism by which your SOI is translated into everyday behaviour. They must be actively upheld — and visible in the way the business hires, promotes, manages, and recognises people.

That means:

- Employee performance should be evaluated against your values.
- Hiring and firing decisions should be based on alignment with them.
- Recognition and promotions should celebrate those who bring them to life.

When explained clearly and consistently modelled, values bring clarity, unity and meaning to even the most complex tasks — and help humanise your business in ways that resonate far beyond the workplace.

### Standing together

Leadership is not a title — it's a demonstration. While living your SOI and values is an expectation for everyone, people in different roles have different opportunities to influence progress. Their efforts should be acknowledged.

### Leaders should be recognised for:

- Convincing stakeholders that the SOI creates value for all
- Driving and directing transformation
- Modelling the change they want to see

### Managers should be recognised for:

- Coordinating alignment across teams
- Creating space for collaboration
- Nurturing a shared culture of success

### Staff should be recognised for:

- Participating in alignment efforts
- Providing honest feedback and ideas

### Celebration

Recognition — not reward — is the key. Doing the right thing doesn't need a trophy, but it must not go unnoticed. Milestones, however small, deserve to be shared and celebrated.

These moments build energy, reinforce purpose, and remind people they are part of something bigger. That's how culture is shaped — not by slogans, but by stories of progress and pride. People are the pulse of your business — and culture is the force that drives it forward, or holds it back. When aligned with your SOI, culture becomes your most powerful ally. But alignment isn't automatic; it takes intention, trust, and consistency. You've already done the hard work by involving your people from the start — now, it's about making values lived, not laminated. Set expectations. Recognise efforts. Celebrate progress. And never stop reinforcing

the shared purpose that binds everyone together. This is how strategy becomes culture — and how your culture becomes the engine of sustainable, meaningful business success.

## 4.2/2 INNOVATION

Very few businesses run innovation programmes that genuinely involve staff and stakeholders in shaping new ideas.

Many invest in R&D for products and services — but that's not the same as building a mechanism to nurture ideas that can engage and improve the whole business, its value chain and the ecosystem beyond.

With your SOI now at the core you have a rare opportunity to build on the momentum and collaboration already in motion.

This is your chance to:

- Launch new initiatives
- Stop wasteful or outdated practices
- Identify and scale what's already aligned with your SOI

As soon as your SOI is validated, you can invite staff and stakeholders to help co-create an innovation programme — one that's uniquely yours, and branded with a name and slogan that links directly to your SOI.

Dedicating time and energy to bringing your SOI to life in this way gives you a practical, repeatable mechanism for generating ideas that solve real-world problems — and strengthens your business from the inside out.

An SOI-led innovation programme does more than deliver improvement. It creates:

- Forums for dialogue
- Pathways for collaboration with networks and partners
- A flow of stories and examples that build momentum and trust

The framework shown on the next page is a model that should be adapted to suit your context.

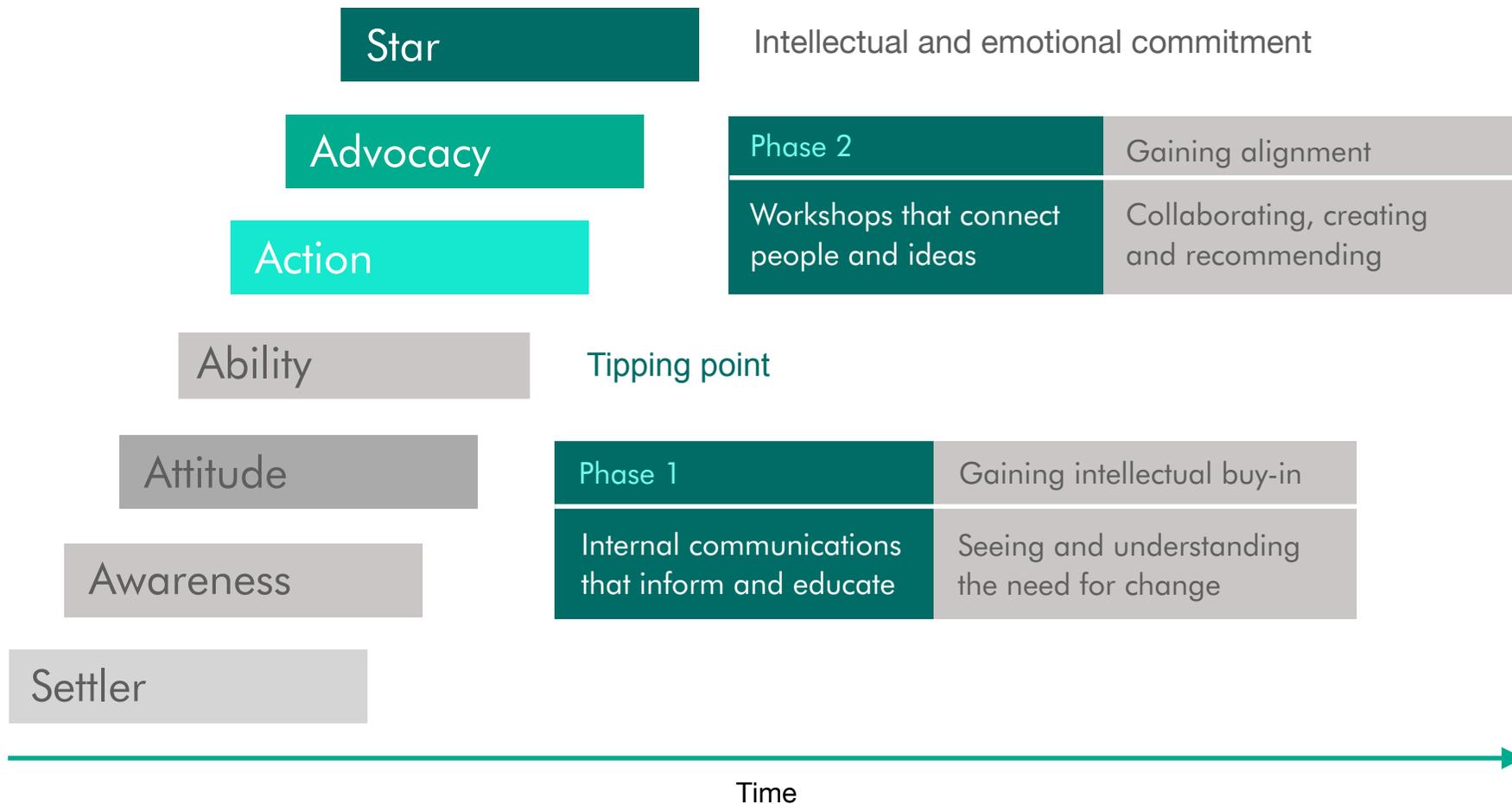
Consider how companies like Toyota and Google have embedded innovation:

- Toyota's *Always a Better Way* programme empowers employees to suggest improvements that maximise quality, minimise waste, and drive continual progress.

- Google's 70-20-10 policy encourages every employee to allocate:
  - 70% of time to core duties
  - 20% to projects that advance the business
  - 10% to personal, growth-focused innovation

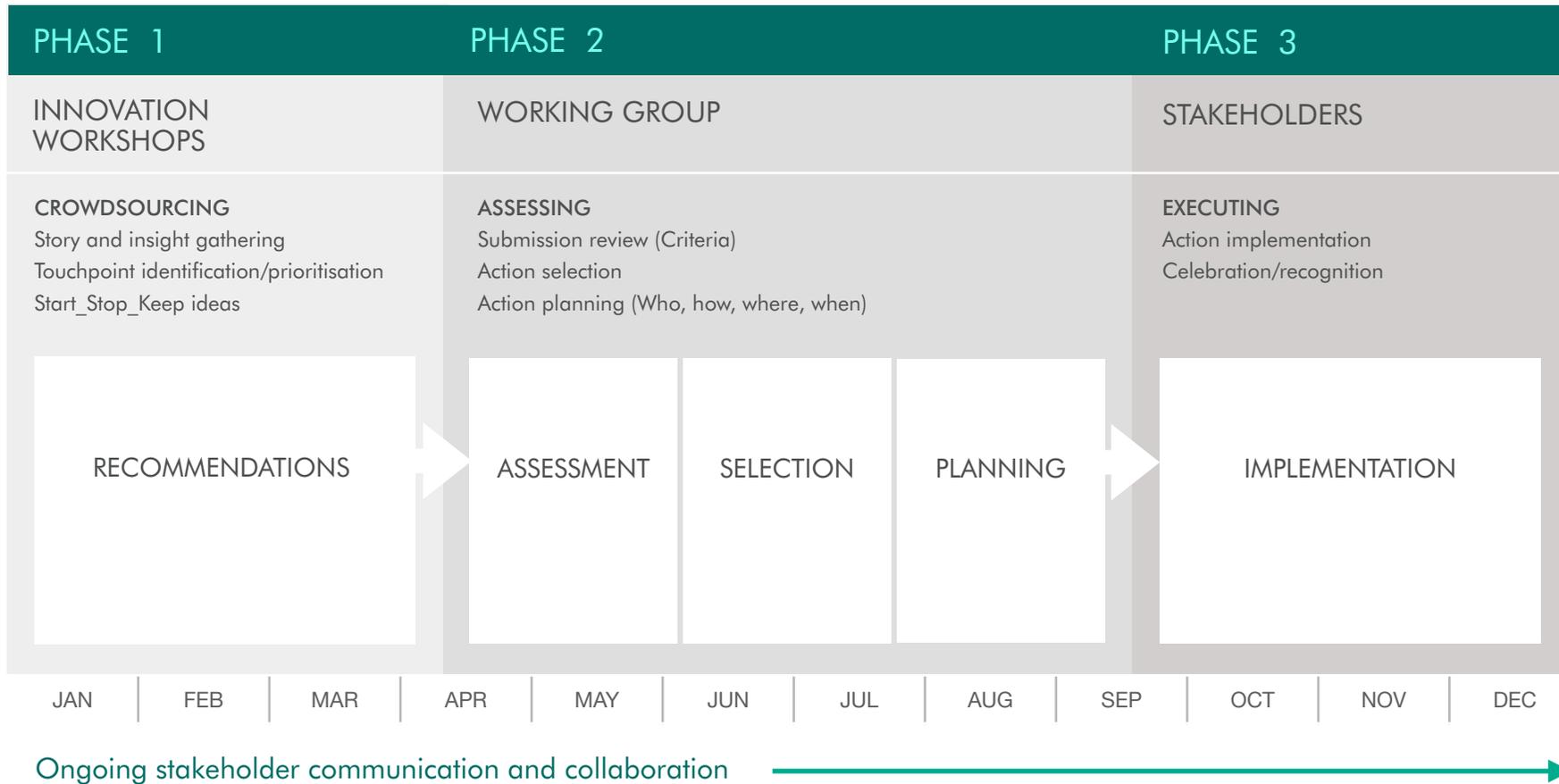
The result? A steady stream of new thinking aligned to Google's core idea of universal accessibility, and a culture that takes pride in pushing boundaries.

In short, an innovation programme inspired by your SOI won't just energise your business — it will strengthen trust, increase advocacy and build stakeholder loyalty through meaningful, continuous contribution.



**Tipping point** SOI encourages a culture of collaboration and innovation that, in turn, generates ideas that make things better for all involved. Getting to the high-performance culture this creates is a journey that takes practical plans, time and leadership.

## SOI Innovation program



This graphic outlines a year-long process divided into three collaborative phases: gathering insights and ideas, assessing and planning actions and implementing changes with stakeholder involvement. Ongoing communication and collaboration are key throughout all stages to ensure alignment and momentum.

## 4.2/3 PRODUCTS & SERVICES

The success of your business ultimately depends on the satisfaction your customers gain from using the products and services you sell.

Creating products and services that are *fit for the future* is exactly what aligning with an SOI is all about.

You may already have offerings that don't fit with your SOI. They might still be profitable — and walking away from them won't be easy. But this is where the rubber meets the road. Choosing to cease activities that aren't sustainable will speak volumes about your integrity. Committing to developing ones that are — will speak even louder.

### Better by design

I studied design at university and ran a successful design consultancy in London for nearly a decade. The process of designing has shaped how I think — not just about products, but about organisations, systems, and strategy.

Of all the principles I've worked with, the one I return to most is simplicity. Keeping things simple avoids complexity and leads to authenticity — which in turn drives better outcomes and greater satisfaction. The idea that *less is better* couldn't be more relevant today.

The late, great German designer Dieter Rams captured this perfectly in his 10 principles of "Good Design." For anyone committed to sustainable product development — and I'd argue, sustainable business — these are essential:

1. **Innovative** – Design evolves with technology but must never be an end in itself.
2. **Useful** – Good design prioritises functionality, psychology, and aesthetics.
3. **Aesthetic** – Beautiful, well-executed objects improve wellbeing.
4. **Understandable** – A product should be intuitive and self-explanatory.
5. **Unobtrusive** – Design is neutral; the product is the tool, not the art.

6. **Honest** – It doesn't pretend to be more than it is. No manipulation.

7. **Long-lasting** – It avoids trends. It endures.

8. **Thorough** – Every detail matters. Nothing is left to chance.

9. **Environmentally friendly** – Design must conserve and protect.

10. **Minimal** – "Less but better." Focus on the essentials.

Guided by your SOI these principles can help ensure your offerings appeal to the growing number of customers, workers, and investors who are seeking businesses that improve their lives *and* contribute to a better world.

### Alignment in action

Alignment with your SOI brings discipline and purpose to how you review, improve, and design your products and services. The framework below outlines the five core phases:

#### Phase 1 – Introduce

Ensure product and service development teams are fully immersed in your SOI Strategic Framework — understanding it as the reference point for all future innovation.

#### Phase 2 – Research

Explore consumer preferences and market opportunities. Define product/service requirements and create execution plans for a successful launch.

#### Phase 3 – Develop

Build prototypes, assess concepts, and apply social and environmental standards. Draft a clear explanation of what the product/service does — and how it aligns with your SOI.

#### Phase 4 – Deploy

After passing internal or external quality checks, launch the prototype or pilot service commercially and make it widely available.

#### Phase 5 – Measure

Monitor feedback, gather insights, and improve the offer in line with your SOI. Learnings should inform the lifecycle management of current and future offerings.

When designed with intent and aligned with purpose, your products and services become more than just offerings — they become expressions of your SOI in the world.

Every product or service your business puts into the world is an opportunity to express what it truly stands for. When those offerings are aligned with your SOI, they become more than just vehicles for profit — they become tangible expressions of your purpose, integrity, and ambition to make a positive difference. That difference is something your customers, employees, and investors will feel. And it's something they'll remember.

In a world of increasing choice and rising expectations, people are no longer just buying what you sell — they're buying into what you believe. If your products and services reflect your values and deliver meaningful outcomes, they will build deeper loyalty, attract new audiences, and drive lasting value. When they don't, they risk becoming part of the noise.

SOI-aligned offerings stand out — not because they shout the loudest, but because they ring true. Designed with care, delivered with clarity, and measured against impact, they show the world that your business means what it says — and is here to shape the future, not just survive it.

## 4.2/4 COMMUNICATION

It's vital that all your stakeholders — especially employees — understand your SOI is central to your business's future success.

The positive change it brings must be clearly signalled, but tread carefully. With SOI communications, caution and transparency are essential.

How, when, and where you talk about your SOI needs serious thought. Every message should be risk-assessed, with a stage-gate communications plan to ensure your language aligns with strategy — not slick marketing spin.

The key is acknowledging the gap between aspiration and reality. Early messages should be modest:

- Reinforce the SOI's importance
- Invite contributions
- Avoid grand promises to change the world

BP's infamous "Beyond Petroleum" campaign failed because much of the business didn't match the claim. In his 2015 book *Connect*, CEO Lord John Browne admits his biggest regret

was not managing the gap between rhetoric and reality. Even a slight tweak — "Going Beyond Petroleum" — would have been more honest and far less damaging.

The lesson: don't over-claim. Let actions lead — and ensure communications follow.

In my experience, advertising and PR agencies need careful oversight. Even well-intended creativity and campaign thinking can damage trust if it misrepresents your journey. A misstep here risks undoing the hard work of identifying, defining, and embedding your SOI.

### Create a two-way dialogue

One of the smartest ways to manage SOI communication is to set clear goals and report on progress. This builds a shared journey with stakeholders — one that builds trust, deepens engagement, and enhances reputation.

It also helps you:

- Understand priorities
- Act on feedback
- Drive performance

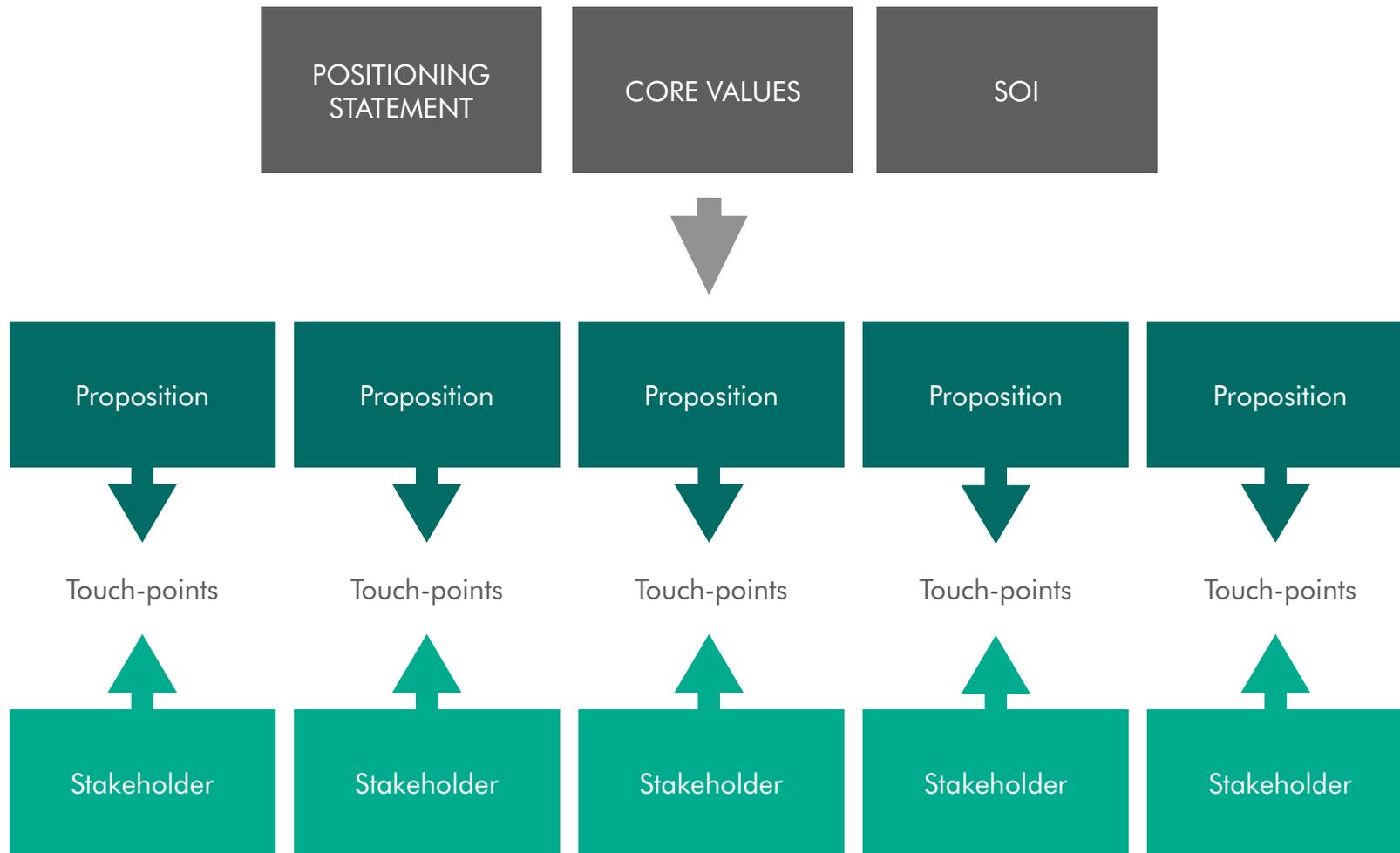
### Use every channel wisely

Your website, labels, social platforms, events, and reports are powerful tools for:

- Sharing achievements
- Backing them with credible data
- Demonstrating your SOI in action

The goal isn't spin. It's substance. Your SOI is not a campaign — it's a commitment.

### SOI Strategic Framework



**Clarity, consistency and character** Successes resulting from your SOI will bring substance to your messages and enhance the value propositions you present to your stakeholder audiences. A disciplined approach that always refers back to your SOI will also ensure clarity and consistency at key touch-points.

## 4.2/5 SALES & MARKETING

Your marketing strategies — and how you sell your products and services — will need to be reviewed and realigned to reflect your SOI.

Like most businesses, yours has likely been shaped by market demands. That often means chasing the dollar, which can trigger reactive behaviour:

- Constantly reframing your value proposition
- Creating sub-brands
- Rushing out new offers to follow trends

Sales and marketing can end up leading the business, pulling the entire organisation into a cycle of endless adaptation.

The usual advice? “Adapt or die.” But your SOI passed the stress test — it’s built to last. It offers a proactive, long-term strategy that remains relevant despite changes in markets, management, or technology. And it appeals to a growing, more conscious segment of the market.

Here’s the shift:

Sales and marketing are no longer leading. Your SOI is.

### Focused, informed and credible

With everyone aligned around one strategy and a clear customer type, you no longer need sprawling, unfocused research. Now, research becomes targeted, cost-effective, and grounded in meaning.

That focus sharpens everything:

- Your brand messages, symbols, and slogans reflect your SOI and resonate with your audience’s real needs and values
- Your routes to market — in person, online, or direct — are more intentional, aligning with your purpose
- Every “moment of truth” becomes a chance to reinforce trust

### From fluff to follow-through

Your SOI eliminates the gap between marketing promises and operational delivery. Initial sales and CRM efforts are no longer backed by marketing alone — they’re backed by your entire business, united around a shared idea.

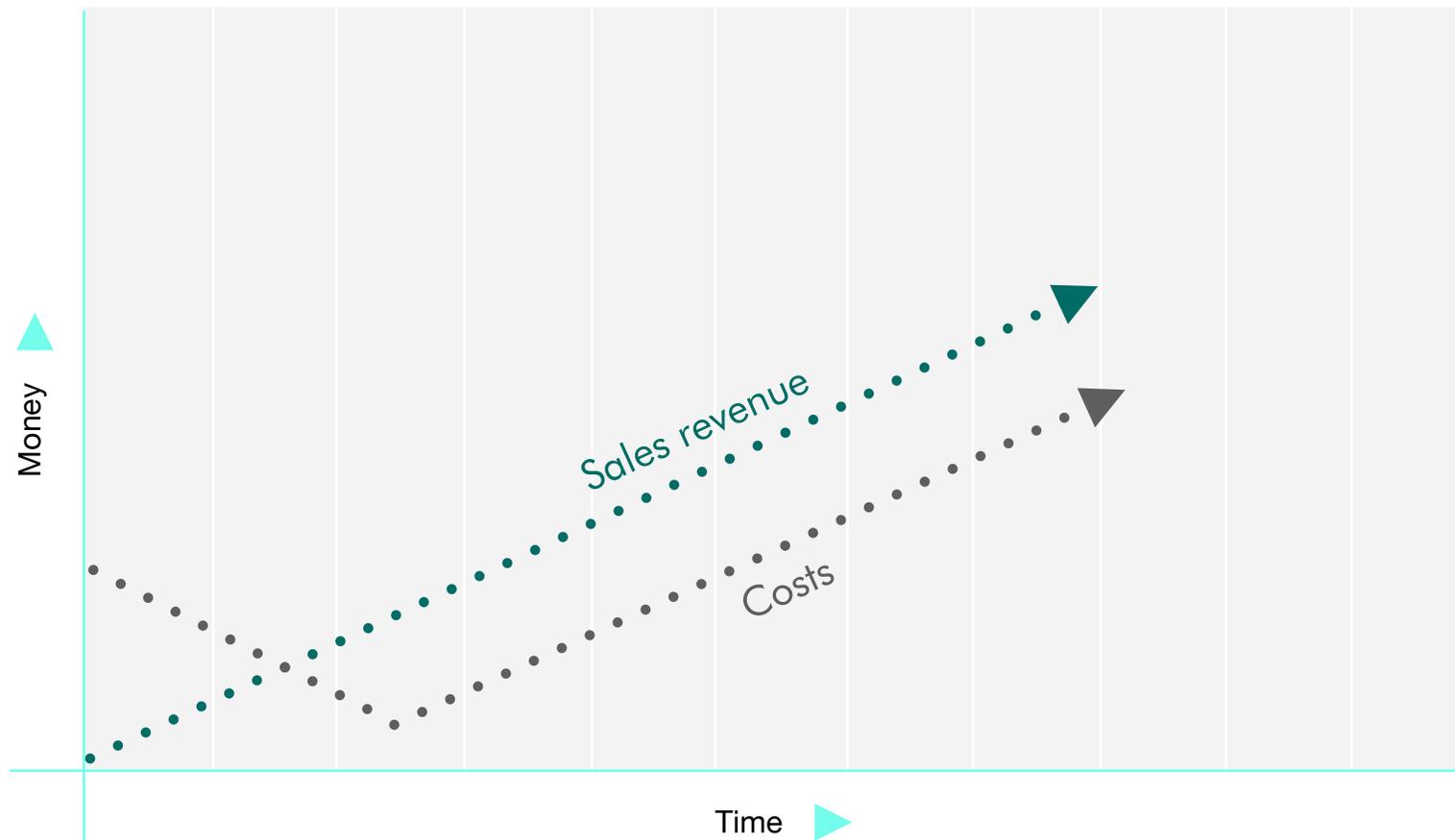
This makes CRM more consistent, credible, and able to build lasting customer relationships. If you position your business as a force for good, your customer experience must reflect that — every time.

### Feedback that fuels progress

Regular surveys and feedback loops go beyond satisfaction scores. They:

- Identify areas for improvement
- Demonstrate your difference
- Show the impact you’re making

They close the loop between purpose and performance — helping you evolve in line with what truly matters.



**Lets thrive** This is the simplest graphic in the whole book. Your business needs to be profitable to cover its costs and some. The some (or profit) is what you use to prepare for and invest in the future. You need to make a profit if you are going to make a difference. The objective is not to maximise profit, however, it is to maintain the profitability required to thrive and deliver your SOI related objectives.

## 4.2/6 PROCESSES & SYSTEMS

Your processes and systems affect every corner of your business — from productivity and innovation to marketing, finance and people.

Having a clearly defined SOI allows you to set focused, purposeful objectives that channel your internal effort, time, cost, and resources into delivering meaningful external results.

Translating your SOI into clear objectives that guide your operations ensures you are properly organised to turn your intention into action. Without this, your SOI — no matter how compelling — risks being remembered as nothing more than a well-meaning phrase.

Objectives bring your SOI to life. They focus people's energy. They define priorities. They drive performance.

### From intention to execution

A systematic review of your processes, systems, policies and standards will help identify what fits with your SOI — and what doesn't.

Be prepared: just as defining your SOI may have challenged established thinking, aligning your

processes will likely mean overhauling, or even abandoning, systems that have never been questioned before.

It won't always be comfortable — but it will be necessary.

### Setting objectives that drive change

The objectives you set should be viewed as standards — the commitments your business makes to live its SOI day-to-day.

They're not outcomes in themselves — they are the means to reach your outcome: alignment with your SOI and the meaningful difference that creates.

While you have one SOI, you'll need multiple objectives across your business. These will help people:

- Make the right decisions
- Raise standards
- Improve efficiency
- Measure progress
- Stay accountable

Your objectives should feel practical and motivational — not theoretical or top-down. They should be:

- Clear and unambiguous
- Easy to understand
- Aligned with deadlines
- Anchored in accountability

### Making it tangible

The more efficiently you run your business, the greater your value to your customers and contribution to society will be.

Great businesses are built when internal actions lead to the consistent delivery of external promises.

Objectives ensure your processes and systems convert an intangible idea into a tangible reality — one aligned with your SOI and everything it stands for.

## SOI Reward and recognition scheme

INNOVATION AWARDS	CULTURE AWARDS	COMMUNITY AWARDS
Staff teams recognised and rewarded for start-stop-keep ideas that support your SOI	Individuals recognised and rewarded for actions/behaviours aligned with the values that support your SOI	External ecosystem partners/partnerships recognised and rewarded for start-stop-keep ideas that align with your SOI
Awarded annually Judgement by leadership Managed by peer elected team	Awarded annually/monthly Judgement by peers and leadership Managed by elected working group	Awarded annually Judgement by leadership Managed by elected working group
Reward value/type Rankings/categories	Reward value/type Rankings/categories	Reward value/type Rankings/categories
Assessment criteria Alignment with SOI Potential impact Return on investment (ROI) Implementation speed	Assessment criteria Alignment with values Impact of actions/behaviour	Assessment criteria Alignment with SOI Potential impact
Communications Pre-award campaign Award publicity Post-award publicity	Communications Pre-award campaign Award publicity Post-award publicity	Communications Pre-award campaign Award publicity Post-award publicity
Event(s) responsibility, planning, management and costing		

**Recognising performance that makes a difference** Reward and recognition schemes create a sense of shared pride in your staff, they help retain key people and can attract high performers. The advantage of a scheme linked to an SOI, such as the one illustrated here, is the motivation behind the scheme is beneficial not just to your business but also to the individuals and ecosystem partners who take part in it.

## 4.3 SOI ALIGNMENT CANVAS

The SOI Alignment Canvas is your master template — a visual tool that captures how and when your business will turn ideas into action and deliver outcomes that matter to your organisation and its stakeholders.

Think of it like this: If your SOI is the guiding star that sets direction, the Alignment Canvas is the map showing you — and your stakeholders — how to get there, at a glance.

Printed on a large laminated surface, it's a hands-on tool designed for real collaboration. Gather your team around it with Post-its, stickers, and markers to explore, plan and prioritise what alignment looks like across your business.

To keep it relevant, your canvas must be a living document — updated regularly as your idea of “thriving” evolves and your strategy progresses.

### What the canvas captures

The SOI Alignment Canvas has 3 core blocks:

#### 1. Your SOI Strategic Framework

On the left, you lock in the three elements that guide every decision. These are your non-negotiables — the foundation for everything:

- Your Single Organizing Idea
- Your core values
- Your positioning statement

#### 2. Business function commitments

The central space is where input from across your organisation — especially from your innovation programme — is captured and shaped.

Each function is asked:

“If we’re to align our part of the business with our SOI, what should we start, stop or keep doing?”

Responses typically generate a long list. These are filtered and prioritised into clear commitments across the short, medium and long-term.

#### 3. Goals and resources at a glance

On the right-hand side, you record the final list of selected commitments — now elevated to strategic goals. For each one, include:

- A delivery deadline
- Who’s responsible
- Estimated costs

Below this, summarise:

- Total costs by timeframe
- Key partnerships needed
- A resource overview (people, tools, knowledge)

This section pulls together all the moving parts into one clear view.

### From template to transformation

The canvas is your shared plan — a visual reference point for progress. The finer detail can live in a supporting document, but this is where alignment becomes visible and collaborative.

Like all tools in this playbook, the canvas is yours to adapt. Tailor it to suit your business, your people and your way of working.

It’s more than a tool. It’s a declaration of intent — and a map to turn that intent into measurable, shared success.



## KEY POINTS



Your business and the world needs action. Implementing your SOI turns good intentions into actions by systematically coordinating all your business functions with it.



It will take time, effort and patience to align, but the process will unleash new opportunities and new levels of commitment from staff, customers, and investors who see the benefits for themselves.



A business-wide search for innovations related to your SOI will further stimulate colleagues – and earn the trust, advocacy and loyalty of all your stakeholders.



Stopping unsustainable products and services will speak volumes about you and your business. Committing to developing new ones will crank up that volume even more.



Announcing goals related to your SOI and reporting on progress is a smart way to manage communications and will help you take your stakeholders on the journey with you.

## CHAPTER 5 :

# MEASURE

How you measure the impact of your SOI. These tools will help you understand the difference your business is making in real time.

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- 5.1 SOI learning loops
- 5.2 Internal performance metrics
- 5.3 Internal impact metrics
- 5.4 External learning loops
- 5.5 Learning to thrive



SINGLE ORGANIZING IDEA

## 5.1 SOI LEARNING LOOPS

How do you know if your SOI is delivering real value — commercially and socially?  
Is it working as intended? What's the impact?

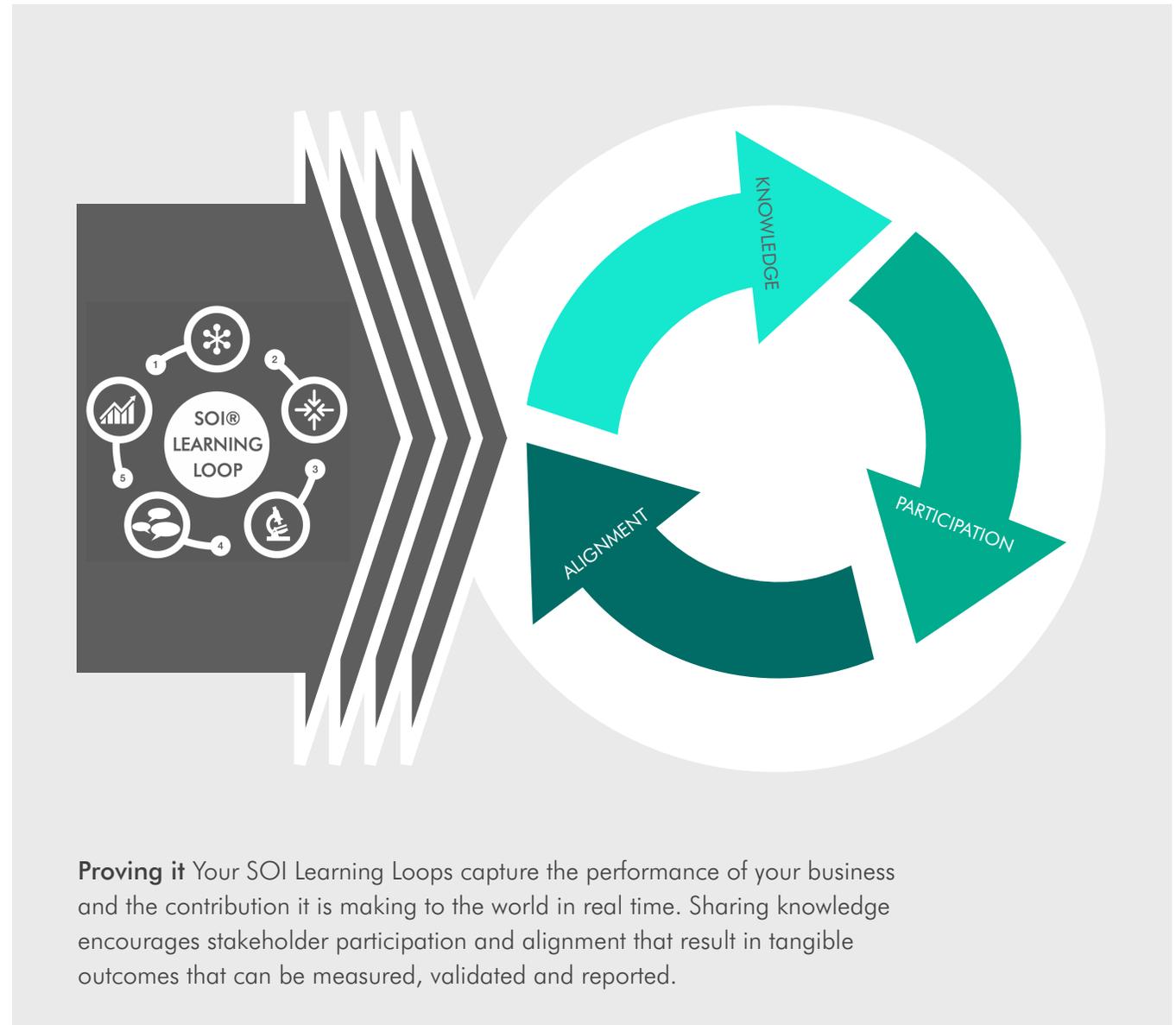
The best way to answer these questions is to measure alignment — and to do it together with your stakeholders.

Creating an SOI Learning Loop with each of your key stakeholder groups gives you access to a steady flow of insights — a drumbeat of metrics, reflections, and actions that show whether your SOI is gaining relevance and momentum. It's not just about gathering data — it's about building relationships, improving decision-making and ensuring your SOI is always grounded in reality.

### Why it matters

In the early days of implementing your SOI, engaging stakeholders through regular feedback loops creates a virtuous cycle:

- Understanding leads to awareness
- Awareness leads to engagement
- Engagement leads to loyalty and trust



Crucially, it also builds a culture of learning — one that says: we’re not just doing business as usual. We’re doing business differently. We’re listening, we’re evolving and we’re willing to act.

It’s also a powerful way to demonstrate integrity. In a world where trust in business remains fragile, regularly reporting back — and taking action — shows your stakeholders that you’re not only walking the talk, but that you’re doing so with them, not to them.

### Making it happen

#### Step 1: Design

Start by deciding what you want to measure — and that means crafting the right questions.

Ask questions that uncover two things:

- *Performance* – Are the key elements of your SOI being lived and demonstrated?
- *Impact* – Do stakeholders recognise how your SOI delivers value to them and to society?

Involve people in shaping the questions. This simple step helps build trust and ensures you’re asking what matters most to them — not just what’s easy to measure.

#### Step 2: Collect

Run short surveys at key stakeholder touch-points (you’ll have identified many during the Identify phase). Keep surveys light and conversational — more of an enquiry than a formal investigation. Aim for just 2–4 questions per survey. If you have a longer list (say 12 questions), rotate them across multiple micro-surveys. This approach ensures the process feels light, agile, and participative.

Make participation meaningful. Frame surveys with stories or facts about your SOI in action. Don’t shy away from sharing the real challenges you’re facing — people respond well to transparency. And always make this clear promise:

- You will report back on what you hear
- You will involve stakeholders in shaping what happens next

That turns the survey from a one-way transaction into a two-way relationship.

#### Step 3: Analyse

Now review your data — and remember the rule: Keep It Simple.

Tailor your analysis to each stakeholder group and the way they interact with different functions of your business. Look for:

- Themes and differences between groups
- Variations by age, gender, tenure, or location
- Surprises or tensions (e.g. “Why do staff and customers see this issue so differently?”)

Where possible, bring in comparative baselines — from previous surveys, industry standards, or peer benchmarks — to sharpen your insights. The point isn’t to prove you’re perfect, it’s to identify where progress is needed and where alignment is already working well.

#### Step 4: Discuss

This is the make-or-break step.

Report back to stakeholders. Share the findings — and use them as the springboard for co-creating solutions.

These solutions are what we call *alignment actions*: tangible changes that bring values, behaviours, and results into closer alignment.

It's not always practical to involve everyone in the co-design, but communication is key.

Whether it's a team meeting, email update or social post, make sure stakeholders understand:

- What you heard
- What you're doing in response
- That their voices are shaping the journey

Use these results to tee up your next round of surveys. This kind of transparency builds trust — and keeps the loop turning.

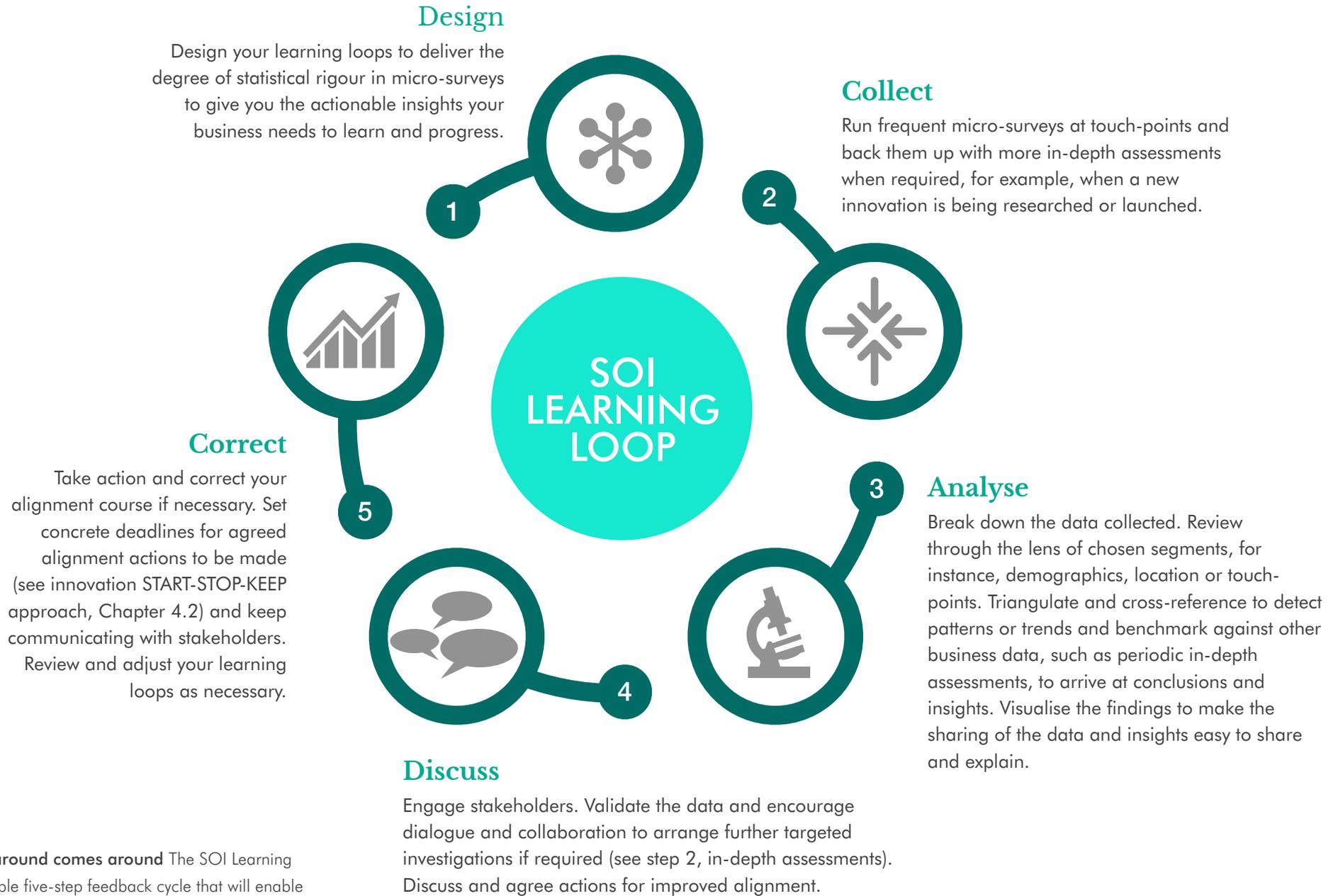
#### Step 5: Correct

This final step restarts the loop.

Take the agreed actions. Track them in future micro-surveys. Ask your stakeholders whether things have improved — and keep listening.

Highlight the changes publicly — and the collaborative process behind them. When people can see that their voices helped shape the future of the business, they become even more committed to its success.

The SOI Learning Loop isn't just about measurement. It's about momentum, accountability, and turning insight into action — together. It's how your SOI stays relevant, real, and capable of creating lasting impact.



**What goes around comes around** The SOI Learning Loop is a simple five-step feedback cycle that will enable your business to build momentum and progress by regularly engaging with your various stakeholder groups.

## 5.2 INTERNAL PERFORMANCE METRICS

Here's a list of propositions to help assess internal performance and SOI alignment through your staff learning loop. External stakeholder input is covered in the next section.

### 1.0 Focus

- 1.1 My business has a sustainable call to action (SOI) at the core that drives the entire organisation.
- 1.2 Our SOI has a clear results path that shows how our actions lead to positive contributions to society.
- 1.3 My business has set long and short-term goals to ensure it achieves alignment with its SOI.
- 1.4 My business has clearly defined values that underpin the SOI.
- 1.5 My business has a positioning statement that clearly explains the benefits of the SOI.

### 2.0 Leadership

- 2.1 Leaders in my business actively promote the benefits of the SOI consistently and clearly internally and externally.
- 2.2 Leaders in my business demonstrate the SOI and values through their own individual actions.

2.3 Leaders in my business spend planned time with staff talking about the SOI and the successes of the strategy and its future potential.

### 3.0 Communications

- 3.1 My business clearly communicates its objective and value to stakeholders.
- 3.2 My business encourages stakeholders to engage in its societal objective.
- 3.3 Our stakeholders are actively participating and interacting with our communication efforts.
- 3.4 My business achieves the levels of third-party advocacy required to support its objectives.

### 4.0 Products & services

- 4.1 My business delivers stakeholder experiences that clearly demonstrate our SOI.
- 4.2 My business delivers products and services across the board that are fit for a sustainable future.

### 5.0 Processes & Systems

- 5.1 The functions of my business all have objectives that are aligned with the SOI.
- 5.2 The SOI and values inform sustainable procurement, HR, IT, and operational policies.

5.3 My business invests in technology aligned with the SOI to deliver sustainable outcomes.

### 6.0 Innovation

- 6.1 My business is helping to change status quo thinking in its industry sector.
- 6.2 My business uses its SOI to constantly innovate.
- 6.3 My business gathers feedback from its ecosystem to learn and improve.
- 6.4 My business regularly taps into the collective intelligence of its staff to refine or develop new ideas.

### 7.0 People & culture

- 7.1 My colleagues and I get the support we need to realise the SOI and its values.
- 7.2 My business has performance indicators that detect staff actions and behaviours that align with the SOI.
- 7.3 My business rewards staff actions and behaviours that align with the SOI.
- 7.4 My business does not tolerate actions or behaviours that do not align with its values.
- 7.5 My business regularly celebrates successes related to the core objective.

**Here and now, not then and there.** Your SOI led business is a living organism, not a machine. This micro-survey turns propositions into questions so you can tap into what people are thinking and feeling here and now.

### SOI Learning loop // Micro-survey #03/2025

Please answer this short two question survey. It should take less than two minutes.

The survey is completely anonymous. Nobody will know what you, or any other individual, writes in this survey.

Please tell us what you truly feel! We will share the results of the survey and discuss them with you.

**Question 1:** Are you protected from pressures of any kind to perform tasks or work that are not consistent with our SOI? (0=not at all; 10=very much)

0
  1
  2
  3
  4
  5
  6
  7
  8
  9
  10

**Question 2:** Do you have the relationships and support that you need to contribute to our SOI? (0=not at all; 10=very much)

0
  1
  2
  3
  4
  5
  6
  7
  8
  9
  10

**Question 3:** What is your gender?

Male
  Female
  Other

**Question 4:** What is your age?

18-22
  23-38
  39-54
  55-73
  74+

Thank you for contributing your thoughts. Your response helps us ensure we progress in the right way together.

## 5.3 INTERNAL IMPACT METRICS

Alignment with an SOI will deliver positive short, medium and long-term impacts on your business and the stakeholders that surround it. You will see and experience the short and medium-term impacts of alignment with your SOI, but the long-term impacts may only emerge after some years. Remember, your business is part of an ecosystem in which you and your business are playing an important but shared role.

Having a positive impact is what SOI is all about, and understanding where it is happening is gained by posing two types of impact-focused enquiries through your system of SOI Learning Loops that tap into the ecosystem.

The first enquiry asks stakeholders what changes they are seeing as a result of your SOI. The second sizes up the quality of relationships that underlie your contributions to society.

Only open relationships of trust and mutual respect achieve success, so taking a regular pulse check to see how those relationships are doing is vitally important.

As with the performance metrics propositions, the stakeholder survey request is to rank two impact questions: The degree of 'perceived change' and the 'quality of relationships' on a scale of 1 to 10 (0 = not at all, 10 = very much). These questions are directed at staff to gain the internal view; the list for external stakeholders follows later on.

### 1.0 Perceived change

- 1.1 Are there positive changes as a result of the SOI?
- 1.2 Are these unintended as a result of the SOI?
- 1.3 Is the SOI contributing to a high performance culture in the business?
- 1.4 Are the values and SOI are contributing to an inclusive culture at the business?
- 1.5 Do staff believe in and work to realise alignment with the SOI and values?

### 2.0 Quality of relationships

- 2.1 Is it worth your effort to engage in the SOI to make it more effective?
- 2.2 How much does the SOI try to address what is important to you?

2.3 Can you hold leaders accountable for your SOI?

2.4 To what extent does the SOI foster better collaboration and cohesion in your business ecosystem?

2.5 Do business leaders act on the feedback about the SOI that you and others give them?

2.6 Do you feel safe advancing your business's contributions to society at the expense of short-term profits?

2.7 Do you feel encouraged and supported to adapt SOI plans and activities based on new evidence and learning?

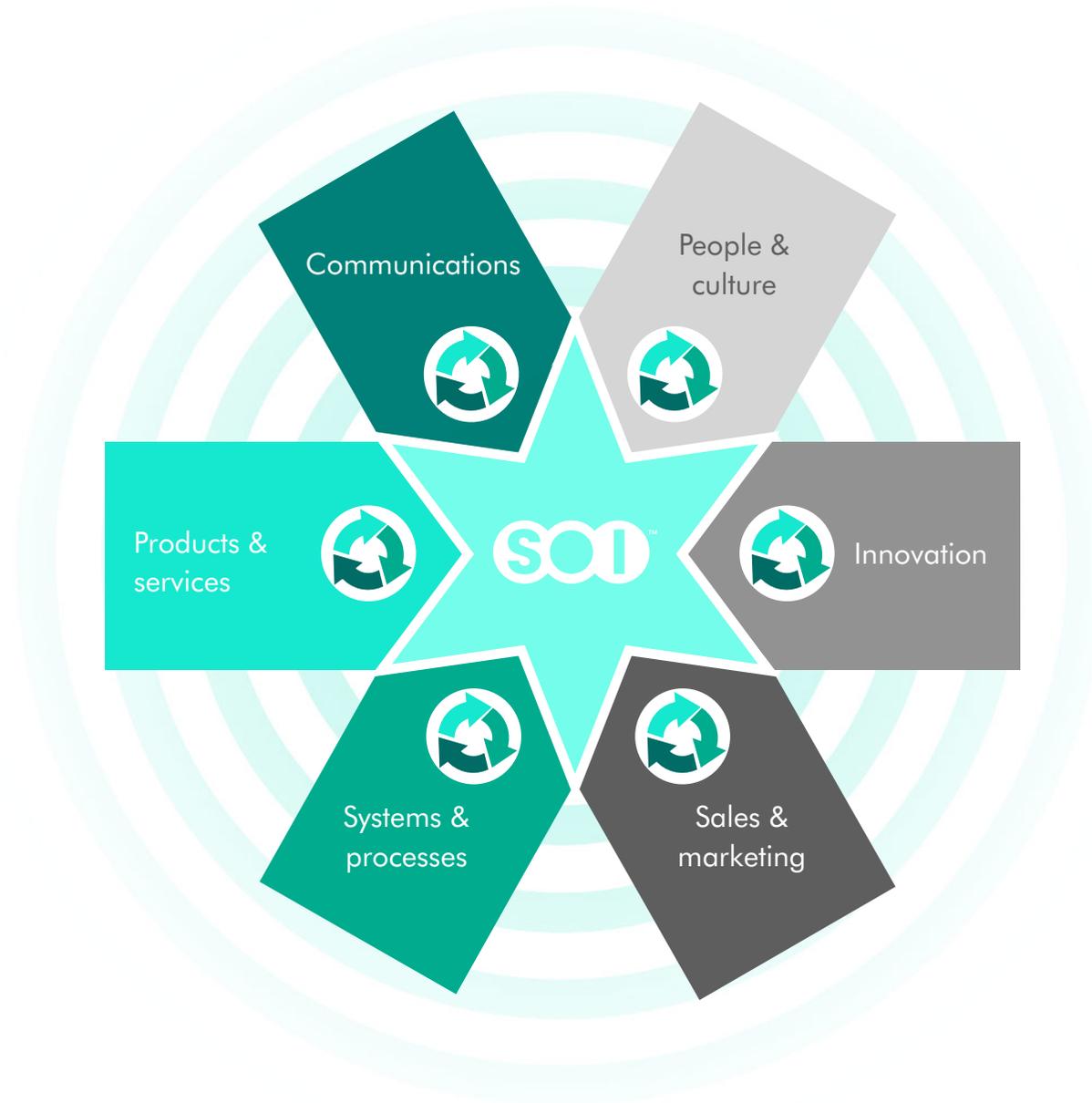
2.8 To what extent do you have the relationships and connections you need to contribute to the SOI?

2.9 Does the business help build an ecosystem of collaboration with external stakeholders?

You will want to probe for other factors that drive impact and you can do this through periodic in-depth assessments; but remember, micro-surveys are focused, short, frequent and quick.

## Keeping it real

The regular drumbeat of SOI communications, micro-surveys and well-publicised alignment actions will ensure that your SOI is authentic and impactful. Annual surveys are for show. Frequent, touch-point based surveys will drive real action and outcomes across your business.



## 5.4 EXTERNAL LEARNING LOOPS

The exact same guidelines for operating an internal learning loop apply to learning loops that engage your external stakeholders. However, the propositions and questions are different.

### 1.0 Performance metrics

(Likert scale 0 = not at all, 10 = very much)

Your long list of propositions exploring performance from your internal staff learning loop can be shortened and simplified for external stakeholders.

1.1 [Your business name] has a positioning statement that clearly explains the benefits of the SOI.

1.2 [your business name] has a sustainable core strategic objective (SOI) that drives the company.

1.3 [your business name] has clearly defined values that underpin the SOI.

1.4 My experience of [your business name] includes its SOI.

1.5 [your business name] is helping to change status quo thinking in its industry sector.

1.6 [your business name] staff talk with me about the SOI.

1.7 [your business name] invite me to engage in its public good objectives.

1.8 [your business name] achieves the levels of third-party advocacy required to support its objectives.

1.9 [your business name] delivers products and services across the board that are fit for a sustainable future.

### 2.0 Impact metrics

The internal impact-focused questions of two types – perceived change and relationship quality – give us more than we need for external stakeholders, so the task here is to again simplify. Pairing open questions seeking examples with closed Likert scale questions provides gold dust.

#### Perceived change

(Open questions)

2.1 What positive changes do you see as a result of [your business name]'s SOI?

2.2 What unintended and/or negative changes do you see as a result of your SOI?

#### Quality of relationships

(Likert scale 0 = not at all, 10 = very much)

2.3 How much does the SOI try to address what is important to you?

2.4 Is it worth your effort to engage on the SOI to make it more effective?

2.5 Can you hold leaders accountable for your SOI?

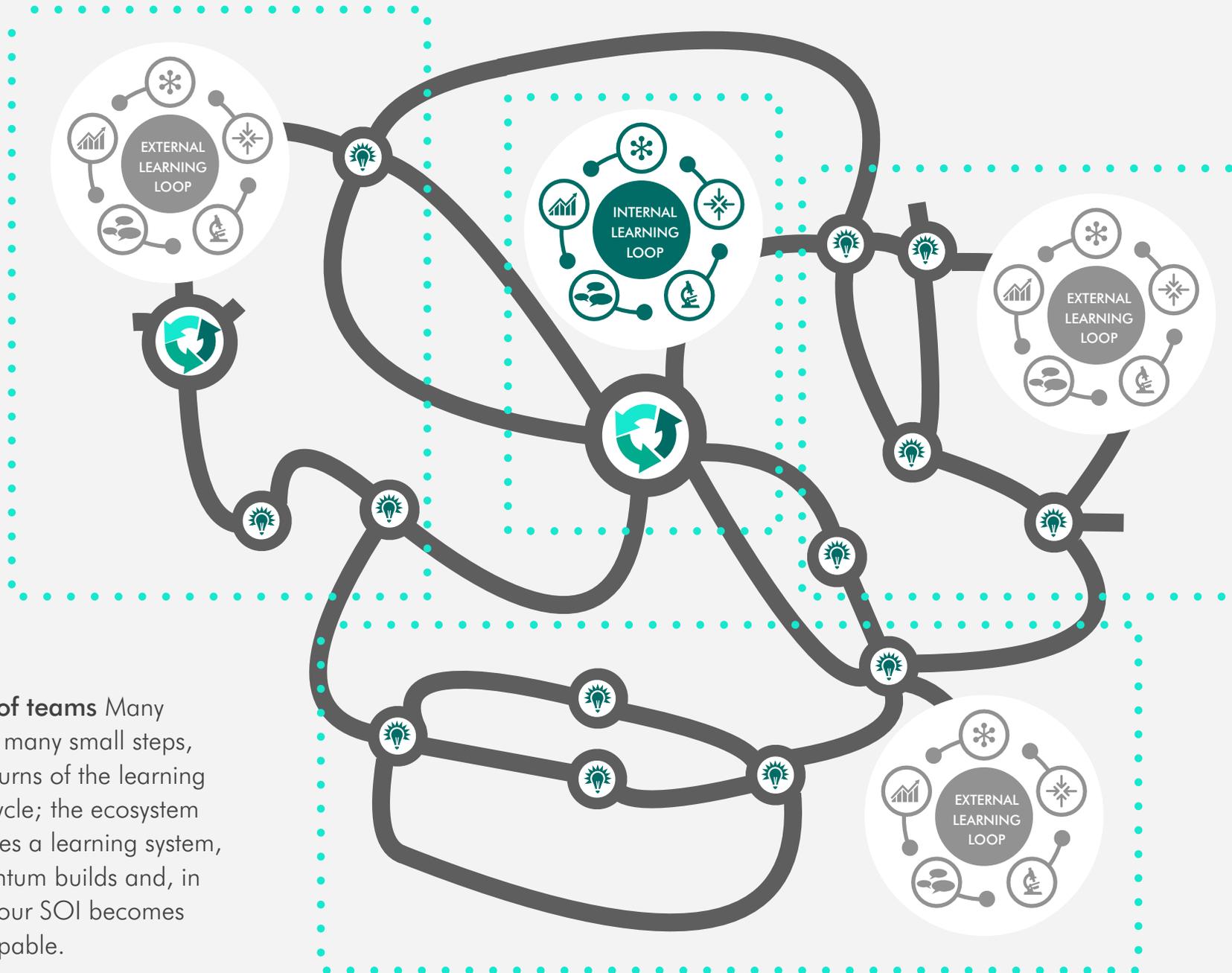
2.6 Do leaders at [Your business name] act on the feedback about the SOI that you and others give them?

2.7 Do you feel safe advancing your business's contributions to society at the expense of short-term profits?

2.8 Do you feel encouraged and supported to adapt SOI plans and activities based on new evidence and learning?

2.9 To what extent do you have the relationships and connections you need to contribute to the SOI?

2.10 To what extent does [Your business name] help build an ecosystem of collaboration with you and other stakeholders?



**Team of teams** Many teams, many small steps, many turns of the learning loop cycle; the ecosystem becomes a learning system, momentum builds and, in time, your SOI becomes unstoppable.

## 5.5 LEARNING TO THRIVE

Having credible data to prove the value of your SOI has never mattered more. In a world rightly sceptical of businesses that talk purpose but don't live it, demonstrating real impact is critical.

SOI Learning Loops allow you to back up your intent with evidence. Take the 'Feel-good' example from the Define chapter. That business could confidently report:

- 72% of customers cite specific ways it helps them "feel good"
- Staff once worried about purpose versus profit now feel protected from pressure to act against the SOI

Progress like that doesn't come from top-down strategy alone. It's the result of a shared learning system that continuously engages the people who make your business work.

### Ecosystem thinking

Once SOI Learning Loops are active, a bigger picture comes into view: you're not operating alone. Your business is part of an interdependent ecosystem.

Your SOI was created to benefit your organisation, its stakeholders, and society. That's why your Learning Loops make the ecosystem — not just the business — the true unit of action and analysis. And by participating in these loops, your stakeholders contribute to the greater good.

### Simplicity over complexity

The problems your SOI tackles may be complex, but your measurement process doesn't need to be. Instead of chasing hard-to-quantify outcomes, focus on small, simple signals. These are easier to act on, and over time, they drive meaningful improvement and alignment.

### Building momentum

Simplicity is what fuels momentum. Only a light-touch process can move fast enough to create a rhythm — a drumbeat your team and stakeholders can follow.

There's no fixed number of surveys or perfect cadence. What matters is balance: don't ask for feedback you can't act on. Failing to follow through erodes trust quickly.

With practice, you'll find your own rhythm — a sustainable cycle of insight, action, and alignment. And as that rhythm builds, so does belief. Confidence grows, credibility builds, and purpose becomes performance.

### The Final Piece

Measurement completes the puzzle. Your SOI Learning Loops are the final step in pivoting your business to be fit for a future that delivers benefit for all.

## KEY POINTS



Measuring your SOI together with your stakeholders makes living proof that your SOI is authentic for them. It lets them know that they are the ones who get to say whether your SOI is making an impact.



You measure to improve and get better at contributing for the good of all. Your learning loop system generates actions to improve. Stakeholders decide whether implemented changes are steps in the right direction.



Your most important performance indicator is alignment. If your staff are responding to surveys saying that they are experiencing pressures to work in ways that are not consistent with your SOI, you can be sure there is important work to do with senior management.



You gain momentum behind your SOI through frequent cycles of stakeholder engagement that clearly demonstrate you are making progress in transforming your company.



Learning loops hardwire you into the ecosystem around your business so that you avoid the trap of just ticking CSR and ESG boxes.

CHAPTER 6:

# APPENDIX

- 
- 6.1 Glossary
  - 6.2 Bibliography
  - 6.3 Acknowledgements
  - 6.4 About the author



SINGLE ORGANIZING IDEA

# 6.1 GLOSSARY

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## **Accountability**

A term encompassing the evolving ways that companies are held to account by stakeholders. Today accountability norms go far beyond financial accounting standards and include stakeholder views on a company's effects on people and planet.

## **Circular Ecosystem/Circular Solutions**

The circular concept redefines growth, re-focusing the definition of success on decoupling economic activity from the consumption of finite resources, and designing waste out of the system. It values economic, natural, and social capital, and is associated often with renewable energy sources.

## **Corporate Social Responsibility (CSR)**

A general term covering the very broad spectrum of ways that businesses address their social and environmental responsibilities that range from tokenism and cosmetic to effective and fully integrated.

## **Customer Relationship Management (CRM)**

Systematic practices and tools to manage interactions with customers and potential customers. A CRM system helps organisations manage customer relationships and streamline business processes to increase sales, improve customer service, increase profitability, and benefit society.

## **Ecosystem**

James F. Moore introduced ecosystem the concept and defined it thus: "An economic community supported by a foundation of interacting organisations and individuals – the organisms of the business world. The economic community produces goods and services of value to customers, who are themselves members of the ecosystem. The member organisms also include suppliers, lead producers, competitors, and other stakeholders. Over time, they coevolve their capabilities and roles, and tend to align themselves with the directions set by one or more central

companies. Those companies holding leadership roles may change over time, but the function of ecosystem leader is valued by the community because it enables members to move toward shared visions to align their investments, and to find mutually supportive roles."

## **Enterprise Risk Management (ERM)**

A plan-based business strategy that aims to identify, assess and prepare for any dangers, hazards, and other potentials for disaster — both physical and figurative – that may interfere with an organisation's operations and objectives.

## **Environmental, Social, and Governance (ESG)**

A set of concerns about company operations that investors use to evaluate potential investments. While once confined to socially conscious investors, ESG has become a mainstream norm. Diversity, equity and inclusion (DEI) considerations are now also entering investor assessments.

## **Index of Industrial Production (IIP)**

A monthly economic indicator measuring real output in manufacturing, mining, electric and gas industries, relative to a base year.

## **International Organisation for Standardisation (ISO)**

An independent, non-governmental, international organisation that develops standards to ensure the quality, safety and efficiency of products, services and systems.

## **Kaizen**

A Japanese business philosophy of continuous improvement. It prescribes improvement processes that involve all employees. Kaizen sees improvement in productivity as a gradual and methodical process.

## **Key Performance Indicators (KPIs)**

Indicators used to monitor progress towards intended results. KPIs are utilised to keep focus on operational and strategic improvement.

### **Networked (or flat) Business Model**

A business with a flat management structure is layered in order to better integrate siloed internal resources, maximise collaboration and promote self-realisation, shared purpose, knowledge and information.

### **Purpose Washing**

Like the term ‘greenwashing’, purpose washing is where brands and companies claim commitment to a specific cause without adopting this into their work or actions.

### **Silos**

A function or part of a company that does not communicate or collaborate well with other parts of the company.

### **Small and Medium-sized Enterprises (SMEs)**

A SME is generally a small or medium-sized enterprise with fewer than 250 employees. The EU also defines an SME as a business with fewer than 250 employees, a turnover of less than €50 million, or a balance sheet total of less than €43 million.

### **Societal Impact Analysis**

The processes of analysing, monitoring and managing the intended and unintended social consequences, both positive and negative, of planned interventions (policies, programs, plans, projects) and any social change processes invoked by those interventions. Its primary purpose is to bring about a more sustainable and equitable biophysical and human environment.

### **Sustainable Development Goals (SDGs)**

The Sustainable Development Goals (SDGs), also known as the Global Goals, were adopted by all United Nations Member States in 2015 as a universal call to action to end poverty, protect the planet, and ensure that all people enjoy peace and prosperity by 2030.

### **Sustainable Prosperity**

The concept of equitable, long-term economic activity that meets the needs of the population fairly, and without the unviable use of natural resources.

### **Touchpoint**

A point of contact or interaction between a business and its external stakeholders, especially customers. Sometimes referred to as a ‘moment of truth’.

### **Traditional Business Model**

Traditional businesses have a top-down chain of command with a sole leader at the top and subordinates at various levels below them. The hierarchical organisation is designed to maximise profits for owners.

### **Triangulate**

Interpreting and validating data by comparing it to other sources explaining the same phenomenon.

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## 6.3 ACKNOWLEDGEMENTS

The CORE Playbook is the result of generosity, insight and collaboration — built over many years and across many borders.

Following the publication of my first book, *CORE: How a Single Organizing Idea Can Change Business for Good*, I set out on a self-funded (and carbon-offset) global book tour. What began as a way to spark conversation quickly evolved into something much more valuable. Through the *CORE Dinner Debate Series* — 17 roundtable events held in cities around the world — I brought together business leaders, academics, sustainability experts, human rights advocates, policymakers, and change-makers from both governmental and non-governmental sectors.

I'm deeply grateful to everyone who took part in those debates. While I can't name every individual, I want to sincerely thank the organisations they represented and the thinking they contributed. Those evenings offered rich and sometimes challenging conversations — but they also affirmed something I've long believed: that while protest and evidence matter, they're not enough on their own. To create real change, people need practical tools. That insight became

the catalyst for the original Playbook and this digital version.

This book has also been shaped by the experiences I've had working alongside associates and clients across more than 40 countries. Their openness, ambition, and courage to reimagine the role of business have inspired me at every stage. I owe a particular debt of thanks to the Associates I've partnered with — whose professionalism, integrity and shared commitment to purpose continue to elevate and expand this work.

To everyone who has contributed — whether through conversation, collaboration, or co-creation — thank you.

### The CORE Dinner Debate Series participants

**Business:** Arla Foods International, Aviva, Bank of New Zealand, Banque Libano-Française, Blackrock, Blom Bank, Cedenco Foods, Centrica, Community Clothing, Coop Danmark, Decathlon Canada, Dell, Dig Inn, Douglas Pharmaceuticals, Fonterra, Fiera Capital, FransaBank, Gaz Métro (Canada), Hawkins, HP, IBM (Blockchain), Inter Ikea Group, IPSOS MORI, Kordia, KPMG, Leon, Lyft, Maersk, Marks & Spencers, MasterCard, Nordic Impact, Novo Nordisk, NTD

Apparel, Ørsted, Portland Trust, Pearson, Ripple, Société Générale, SourceTrace, Sumitomo, Unilever, Visa, Walmart

**Academia:** American University of Beirut, Cambridge University (CISL), Copenhagen Business School, Cranfield Business School, John Hopkins, Metropolitan University, London Saïd Business School, Oxford, Harvard (Shared Value Initiative), Questrom School of Business - Boston University,

**NGOs:** ABET, Ashoka, B Corps (UK), Business Fights Poverty, CARE, Circular Norway, Clinton Foundation, Conference Board of Canada, DAI, Danish Institute for Human Rights, DEVEX, Ethical Trading Initiative, Forum for the Future, InterAction, InterAmerican Development Bank, International Rescue Committee, Investment Fund for Developing Countries, Global Communities, Global Partnership for Sustainable Development Data, Nesta, Oxfam, Save the Children, Sustainable Brands, Sustainatopia, The Sustainability Curriculum Consortium, The World Bank, UNDP, UN New York, UN Global Compact (Lebanon), US Chamber of Commerce Foundation, US Green Building Council, Vital Voices, World Cocoa Foundation, WWF,

**Government:** New Zealand Trade & Enterprise, Ministry of Foreign Affairs of Denmark.

## 6.4 ABOUT THE AUTHOR

Neil Gaught is a strategic advisor, speaker and writer best known for conceiving the Single Organizing Idea (SOI®) — a pioneering methodology that helps businesses align purpose with performance to drive meaningful, measurable outcomes.

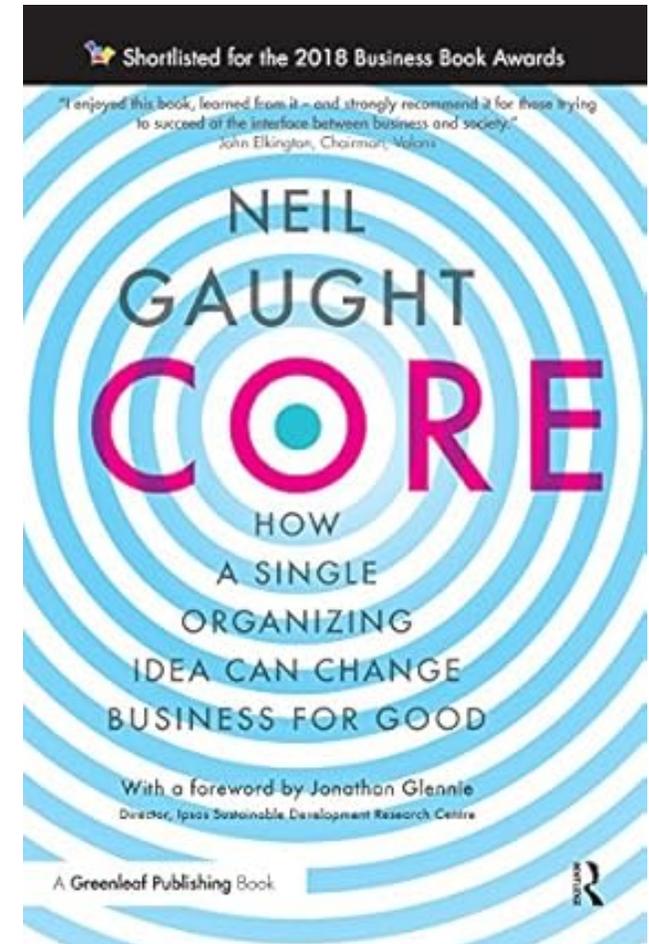
Over the past 25 years, Neil has worked with leading organisations across the world, from multinationals to SMEs and from mission-driven NGOs to start-ups, guiding them to rethink how they create value for both society and shareholders. His practical, principle-based approach has made him a trusted voice in the global movement for business as a force for good.

Neil's first book, *CORE: How a Single Organizing Idea Can Change Business for Good*, published in 2018, was shortlisted for the UK Business Book of the Year and quickly recognised as a breakthrough contribution to the purpose conversation. In 2020, he followed it with *CORE: The Playbook* — a hands-on guide to implementing the SOI methodology. This

updated edition builds on that foundation, responding to the seismic changes in geopolitics, society and technology that have reshaped the business landscape in recent years.

A passionate advocate for design thinking and collaboration, Neil has helped organisations on every continent and remains closely involved in shaping the future of purpose-led strategy. He is also the founder of NG&A, an independent strategy practice and leads a growing international network of Associates committed to making purpose possible.

Now based in New Zealand — a country that shares many of the values at the heart of his work — Neil continues to support leaders and teams who are ready to make a difference and do business better.



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