

Mission Statement Worksheet

For Your Employees, Your Customers, and Your Business Plan

Complete four steps to create a mission statement that conveys what distinguishes your business from others.

Who reads a mission statement

While a mission statement is a standard section required in a formal business plan, that isn't the main reason to create one. Your primary audiences are the people you work with and those you serve.

Your people read the mission statement to understand what kind of business they've joined. A cleaner who hears it on her first day understands why the schedule is built the way it is, before anyone has to explain a rule to her.

Your customers use your mission statement to judge whether your business is living up to what you promised them. And a lender will read it at the top of your executive summary, where it's the first line telling them what kind of business they're being asked to fund.

How is this worksheet different from other mission statement templates?

The questions in this exercise are built to make you reach past the obvious answers. They'll press you toward answers your competitors couldn't give, and they'll help you get to the bottom of what makes your business distinctive: the specific work you do, the customers you serve, the thing a competitor would have to change their business to copy, and what you do to keep that difference true.

This worksheet walks you through four steps, four questions each. When you're done there's one optional step: page 16 gives you a block to copy into any AI assistant if you want a second opinion on your wording.

The four steps

Step 1	The work you do. What the business does, in plain words.
Step 2	The customers you serve. Who the work is for.
Step 3	The difference you make. What they get from you that they can't get down the street.
Step 4	The commitment behind it. What you do to keep that difference true on the days it would be easier not to.

What You'll Finish With

Two things, and they do different jobs.

A mission statement.

For your customers, your website, and your business plan. It comes out of steps 1, 2 and 3.

A commitment line.

This is the proof behind the claim, and it comes out of step 4. If your mission statement promises the same two cleaners in a customer's building, your commitment line says what happens the week one of them is out sick.

While the mission statement makes the claim, the commitment is the rule that keeps it true. Your people lean on the commitment line most. A cleaner standing in a dark office at nine at night, deciding whether the job is finished, needs a rule she can follow, not a sentence about what the company believes.

Customers read it as well and it's the part that shows you mean what you say.

Meet the Business and Owner in the Example

Evergreen Office & Medical Cleaning

Sarah is the owner. She cleans offices and medical suites in the evenings with two part-time cleaners. Evergreen is the same business that is featured throughout the Business Plan Financials Workbook on this site.

Sarah worked through this worksheet to create a mission statement for her business. Her completed worksheet starts on page 17, and you can read it any time.

Set aside about an hour at your desk, plus a couple of short phone calls. Schedule uninterrupted time so you can focus on the mission of your business. The result will be a mission statement that says what your business is about. It also sets the standard your employees, customers, and business partners can hold you to.

Don't rush the process. You'll get out of it what you put into it.

Step 1. The Work You Do

Here you'll define what the business does. A customer who can't tell what you're offering within a few words stops reading and moves on.

You're not writing a tagline. You're naming the work you do, plainly enough that somebody outside your trade can picture it.

This is how most new business owners answer the first question

"We clean offices."

"We provide quality cleaning services."

Both answers are true. Neither tells a reader anything special, because the phrase fits every cleaning business in the industry.

These answers are better. Any of these three would do the job for Evergreen:

- *We clean medical suites and offices in the evenings, after the last patient has gone home.*
- *Evening cleaning for small medical practices, exam rooms included.*
- *We handle the nightly clean for medical offices, from the waiting room through the exam rooms and the staff areas.*

Each one names the work, says when it happens, and is specific enough that a reader who has never set foot in your building can picture it.

None of the three examples try to be unique yet. Your competitors could describe their work the same way, and that's fine. How your business stands apart from the competition will be addressed in step three.

Step 1. The Work You Do

Now it's your turn. Answer all four questions. Short phrases are fine.

Start rough. Say in plain terms what your business does. Say it the way you'd say it to a neighbor who asked over the fence. No sales words.

Add the when. When does the work happen? Business hours, evenings, weekends, seasonal, on call?

Add the what. What kind of work or what kind of space does it involve? Be specific.

Then check it. What do people assume you do that you don't?

Now write your answer

Rewrite your first answer with the timing and the detail worked in. Then read it against your fourth answer. If somebody could still get the wrong idea about what you do, the sentence isn't finished.

Step 2. The Customers You Serve

A statement that tries to include everybody ends up describing nobody.

Naming your customer specifically does two jobs. The right people read it and know you mean them. The wrong ones read it and move on, which saves you the calls that were never going to turn into work.

This is how most new business owners answer the second question

"Local businesses."

"Small companies."

"Anyone who needs us."

You could apply any of those answers to any cleaning company in town.

These answers are better. Evergreen's customer could be described any of these three ways:

- *Small medical practices with two to six exam rooms.*
- *Medical and dental offices that can't have anyone cleaning in the building during patient hours.*
- *Clinics small enough that the office manager is the one who calls us.*

Every one of them leaves somebody out. That's the test. If you can't think of a business you'd turn away, the answer is still too wide.

Step 2. The Customers You Serve

Now it's your turn. Answer all four questions. Short phrases are fine.

Start with the easy yes. Which customers say yes fastest, with the least convincing?

Name who you turn away. Who have you turned down, or wished you could?

Identify what your target customers share. What do your two best customers have in common? Size, industry, situation, what they were struggling with.

Spot the wrong fit. Who is it, and what tells you?

Now describe your target customer

Write one line naming your customer, built on what your best ones have in common. Then read it back against your answers about who you turn away and who the wrong fit is. Remember, if nobody is left out, the answer is still too wide.

Step 3. The Difference You Make

Naming what makes you different, special, or even exceptional will go a long way toward attracting new clients and inspiring your staff. This is the step too often overlooked by new business owners, and skipping it is the reason many mission statements fall flat.

Anyone can say what they do and who they serve. The question a customer is weighing is why they should choose you rather than the place two blocks over that charges less.

This is how most new business owners answer the third question

"Better service."

"We care about our customers."

"Quality work at a fair price."

Every competitor says the same three things, which means none of them are good answers.

These answers are better. Evergreen could go three ways here. Each one highlights a difference: who does the work, how the work gets checked, and how people are trained for it.

- *We assign the same two cleaners to your building to ensure service is always provided by experienced staff.*
- *Every office building is inspected against a written checklist once a month, unannounced.*
- *Nobody cleans a medical suite until they have shadowed two full shifts and are approved as being fully trained by Sarah, the business owner.*

Look at what Sarah built behind each one. She designed her whole schedule around fixed assignments. She puts an hour a month into an inspection no client asks her for. She pays two people to clean one building while a new cleaner learns it.

That investment is what makes the answer worth writing down. "We care about our customers" costs nothing to say, so every competitor says it. A fixed crew costs Sarah scheduling flexibility, and that's exactly why a competitor who won't give up that flexibility can't honestly claim it.

Promise what you control

"The same two cleaners every week" sounds better than what Sarah wrote, but the first time somebody quits or calls in sick it becomes a lie. She can't guarantee who turns up. What she can guarantee is who she assigns and the training they receive.

So, describe the policy you control rather than the result. A policy survives a bad week. An outcome you can't control turns your statement into something your own people won't believe, which is worse than saying nothing at all.

Before You Answer Step Three

Whether you're clear on what sets your business apart or still working it out, there's one simple step worth taking first.

The thing you do differently is usually the thing you assume everybody does, so it never registers as worth mentioning. Sarah ran Evergreen for a year before a customer told her the unannounced monthly inspections of the crew's work were the reason they'd stayed so long. She thought it was just how you make sure people are doing their job correctly.

So don't guess. Ask.

If you already have customers

Call the two or three who've been with you the longest. Ask these two questions, and write down their words rather than your summary of them:

- What made you pick us in the first place?
- What would you miss if we closed tomorrow?

The second question gets the most valuable information. The customer may not remember why they picked a provider three years ago, but everybody knows what they'd miss if the relationship stopped tomorrow.

If you haven't opened your business yet

Build it into the market research you're already doing. One question for people who buy this service from somebody else: what do you wish you were getting that you're not? The gap in their answer is your opening, and it beats anything you'd come up with at your own kitchen table.

Write down what they said

Write what they said, word for word. You'll use it in step three and again when you take your work to an AI assistant.

Step 3. The Difference You Make

Now it's your turn. Answer all four questions. Short phrases are fine.

Use their words. What did a customer say when you asked why they chose you? Quote them word for word.

Picture the cheaper option. What did your competitor give up to charge less than you?

Listen for value you provide but never talk about. What do customers say about your service? Notice what you never advertised.

Ask what they left behind. Who was the last customer to switch to you from somewhere else, and what were they getting away from?

Now write the difference

Write one line naming the biggest difference your business makes. Take it from whichever answer above came out strongest.

Step 4. The Commitment Behind It

Step three said what the customer gets. This step says what you do to keep that promise true on a day when it would be easier not to.

Step 4 also works as a test of step three. Every question below asks you to name something you already did, like a job you turned down or a rule your people follow when you aren't there. If you come up empty on all four, your step three answer is a claim that's not well supported, and you want to know that before you build a sentence around it.

Your people need this one most. They're the ones you're counting on to deliver on what you promised when the unexpected happens, like the night one of your best people calls in sick. A strong commitment gives them the confidence to do the right thing, whether you're available or not.

This is how most new business owners answer the fourth question

"Integrity."

"We never cut corners."

"Our customers come first."

Nobody can act on any of those. A cleaner reading "integrity" still has no clear idea what to do when her partner calls in sick.

These answers are better. These three line up with the three differences in the prior step, and each names what happens when keeping the promise is inconvenient:

- *When an assigned cleaner is out, the shift goes to Sarah or a cleaner already cross-trained on that building, rather than to someone who has never worked there.*
- *The monthly inspection happens whether or not a client has complained.*
- *New cleaners shadow two shifts before they work a medical suite unsupervised.*

Each one is a decision somebody can make when you aren't available, and each one is backed by something Sarah invests. The first means she cross-trains her staff so a qualified backup is always ready, and covers the shift herself when nobody else can. That's how you tell a commitment from a slogan.

What you build around is what your business ends up known for.

Sarah's customers don't talk about her prices. They talk about not having to check the quality of the work.

Step 4. The Commitment Behind It

Now it's your turn. Answer all four questions. Short phrases are fine.

Name what you protected. What work have you declined to ensure you can always meet your commitment? Name the job.

Draw your line. What would you never do to win a customer, even knowing a competitor does it?

Write the rule. What rule do your people follow to meet the commitment if you aren't available?

Name the investment. What do you invest to support the rule? Time, money, a job you passed on, your own Saturday.

Now write your commitment

Write one line as something you do or refuse to do. The rule your people follow is usually closest. Check it against what you invest to support the rule, because a rule with nothing behind it is a slogan.

That's one line from each of the four steps. Three of them become your mission statement, and the fourth goes underneath it as your commitment line.

Put It Together

Four lines, one from each step, and they're all on paper now. The first three lines go into the pattern below.

① the work ② the customer ③ the difference

First sentence **We ① for ②.**

Second sentence ③.

Two sentences. The first says what you do and who you do it for. The second says what they get from you that they can't get elsewhere. Most mission statements worth reading do those two things in that order and stop.

For the Evergreen example, here are Sarah's first three lines

- ① We clean offices and medical suites in the evenings, after the last patient has gone home.
- ② Small medical practices that can't have cleaners in the building during patient hours.
- ③ We assign the same two cleaners to your building.

Dropped into the pattern for two sentences

First sentence	<i>We clean offices and medical suites in the evenings for small medical practices that can't have cleaners in the building during patient hours.</i>
Second sentence	<i>We assign the same two cleaners to your building, so nobody has to explain the room.</i>

Thirty-nine words in two sentences, and already saying something that distinguishes Evergreen from its competitors.

She changed two things from the three lines to build the two sentences. She dropped "after the last patient has gone home," and she added "so nobody has to explain the room," which is her customer's phrase, almost word for word.

That second change is the one to pay close attention to. Go back to the quote you wrote down in step three and read it again. The reason somebody should pick you is often right there, in better words than you'd choose, because they come from an existing or prospective customer.

Write Your Draft

Now it's your turn. Take each line you created from the first three steps and drop them into the pattern. Write it long and let it be clumsy, because the next page is built for refining your mission statement.

① the work ② the customer ③ the difference

First sentence We ① for ②.

Second sentence ③.

If you're holding two differences. Sarah ran into this issue. A customer had told her the unannounced monthly inspection was why they stayed, and it was every bit as real as assigning the same two person crew. She used the crew because it's the thing customers named the most. The other one doesn't go to waste. Put it in your step 4 commitment, on your about page, and in what you tell somebody on their first day.

Don't get stuck with one pattern. Move the pieces around to suit how your business talks. A shop might open with "We make." Your step 4 commitment stays out of the sentence and gets its own line on the next page.

Write the first draft of a mission statement

Sharpen It

Aim for twenty-five words or fewer. Two passes usually get you there.

Pass one, strike the borrowed words

Cross out every one of these you find. You can read all eighteen on any Fortune 500 about-page, and not one of them tells you what the company sells.

world-class · best-in-class · cutting-edge · industry-leading · innovative · solutions · synergy · leverage · empower · passionate · committed to excellence · exceed expectations · customer-centric · value-added · quality service · integrity · strive · dedicated to

Pass two, strike what a competitor could also say

Read your draft as though your closest competitor had written it and put their name on top. Any phrase that would still be true for them comes out.

Your customer often disappears in this pass, and that's fine. Sarah's finished statement never says "small medical practices," because "medical suites" already tells a reader who she works for.

Your mission statement

Your commitment line

One line from step 4. It's a rule rather than a claim, so it goes underneath rather than inside: on your about page, in a proposal, in the conversation when you hire somebody, and on the wall where your crew can see it.

Three Checks Before You Call It Done

All three have to pass.

☐ 1. Does the opposite of your sentence sound like a real business?

Write your sentence down. Underneath it, write the opposite. Then ask whether any real company would put that opposite version on their own website.

Yours: We're committed to quality work.

Opposite: We're committed to sloppy work.

No company would ever say that, so your sentence tells a customer nothing.

Sarah's: We assign the same two cleaners to your building.

Opposite: We send one cleaner and it can be whoever is free that night.

Most of her competitors work exactly that way, and they'd defend it, because one floating cleaner costs less to schedule than a two person crew. Her sentence passes, because it names a choice her competitors didn't make.

☐ 2. Could a new hire tell it's your company and no other?

You can't run this one on yourself. Say your draft reads, "We provide reliable service to small businesses." You read "reliable" and picture answering the phone on a Sunday, because you know you'll answer the phone any time of day. A new hire reads "reliable" and has no clear vision of what that means.

So hand it to whoever you hired most recently and give them two choices: does this describe us specifically, or could any company in our line of work say the same thing? Your newest people are the right ones to ask, because a lot of them worked for a competitor a month ago and have seen the other way of doing things.

If they pick "any company," you have your answer. If they say it's specific to you, ask which part, and check whether they point at the same thing you meant. The point here is to get an honest unbiased opinion.

☐ 3. Can you say it out loud without looking?

Close the document and say your mission statement out loud. If you stumble, count the words. Sarah's runs twenty. The aim is twenty-five or fewer, and past thirty you'll trip on it every time.

If a check fails

Nearly always, the sentence describes the work, and every competitor does that same work.

Work only: We clean medical offices in the evenings.

Work plus difference: We clean medical offices in the evenings with the same two cleaners assigned every visit.

Go back to step 4 and read your investment box. Whatever you invest is your difference, because a competitor who won't invest the same thing can't honestly make the same claim. Sarah's was covering two routes herself the week a cleaner had the flu, which is what makes "the same two cleaners" worth printing. Put yours in the sentence and check again.

Rewrite it here

Test Your Mission Statement with AI

You have two finished pieces now: a mission statement and a commitment line. An AI assistant can't improve the thinking behind them, because it doesn't know you or your customers. What it can do is test your wording, tell you where a competitor could say the same thing, and offer alternatives built only from the facts you give it. You decide which version sounds most like you.

Fill in the eight answers below, then copy the whole box and paste it into whichever AI assistant you use. ChatGPT, Claude, Gemini and Copilot all work the same way.

I did the Mission Statement Worksheet from Leadership-Tools.com. Here's my finished work.	
The work:	
The customer:	
When the work happens:	
The difference:	
What a customer said, word for word:	
What I invest to support it:	
My mission statement:	
My commitment line:	
Run my mission statement through three checks and tell me how it does on each, one line each. 1. Does the opposite of it sound like a real business? 2. Could a new hire tell it's my company and no other? 3. Is it short enough to say out loud without stumbling? Count the words and show the count. Then write two alternatives, 25 words or fewer each, built only from the facts above. Under each one, name what it leaves out. Don't rewrite my commitment line. It's a rule I keep, not wording to polish. If an alternative makes a claim my commitment doesn't back up, say so. Rules. Don't add a fact I didn't give you, not even a small or likely one. Don't build anything on price. Never use these words: world-class, best-in-class, cutting-edge, industry-leading, innovative, solutions, synergy, leverage, empower, passionate, committed to excellence, exceed expectations, customer-centric, value-added, quality service, integrity, strive, dedicated to. Don't tell me a version is great, strong or powerful. Say what works and what doesn't. I decide which one sounds like me.	

Working on paper? Nothing here depends on this step. What you've written is finished as it stands. The prompt gives you alternatives and a second opinion, and the final decision is yours to make.

Sarah's Worksheet, Filled In

Evergreen Office & Medical Cleaning

Her first answers are here alongside her final ones, because the first ones were no better than anybody else's. What changed them was the four questions underneath.

Step 1. The work

Her first answer: *We clean offices.*

Say it the way you'd say it to a neighbor.

We clean offices.

When does the work happen?

Evenings, after the last patient has gone. Usually between six and ten.

What kind of work or space?

Offices and medical suites. Exam rooms, waiting rooms, staff bathrooms.

What do people assume you do that you don't?

Houses. People hear cleaning and picture housekeeping.

What she wrote: We clean offices and medical suites in the evenings, after the last patient has gone home.

Step 2. The customer

Her first answer: *Local businesses.*

Which customers say yes fastest?

Small medical practices, two to six exam rooms.

Who have you turned down?

Houses, a retail floor, and a construction cleanup job.

What do your two best customers have in common?

Both have patients in the building all day, so nothing can be cleaned until they close.

Who is the wrong fit, and what tells you?

Anyone who asks whether we can come during the day.

What she wrote: Small medical practices that can't have cleaners in the building during patient hours.

Step 3. The difference

Her first answer: *Better service. We care about our customers.*

What did a customer say when you asked why they chose you?

"I don't have to explain the room to anybody. It's the same two women every week and they know where everything goes."

What did your competitor give up to charge less than you?

A fixed crew. They send whoever is free that night, so nobody knows the building.

What do customers say about your service? Notice what you never advertised.

That we inspect the crew's work every month, unannounced. My longest customer said it's the reason they stayed. I thought everybody did that.

Who switched to you, and what were they getting away from?

A pediatric practice that left a franchise. Different crew every week, and they kept finding the sharps container missed.

What she wrote: We assign the same two cleaners to your building.

Step 4. The commitment

Her first answer: *Integrity.*

What work have you declined to ensure you can always meet your commitment?

A four-office contract that wanted daytime cleaning. Worth \$2,600 a month.

What would you never do to win a customer?

Send somebody into a medical suite who has never worked that building.

What rule do your people follow to meet the commitment if you aren't available?

If an assigned cleaner is out, the shift goes to someone who has already worked that building, either me or a cross-trained cleaner.

What do you invest to support the rule?

I cross-train staff so qualified back-up cleaners are available to cover unexpected absences. I passed on the \$2,600 contract, covered two routes myself for a week in February while one cleaner had the flu, and put an hour a month into inspections nobody asks me for.

What she wrote: When an assigned cleaner is out, the shift goes to someone who has already worked that building, either me or a cleaner cross-trained on it.

What Sarah Ended Up With

Assembled, using the pattern

We clean offices and medical suites in the evenings for small medical practices that can't have cleaners in the building during patient hours. We assign the same two cleaners to your building, so nobody has to explain the room.

She trimmed “after the last patient has gone home,” which her second line already covered, and added “so nobody has to explain the room” from her customer’s own words.

Thirty-nine words. Long, and already saying something no competitor’s statement says.

Sharpened

Nothing on the strike list appeared, because she wrote plainly to begin with. The second pass did the work. Her customer dropped out too, since “medical suites” already says who she cleans for.

Second draft: We clean medical suites after hours for practices that can't have cleaners in during patient hours, with the same two cleaners assigned to your building. (25 words)

Final: We clean medical suites after hours with a crew assigned to your building, so nobody has to explain the room. (20 words)

The three checks

Opposite? Plenty of cleaning companies send whoever is free that night, because a fixed assignment takes more scheduling. **Passes.**

New hire? The evening route and the assigned crew are both in there, so a cleaner hired on Monday would know which company she had joined. **Passes.**

Out loud? Twenty words with nothing to trip on. **Passes**

Sarah's Block, Filled In

This is the block from page 16 with Evergreen's answers in it. Copy it and paste it into an assistant if you want to see what comes back before you fill in your own. What you get will vary from one assistant to the next, and that's fine. You're watching for whether it can name something in the sentence a competitor couldn't say.

I did the Mission Statement Worksheet from Leadership-Tools.com. Here's my finished work.	
The work:	We clean offices and medical suites in the evenings, after the last patient has gone home.
The customer:	Small medical practices that can't have cleaners in the building during patient hours.
When the work happens:	Evenings, after the last patient has gone. Usually between six and ten.
The difference:	We assign the same two cleaners to your building.
What a customer said, word for word:	"I don't have to explain the room to anybody. It's the same two women every week and they know where everything goes."
What I invest to support it:	I cross-train staff so qualified back-up cleaners are available to cover unexpected absences. I passed on the \$2,600 contract, covered two routes myself for a week in February while one cleaner had the flu, and put an hour a month into inspections nobody asks me for.
My mission statement:	We clean medical suites after hours with a crew assigned to your building, so nobody has to explain the room.
My commitment line:	When an assigned cleaner is out, the shift goes to someone who has already worked that building, either me or a cleaner cross-trained on it.

Run my mission statement through three checks and tell me how it does on each, one line each.

1. Does the opposite of it sound like a real business?
2. Could a new hire tell it's my company and no other?
3. Is it short enough to say out loud without stumbling? Count the words and show the count.

Then write two alternatives, 25 words or fewer each, built only from the facts above. Under each one, name what it leaves out.

Don't rewrite my commitment line. It's a rule I keep, not wording to polish. If an alternative makes a claim my commitment doesn't back up, say so.

Rules. Don't add a fact I didn't give you, not even a small or likely one. Don't build anything on price. Never use these words: world-class, best-in-class, cutting-edge, industry-leading, innovative, solutions, synergy, leverage, empower, passionate, committed to excellence, exceed expectations, customer-centric, value-added, quality service, integrity, strive, dedicated to. Don't tell me a version is great, strong or powerful. Say what works and what doesn't. I decide which one sounds like me.

Where Sarah Landed

EVERGREEN'S MISSION STATEMENT

We clean medical suites after hours with a crew assigned to your building, so nobody has to explain the room.

EVERGREEN'S COMMITMENT LINE

This goes underneath her mission statement, and it's the first thing she tells a new cleaner.

When an assigned cleaner is out, the shift goes to someone who has already worked that building, either me or a cleaner cross-trained on it.

What To Do With It Now

A mission statement that lives only in your business plan isn't doing the job it was written for.

Sarah's goes in three places. It opens her business plan, which is the use everybody thinks of first and the least important of the three. It comes up when she hires new people, because a cleaner who hears it on her first day understands why the schedule is built the way it is before anyone has to explain a rule to her. And it's taped inside the supply cupboard door, where the crew sees it every shift as a constant reminder of why they are here.

In two of those three, the commitment line goes with the mission statement. The business plan is the exception, because the executive summary has room for one line and nothing more. If your plan has a company description section, that's where the commitment belongs, since it's the evidence a lender would appreciate seeing.

Come back to it when the business changes shape. A new service line, a different kind of customer, a partner buying in. The four questions still work, and the answers will have moved.