

## Social Purpose Roadmap

### Seven Steps to Developing and Implementing Your Social Purpose

#### Introduction

The Social Purpose Roadmap is a practical guide designed to help businesses define and bring to life a meaningful social purpose. This step-by-step approach empowers organizations to articulate their unique role in building a better world, while fostering growth, innovation, and lasting impact.

Through this roadmap, businesses can navigate the journey from understanding and crafting their purpose to embedding it in their operations and sharing their progress.

#### Seven Steps Overview

##### Phase 1: Develop Your Social Purpose

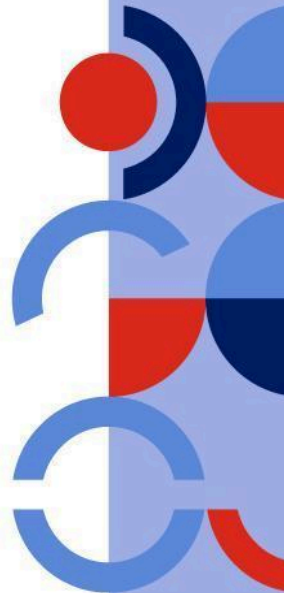
1. **Educate:** Build awareness among leaders and staff.
2. **Research:** Identify strengths, opportunities, and societal focus areas.
3. **Define:** Craft and validate your social purpose.

##### Phase 2: Implement Your Social Purpose

1. **Plan:** Establish an implementation framework.
2. **Embed:** Align culture, strategy, and operations.
3. **Collaborate:** Foster partnerships and stakeholder engagement.
4. **Report:** Share progress and ensure continuous improvement.

This roadmap is supported by practical tools, resources, and case studies to guide your business at every stage of the process. These resources are developed by a range of organizations including Canadian Purpose Economy Project, United Way BC Social Purpose Institute, Junxion Strategy and others.

To learn more about these steps, a [free recorded webinar series](#) is available on the BC Chamber of Commerce website, offering deeper insights and practical guidance on implementing social purpose in your business. Those who complete the series are offered a Completion Certificate in Social Purpose Business Training.



## Social Purpose Roadmap: Seven Steps to Developing and Implementing Your Social Purpose

Phase 1: Develop Your Social Purpose			Phase 2: Implement Your Social Purpose			
1) Educate	2) Research	3) Define	4) Plan	5) Embed	6) Collaborate	7) Report
<ul style="list-style-type: none"> <li>Educate management and board on social purpose</li> <li>Gain agreement to proceed</li> <li>Agree on company's business case and rationale</li> <li>Update staff</li> <li>Recruit social purpose steering committee</li> </ul>	<ul style="list-style-type: none"> <li>Research company background</li> <li>Identify unique strengths to leverage</li> <li>Shortlist community or societal issues</li> <li>Consult stakeholders on focus and greater good potential</li> </ul>	<ul style="list-style-type: none"> <li>Hold social purpose workshop</li> <li>Draft social purpose options</li> <li>Draft social purpose narrative</li> <li>Engage stakeholders to validate your social purpose</li> <li>Approve social purpose statement</li> <li>Update staff</li> </ul>	<ul style="list-style-type: none"> <li>Renew steering committee</li> <li>Create a Social Purpose Implementation Plan</li> <li>Include social purpose oversight in Board governance documents (if relevant)</li> </ul>	<ul style="list-style-type: none"> <li>Educate and engage employees</li> <li>Embed social purpose in culture and decisions</li> <li>Update vision and corporate strategy with social purpose goals</li> <li>Embed social purpose in products and services</li> </ul>	<ul style="list-style-type: none"> <li>Embed social purpose in the customer experience</li> <li>Prioritize and engage stakeholders</li> <li>Build external social purpose collaborations</li> <li>Advance the Purpose Economy</li> </ul>	<ul style="list-style-type: none"> <li>Regularly review performance</li> <li>Implement regular purpose storytelling and communications</li> <li>Update website and marketing strategy</li> <li>Disclose purpose progress through annual report</li> <li>Continuous improvement</li> </ul>



## Resources

### Phase 1: Develop Your Social Purpose

#### Step 1: Educate

- [Definition of a Social Purpose Business](#)
- [Four Types of Purpose](#)
- [Social Purpose Continuum](#)
- [Social Purpose Business Case Statistics](#)
- [Social Purpose Business Case](#)

#### Step 2: Research

- [Researching your Social Purpose](#)

#### Step 3: Define

- [How to Find Your Company's Purpose](#)
- [How to Write a Purpose Statement](#)
- [Social Purpose Statement Criteria](#)

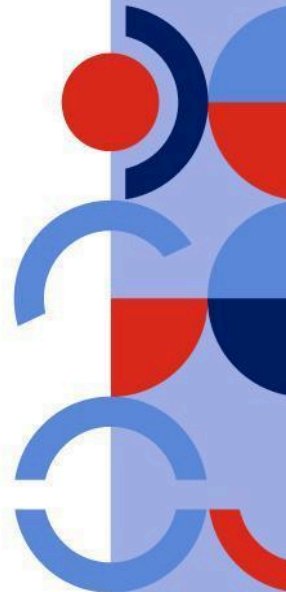
#### Social Purpose Development Case Studies

- [Return It \(pdf\), \(video\)](#) | An industry-owned, product stewardship organization with beverage container management as its core business.
- [LGM Financial Services \(pdf\), \(video\)](#) | An automotive financial services company, offering finance and insurance products to automotive brands and dealers across Canada.
- [Hemlock Printers \(pdf\), \(video\)](#) | Western Canada's largest commercial printer offering digital, offset, display signage, mailing, warehousing, fulfilment, and distribution services.

### Phase 2: Implement Your Social Purpose

#### Step 4: Plan

- [Social Purpose Implementation Plan](#)



- [Board Purpose Oversight](#)

#### Step 5: Embed

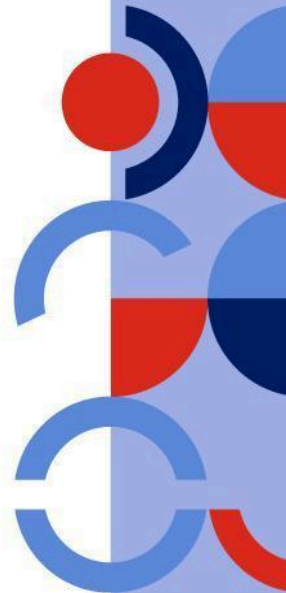
- [Employee Engagement Examples](#)
- [Employee Purpose Engagement Checklist](#)
- [Employee Social Purpose Lifecycle Tool](#)
- [Employee Engagement Survey Questions](#)
- [Social Purpose Job Descriptions](#)
- [Executive Social Purpose Roles](#)
- [Social Purpose Values Examples](#)
- [Social Purpose Decision Lens Examples](#)
- [Social Purpose Decision Lens Tool](#)
- [Social Purpose Departments Checklist](#)
- [Social Purpose Strategy: Bring Your Corporate Purpose to Life](#)
- [CSR / ESG Transition Examples](#)
- [Social Purpose Process Metrics Examples](#)
- [Social Purpose Impact Goals Examples](#)
- [Social Purpose Product Transition Examples](#)
- [Social Purpose Product Transition Plan Tool](#)

#### Step 6: Collaborate

- [Social Purpose External Communications Examples](#)
- [Social Purpose Customer Lifecycle Examples](#)
- [Marketing on Purpose](#)
- [Customer Satisfaction Survey Questions](#)
- [Social Purpose Stakeholder Transformation Examples](#)
- [Social Purpose and ESG Collaboration Toolkit](#)
- [The Social Purpose Professional](#)
- [Toolkit to Grow the Purpose Economy](#)
- [Social Purpose Procurement Toolkit](#)

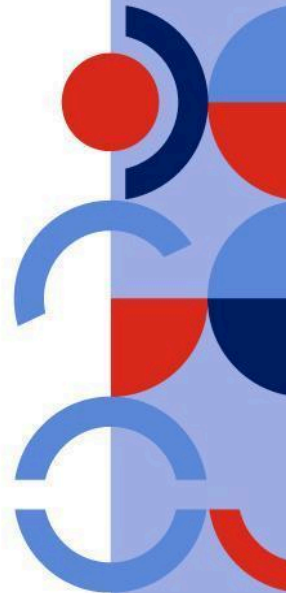
#### Step 7: Report

- [Social Purpose Assessment Tool](#) | United Way BC Social Purpose Institute
- [Purpose Disclosure and Reporting Guidelines](#)



### **Social Purpose Implementation Case Studies**

- [Coast Capital](#) | A financial cooperative and Certified B Corp founded in 1940.
- [Hemlock Printers](#) | Western Canada's largest commercial printer offering digital, offset, display signage, mailing, warehousing, fulfilment, and distribution services.





## About the Canadian Purpose Economy Project

The Canadian Purpose Economy Project exists to accelerate the transition to the purpose economy. It engages national ecosystem actors to create an enabling environment for social purpose businesses to start, transition, thrive and grow. This paper is one in a series of reports exploring the roles of key actors to advance social purpose in business including accountants, boards, investors, associations, business schools and others. We are grateful to Coast Capital, our Founding Purpose Champion, for their support.

Subscribe to our updates at [www.purposeeconomy.ca](http://www.purposeeconomy.ca) and sign our Call to Purpose to help us advance social purpose in business.