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DEVELOPING MISSION STATEMENTS WHICH WORK

by

Mark C. Baetz and Christopher K. Bart

Innovation Research Working Group
WORKING PAPER NO. 58

November, 1996

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Reprinted from *Long Range Planning*, Vol. 29, No. 4, pp. 526-533, 1996

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Developing Mission Statements Which Work

Mark C. Baetz and Christopher K. Bart

MISSION STATEMENTS HAVE become popular in recent years,¹ but research suggests that these statements vary enormously in length and content, which suggests that there is little agreement about what a mission statement should contain.² Also, mission statements are being used for a wide variety of purposes, potentially leading to "some confusion" as to what is the statement's primary purpose.¹ Some of the various purposes identified previously include external public relations,¹ to motivate staff within the company,¹ as a strategic tool to define the firm's commercial rationale and target market,³ to ensure unanimity of purpose within the organization,⁴ to provide a basis for allocating organizational resources,⁴ to establish a general tone or organizational climate,⁴ to facilitate the translation of objectives into a work structure involving the assignment of tasks to responsible elements within the organization,⁴ to specify organizational purposes and the translation of these purposes into objectives in such a way that cost, time and performance parameters can be assessed and controlled,⁴ to provide a consistent purpose between different interest groups connected to the organization,² and to improve understanding and support from key groups outside the organization.² To add to the possible confusion created by such diversity of purposes for a mission statement, is the fact that companies with mission statements have also been found to have a range of other statements.⁵

We developed the present study to determine the latest practitioner thinking about the role of mission statements and the process for creating such a statement. Specifically, we decided to investigate: 1. how prevalent mission statements have become, 2. why they are used or not used, 3. what is contained in the typical mission statement, 4. levels of managerial satisfaction with the statement itself compared to the process for creating it and 5. who is involved in cre-

A mission statement is potentially an invaluable tool for formulating and implementing an organization's strategy. This article reports on a survey of large Canadian firms to determine the prevalence of mission statements and how they are created and used. Most large firms had a mission statement, the top management group was most involved in its creation, it was used for a variety of purposes, and the majority of firms were satisfied with the statement and the process they had used to create it. Copyright © Elsevier Science Ltd

ating such a statement. We also decided to focus the study on corporations in Canada. Previous mission statement surveys have been conducted in other countries (e.g. the USA, UK and New Zealand) but no similar study has been conducted in Canada, and it was felt a Canadian perspective would be of interest in the ongoing debate about the role and nature of mission statements.

Research Method

A questionnaire was mailed to the 1992 *Financial Post* 500 companies which are 500 of the largest industrial firms in Canada. The covering letter was personally directed to the CEO of each organization. The rationale for the survey was described in the covering letter.

Respondents were asked to use five-point Likert-type scales to indicate degree of satisfaction, level of involvement, degree of importance or frequency of use (5="very satisfied" or "to a great extent" or "very important" or "always considered"). Since very



senior executives were responding to the questionnaire, only single item questions were posed in order to keep the questionnaire as brief as possible (this represented the principal recommendation from the CEOs involved in pre-testing the questionnaire). Moreover, few of the qualitative questions raised in this study have ever been asked in previous research. Thus, our initial attempts here should be considered as somewhat exploratory in nature.

We asked respondents to indicate whether or not they had a mission statement. As in previous studies on mission statements⁵ we acknowledged in our questionnaire that a mission statement may have different titles, i.e. credo, statement of purpose, principles, values and/or beliefs. In cases where multiple statements were sent but none titled 'mission', we decided to use just the first or 'lead' statement for purposes of content analysis.

Four of the surveys were returned because of incorrect addresses, and 12 were returned indicating the organization declined to participate. Eight of the 12 organizations provided various reasons for not participating as follows: 1. "the company's subsidiaries or operating companies were in a better position to complete the questionnaire"; 2. "it was premature because the company was just in the process of creating a mission statement"; 3. "surveys of this type taking a few minutes to complete are too subjective"; 4. "there is not enough time to respond to the many requests of this type"; 5. "answers to many of the questions would reveal confidential information for this privately held company in a very competitive market".

A total of 135 organizations completed the questionnaire. A majority of the individuals (65%) completing the questionnaire were clearly in the top management group (as seen in Table 1). In fact, 38% of the questionnaires were completed by the CEO personally, with the remaining questionnaires completed by individuals specifically designated by the CEO as being most capable of answering our questions. An analysis comparing the responses of the CEO and non-CEO groups revealed no significant differences between them. A summary of key operating

and performance statistics of the respondent firms is reported in Table 2. There appeared to be no industry bias.

Results and Discussion

Prevalence of Mission-type Statements

Of the 135 organizations responding, 116 (or 86%) indicated that they had a mission statement. Another five indicated that they were in the process of developing such a statement. Overall then, 90% either had or were creating a mission statement—a far higher percentage than in previous large-scale surveys. For example, in David's survey of the *Business Week* 1000, 41% indicated they had a mission statement,⁵ and in Pearce and David's survey of the *USA Fortune* 500, 60% indicated they had a mission statement.⁶ In Byars and Neil's 1987 survey of 208 organizations, 68% indicated they had a mission statement.⁷

The results in our study are similar to smaller-scale surveys. For example, in the survey by Hooley *et al.* of 80 of the largest organizations in New Zealand (the 50 largest companies, the 7 universities, the 8 largest polytechnics, the largest government departments and ministries and the 5 largest primary produce marketing boards), 91% overall had a mission statement (85% of the companies).²

We asked respondent organizations to send a copy of their firm's mission statement. Of the 93 organizations complying, 42 (45%) supplied more than one statement (20 of the 42 supplied from four to six types of statements). Other than 'mission statement' the most commonly-used titles were Vision, Values, Beliefs, Principles and Strategic Intent/Direction.

As in a previous study,¹ we found that the mission statements supplied were a relatively recent phenomenon: 32% had been developed within the previous three years, and 70% had been developed within the previous seven years. We believe that this observation explains the higher percentage use of mission statements in our study, i.e. mission statements have become more fashionable in recent years.⁸

TABLE 1. Respondents

	Number	Percentage	Cumulative percentage
Chairman/President/CEO/GM	51	38	38
Vice President	37	27	65
Director/Manager	39	29	94
Assistant VP/Corporate Secretary	2	1	95
Staff/Admin Assistant/Contract Administrator	5	4	99
Consultant	1	1	100
Total	135	100%	

TABLE 2. Responding company's statistics C\$ million

	Mean	Median	Maximum	Minimum
Sales	1194	474	14,475	114
Profits	-11	4	329	-1005
Assets	1528	429	13,192	33
Return on sales (%)	0.5%	0.9%	17.9%	-65.2%
Return on assets	1.8%	1.8%	59.2%	-16.8%
Sales rank	n/a	# 167/500	# 2/500	# 357/500
Annual sales change (%) 1992-1993	1.9%	3.0%	31.0%	-57.0%
Annual profit change (%) 1992-1993	-72.5%	-1.0%	1216.0%	-2253.0%
Sales from new products/new services (%)	37.4%	20.0%	100.0%	2.0%

The Content of a Mission Statement

A number of researchers have analysed the content of mission statements using various approaches. For example, David analysed mission statement content with reference to the following pre-determined nine components: 1. customers, 2. products or services, 3. location, 4. technology, 5. concern for survival, 6. philosophy, 7. self-concept, 8. concern for public image and 9. concern for employees.⁵ Klemm *et al.*, based on their own experience, used a four-category typology "to discover how companies classified their own statements and how mission statements differed from other types of statements about goals and objectives". The categories in the typology were: 1. the mission, 2. strategic objectives, 3. quantified planning targets and 4. the business definition.¹

We decided to use the opposite approach of no preconceived notions. After reviewing the mission statements received in this study, we developed a number of categories for analysing the statements using a 'grounded theory' approach, i.e. our categories are based on what data was provided and not on what data we hypothesized we would collect. The categories we developed are presented in Table 3.

Our analysis showed that the typical mission statement contained: essentially only one financial objective (e.g. to enhance profitability and long-term value), or none at all; one or two non-financial objectives (e.g. to provide challenging work environment); one value/belief/philosophy statement (e.g. to be a responsible company); the organization's definition of success (e.g. meet or exceed customer's expectations); the organization's number one priority; a definition of the organization's strategy (i.e. a definition of specific products, specific markets and two bases for competing) and reference to one stakeholder (typically the customer). Thus, while used as general statements of purpose or intention, mission statements among Canadian corporations appear to address many issues.

Why Most Canadian Firms Have Mission Statements

Respondents to our survey were asked to choose from a list of possible uses for their organization's mission

statement. Our list was compiled from the various previous studies undertaken.⁵ Naturally, respondents were also free to mention any other uses for their mission statements that were not included in our list.

Our results (see Table 4) showed that mission statements were being used for many of the reasons listed—though some reasons were somewhat more important than others. The five rationales achieving the highest average scores in terms of frequency were:

- to guide the strategic planning system;
- to define the organization's scope of business operations/activities;
- to provide a common purpose/direction transcending individual and department needs;
- to promote a sense of shared expectations among all levels of employees, thereby building a strong corporate culture (i.e. shared values);
- to guide leadership styles.

These results are interesting because they confirm one of the principal rationales for having mission statements which has been cited previously in the literature, namely that mission statements are important for 'providing' a common purpose/direction transcending individual and departmental needs.⁹

In addition, the practitioners' responses indicate that the least important uses of a mission statement were:

- to guide recruitment/selection procedures;
- to refocus the organization during a crisis;
- to guide job descriptions/job design;
- to guide types of rewards;
- to provide a basis for allocating resources.

It is surprising that providing a basis for allocating resources was seen as the least important use given that one of the principal arguments given in favour of mission statements in the literature is to guide the allocation of resources.^{4,10-12} It is also interesting to note that a mission statement is not particularly useful when the organization is in a crisis. Perhaps that is because the need for change or the change in

TABLE 3. Content of mission statements (total 135)

Components	Percentages
1. Financial objectives	None—46 One—46 Two—8
2. Non-financial objectives	None—8 One—34 Two—34 Three—15 Four—6 Five—2 Six—1 Seven—1
3. Values, beliefs, philosophies	None—29 One—49 Two—13.5 Three—4.5 Four—1 Five—1 Six—1
4. Definition of success	Not included—35 Included—65
5. Number one priority	Not included—4.5 Included—95.5
6. Specific product definition	Not included—25 Included—75
7. Specific market definition	Not included—33 Included—67
8. Basis of competition	None—11 One—30 Two—31.5 Three—19 Four—8
9. Number of stakeholders mentioned	None—10 One—39 Two—15 Three—24 Four—6 Five—3 Six—1 Stakeholders in general—1
10. Stakeholders identified	Times mentioned
Customer/client	66
Employees	41
Shareholder	34
Community/society/general public	16
Associated business	9
Managers	3
Government	2
Peers	1
Corporate family	1

direction is obvious. In any case, it would be interesting to learn more about the role of mission statements in firms undergoing change. This research has found that the statement is frequently used to promote a sense of shared expectations among employees and as a result the statement might also be used to reframe employee expectations during periods of change, possibly resulting in a new mission statement. Overall, it seems mission statements relate more to the for-

mulation of the organization's strategy rather than strategy implementation. This may explain why there is sometimes dissatisfaction and disillusion with mission statements, i.e. companies are only going half-way with them and not following through on the details of implementation.

Why Mission Statements Are Not Used

In separate studies by both David⁵ and Klemm *et al.*¹ the researchers claimed that the main reason for not having a mission statement was that it can create controversy in terms of answering the question "What is our business?" Apparently, settling this question can reveal differences among senior managers that are difficult to resolve. Other reasons offered by these researchers included: 1. tactical and operational matters drive out long-term strategic considerations and 2. there is a practical skepticism about the value of mission statements.

Ireland and Hitt¹¹ have also reported other factors accounting for the failure to develop mission statements. These include: 1. the number and diversity of organizational stakeholders; 2. the amount of work required to develop an effective statement; 3. the tendency for some stakeholders to become comfortable with a firm's current position; 4. the belief that mission statements may reveal too much confidential information; 5. the difficulty that can be encountered when key upper-level personnel spend too much time on operational rather than strategic issues; 6. the requirement to think as a 'generalist', not as a specialist, when developing a mission statement; 7. some individuals' desire for excessive amounts of organizational autonomy; 8. the historical formality of strategic planning processes.

The findings from this study confirm many of these previous results. However, due to the low 'no mission statement' response rate, it is difficult to assess the 'main' reasons for those firms having no mission statement. In our study, 14 of the 135 organizations (or 10%) indicated that they currently had no mission statement and were not in the process of developing such a statement. A total of 18 reasons were provided (see Table 5). No frequency is given due to the small number of firms involved. However, reasons 1–5 represent the rationales given most often. It is interesting that some of these reasons fit with the conclusions of others, particularly, the practical skepticism about their value (i.e. "would only be used for public relations").⁸ Furthermore, the difficulty of creating consensus with unrelated organizations and the concern about "taking too much time to formulate and implement" suggests that operational matters are taking precedence.

Satisfaction with the Mission Statement

A firm's satisfaction with its mission statement is an area/issue which has not been previously

TABLE 4. Uses of the mission statement (in order of frequency used)

'To guide or promote'	Cumulative weight (frequency × point on scale)	Weight (%)
1. Strategic planning	394	7.3
2. Scope of business operations	390	7.2
3. A common purpose	385	7.0
4. A sense of shared expectations	379	7.0
5. Leadership styles	366	6.7
6. The interests of stakeholders	348	6.4
7. Employee motivation	347	6.4
8. Training and development	346	6.4
9. Organizational structure	345	6.4
10. Performance evaluation	320	5.9
11. Budgeting system	318	5.9
12. Recruitment/selection	310	5.7
13. Refocusing the organization during a crisis	303	5.6
14. Job descriptions/job design	302	5.6
15. Types of rewards	289	5.3
16. Allocation of resources	285	5.3

TABLE 5. Why we don't have one—reasons for not having a mission statement (ranked in order of frequency)

1. A public relations exercise
2. Too much time/effort to formulate
3. Too much time/effort to implement
4. Unrelated businesses too difficult to formulate
5. Entrepreneurial—no common vision/values
6. Banal and obvious
7. Lack knowledge/expertise
8. Process abandoned/failed
9. No need to change the status quo
10. Not enough time
11. A waste of time
12. Uncertain about its value
13. Statement made meaningless by changes in ownership
14. Company is restructuring
15. A subsidiary company—no statement needed
16. Developed long-range strategy instead
17. Other priorities
18. Unable to develop a statement to satisfy stakeholders

investigated in the literature. We asked respondents to answer this question directly and found that 68% were apparently satisfied with their firm's current mission statement. What is most disheartening, however, is the observation that 32% were not satisfied. Several reasons for the dissatisfaction were given by the respondents (see Table 6). Of note, it was our opinion that most of these problems appeared to be easily fixable.

The Process of Creating the Mission Statement

There is a body of theory known as stakeholder theory which extols the virtues of participation and involvement by many different groups in the affairs of a firm.

Various authors have supported the stakeholder approach to strategic management in different ways. For example, Baetz and Beamish¹³ noted the following:

Managers are increasingly expected to consider a growing number of stakeholders when formulating strategy. A stakeholder is an individual or a group with a 'stake' in the business. Each stakeholder depends on the business in order to realize goals, while the business depends on each stakeholder for something each provides the business. Management is most likely to satisfy critical stakeholders if it takes their preferences into account when formulating the strategy.

Carroll¹⁴ provided a somewhat different rationale for the stakeholder approach by noting the following:

The business organization is the institutional centrepiece of a complex society. In a society conscious of an always-improving lifestyle, with more groups every day laying claims to their piece of the good life, business organizations today need to be responsive to individuals and groups that they once viewed as powerless and unable to make such claims on them. We call these individuals and groups stakeholders.

Business organizations must address stakeholders if they want to be profitable in the long run. Business must also address stakeholders because it is the ethical course of action to pursue. Stakeholders have claims, rights and expectations that should be honoured, and the stakeholder approach assists in that pursuit.

Overall, a key premise of stakeholder theory is that the level of participation by different stakeholders in a firm's affairs affects both the economic and social performance of the firm.

When considering the relationship of stakeholder theory and mission statement development, several writers contend that the involvement of select stakeholders in developing a mission statement is not only routine, but required.¹⁵⁻¹⁷ In our investigation we found that the top management group was the one most involved in creating the mission statement (see

TABLE 6. Factors decreasing satisfaction

	Times mentioned	% mentions
1. Out of date, incomplete, doesn't reflect underlying values	16	41.0
2. Too complicated, too long, ambiguous	10	66.7
3. Uninspiring/not passionate	2	71.8
4. Untested/takes time to implement	2	76.9
5. Not utilized/more work to make part of fabric	2	82.0
6. Too simple	1	84.6
7. Not future-oriented	1	87.2
8. Not well accepted	1	89.7
9. Redundant given restructuring	1	92.3
10. Not published	1	94.9
11. Statement developed by middle level managers changed by top management	1	97.4
12. Not followed (i.e. company returned to short-term, reactive management style)	1	100.0
Total	39	

Table 7). The CEO was viewed as the second most involved. Beyond these two categories, there was a noticeable drop in the rates of participation.

Clearly, despite the preaching of stakeholder theory advocates, creating mission statements is viewed as a senior manager privilege/prerogative. What is most interesting, however, is the finding that consultants appeared to figure prominently in the process (9.7% of the time)—more than shareholders, non-manager employees or even customers. Another surprising finding is that the participation of the customer in creating the mission statement is so low. This appears to contradict two other findings: 1. that respondents in our sample considered that one of the more important uses of a mission statement (6th out of 16—see Table 4) is to ensure that the interests of key external stakeholders (e.g. government, customers, suppliers etc.) are not ignored; 2. that the customer is clearly the most frequently mentioned stakeholder in our sample of the 93 mission statements supplied by the respondents. It may be that companies realize that the customer is important and as a result, use the process

for developing a mission statement to 'confirm' this critical point for internal stakeholders.

Satisfaction with the Mission Statement Process

The question of whether or not managers are satisfied with the process used to create the mission statement has not been previously investigated. We asked this question directly in our survey because as found previously,² the process can be even more important than the statement itself. In fact, one study in New Zealand² found that 24% of respondents considered the process for creating the mission statement more important than the message, and another 34% considered the process and message to be of equal importance.

Of our respondents, 73% claimed to be clearly satisfied with the process used for developing their organization's mission statement. This is slightly higher than the satisfaction scores for the mission statement itself. It seems possible therefore for firms to not have a 'good' mission statement, but still consider the process for developing the statement useful.

Several factors affecting satisfaction levels were offered by the respondents (in an open-ended question—see Table 8). However, there appears to be, in reality, only one factor dominating the level of managerial satisfaction with the mission development process, namely the extent of involvement of various stakeholders (employees, customers, consultants etc.). In other words, satisfaction is increased when a variety of stakeholders provide input to the statement and satisfaction is decreased when key stakeholders are excluded.

In considering the issue of the importance of the process, respondents in our survey considered the process of developing the mission statement to be quite important, i.e. 15% considered the process *more*

TABLE 7. Who is involved

Those involved	Number of times checked	Percentage
Top management group	112	32.8
CEO	102	29.9
Middle managers	42	12.3
Consultant(s)	33	9.7
Shareholders	21	6.2
Non-managers	19	5.6
Customers	8	2.3
Suppliers	3	0.9
Other external stakeholders	1	0.2
Total	341	99.9

TABLE 8. Satisfaction with the process

	Times mentioned	Percentage
<i>I Factors increasing satisfaction</i>		
1. Wide range of input from everyone, e.g. employees at all levels, customers, consultants	16	48.5
2. Senior management team involved leading to ownership of and commitment to mission statement	7	21.2
3. Brought organization together/team building/improved understanding of company direction	4	12.1
4. True soul-searching/brain-storming/debate and consensus-building	3	9.0
5. Quick	1	3.0
6. Unanimous agreement	1	3.0
7. Led to introduction of breakthrough process	1	3.0
Total	33	99.8
<i>II Factors decreasing satisfaction</i>		
1. Too isolated process/not enough feedback/discussion/involvement/input from key stakeholders, e.g. employees, customers, board of directors	17	70.8
2. Not enough discussion re. purpose and use	1	4.2
3. Did not create emotional attachment	1	4.2
4. Resulted in compromise	1	4.2
5. Did not change behaviour enough	1	4.2
6. Too much energy spent on words, not on plans	1	4.2
7. Difficult to build sense of ownership	1	4.2
8. Needed a mission statement for a higher level	1	4.2
Total	24	100.2

important than the message and a majority (55%) of respondents considered the process and message of the statement equally important.

Summary and Recommendations

This study has attempted to shed additional light on the use of mission statements in general and by Canadian firms in particular. The major findings of this study are as follows:

- ❑ Unlike the results of earlier large scale studies in other countries, this study found that nearly all larger organizations in Canada have decided to create a mission statement. The trend seems to be towards increasing and continued use of mission statements.
- ❑ The 'typical' statement contains essentially only one financial objective (or none at all), one or two non-financial objectives, one value/belief/philosophy statement, the organization's definition of success, the organization's number one priority, a definition of the organization's strategy (i.e. a definition of specific products, specific markets and two bases for competing) and reference to one stakeholder (typically the customer).
- ❑ There are several possible purposes for a mission statement, and the majority of organizations creating statements appear to be satisfied with both their statement and the process of creating it. The

majority of respondents considered the process and message of the statement of equal importance.

- ❑ The top management group and the CEO are most involved in creating the mission statement. Consultants are also involved. Despite the fact that the customer is the most frequently mentioned stakeholder in the mission statement, and one of the more important uses of a mission statement is seen as ensuring that the interests of key external stakeholders (e.g. customers) are not ignored, the respondents in this study did not involve customers in the creation of their statements. This was recognized by some as unsatisfactory.

With these findings, it is possible to make the following recommendations to practitioners:

- ❑ Develop a mission statement if you do not have one, since there are many possible benefits from doing so. The most likely benefit is that the statement will guide the firm's strategic planning system.
- ❑ In order to be satisfied with both the statement and the process for creating it, all relevant stakeholders should be involved in creating the statement. This will help to ensure that the firm determines what the mission statement says about the firm's stakeholders and their potentially conflicting interests.
- ❑ Given the variety of possible uses of a mission statement, it is important to decide on the purpose of the mission statement.

Future Research

For further research it would be useful to determine whether the content of the mission statement makes a difference and particularly whether a 'typical' statement is somehow superior to a 'non-typical' statement. In addition, it would be useful to find more firms without mission statements and investigate the most important reasons for not having a mission statement. It would also be useful to explore how con-

sultants are used in the process of creating a mission statement, why customers are not involved in mission statement creation even though they are so often mentioned in the statement itself and how mission statements have been used in firms undergoing change. Finally, it would be useful to determine if the terminology chosen for the statement and the number of statements used makes any difference in terms of satisfaction with the statement(s).

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