



**Tecnológico  
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W H I T E   P A P E R

# Key Purpose Indicators

*Measuring What Matters Most in Purpose-Driven Companies*

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## Executive Summary

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Traditional Key Performance Indicators (KPIs), while essential for operational insight, fail to capture the deeper impact that purpose-driven organizations seek to create. In this article, we introduce the concept of **Key Purpose Indicators (KPIIs)**—a new class of metrics designed to measure an organization’s progress toward fulfilling its stated purpose. KPIIs do not replace conventional financial measures; they complement and enrich them, illuminating not just what a company earns but what it stands for.

We illustrate the power of KPIIs through examples from purpose-driven corporations. Southwest Airlines tracked the democratization of air travel, measuring the growing percentage of Americans who had flown. Walmart quantifies its impact on community affordability, with research showing families in its trade areas save approximately \$3,400 annually. Patagonia measures environmental stewardship through carbon reductions, recycled materials usage, and acres of land preserved. Microsoft monitors digital inclusion, accessibility, and organizational empowerment across underserved communities worldwide.

We then present a detailed case study of First United Bank, demonstrating that KPIIs are accessible to organizations of all sizes. The bank developed a comprehensive framework built around four pillars—financial well-being, health, personal growth, and faith—using a sophisticated blend of subjective, objective, and behavioral measures. Notably, alongside this purpose-driven approach, the bank has achieved 672% asset growth and 183% net revenue growth since 2010, illustrating that purpose and profit are mutually reinforcing.

Finally, we offer a practical framework for developing KPIIs, emphasizing clarity of purpose, stakeholder mapping, measurability, and continuous refinement. We also address common challenges organizations face on this journey, including internal resistance, the difficulty of quantifying intangible impact, and the need to balance purpose with financial performance. Effective KPIIs, we argue, are measurable, actionable, relevant, time-bound, and stakeholder-inclusive—serving not just as metrics but as commitments to a broader vision of what business success can and should mean.

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# The Limitations of Traditional Metrics

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*“It measures everything except that which makes life worthwhile.”*

Consider, for a moment, the words of a wise observer on America’s gross national product. This insight highlights a question that echoes across boardrooms today: Are we measuring what truly matters? As businesses tally profits, track growth, and compare stock performances, they often lose sight of a fundamental truth: traditional Key Performance Indicators (KPIs), while useful for operational insight, paint an incomplete picture. They reward efficiency and profit, often at the expense of deeper, intangible values. Metrics like net margins and growth rates offer precision but leave companies blind to the human, societal and ecological impact of their actions.

*In this relentless pursuit of numerical precision, have we lost sight of measuring something far more precious—the very reason we exist?*

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## A New Metric for Meaningful Impact

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*“Humans need red blood cells to live, but the purpose of life is not to produce red blood cells. Companies need profit to live, but that’s not why they exist.” — Ed Freeman*

This is where a new paradigm emerges, driven by purpose-driven performance indicators, which we refer to as **Key Purpose Indicators—KPIs**, a set of metrics focused not on financial returns but on fulfilling the company’s deeper purpose.

Key Purpose Indicators serve as a compass, guiding companies toward their core purpose and illuminating the path to meaningful impact. By broadening the lens through which success is measured, purpose-driven companies integrate Key Purpose Indicators alongside traditional KPIs, capturing stories of lives improved, communities uplifted, and values upheld. This approach doesn’t replace performance metrics; it complements and enriches them, illuminating not just what a company earns but what it stands for.

Key Purpose Indicators help companies chart their progress toward their purpose. For Southwest Airlines, it meant tracking the democratization of air travel; for Walmart, it’s about reducing the cost of living in surrounding communities; for Patagonia, it’s measuring their

contribution to environmental conservation. These companies do more than just talk about their purpose, they hold themselves accountable to the fulfillment of the Purpose by finding ways to measure the impact they aspire to make.

Key Purpose Indicators invite us to shift from a purely performance-driven mindset to one also rooted in purpose and positive impact. Profit is still vital—it fuels the journey—but purpose becomes the destination. As more companies embrace these indicators, we begin to see a redefinition of success: not as a race to maximize earnings but as a journey toward purpose, connection, and meaningful impact.

This is the promise of Key Purpose Indicators: a way to measure what truly matters in purpose-driven companies.

Let us look at companies that exemplify this shift.

## **Southwest Airlines: Democratizing the Skies**

When Herb Kelleher and Colleen Barrett led Southwest Airlines and declared their purpose was “to give people the freedom to fly,” they committed to more than just tracking load factors and market share. They pursued a vision of democratizing the skies, aiming to make air travel accessible to ordinary people rather than just the affluent. At their Love Field headquarters, a striking visual tracked this journey, displaying how the percentage of Americans who had ever flown grew from just 49% in 1971 to 87% by 2022. This visual reminder underscored Southwest’s progress toward fulfilling its purpose.

They also worked with the Department of Transportation to measure their impact on air travel, which came to be called “the Southwest Effect”—a phenomenon where air travel increased by 20% in markets they entered, thanks to their affordable pricing model. These purpose-driven indicators measured something far beyond profitability: they documented Southwest’s role in making air travel routine, not a luxury, and in spreading the joy and freedom of exploration. By democratizing the skies, Southwest Airlines turned their Key Purpose Indicators into a narrative of mobility, access, and empowerment for all travelers.

## **Walmart: Saving People Money and Helping Them Live Better**

Inspired by founder Sam Walton’s vision of helping people “save money and live better,” Walmart’s purpose-driven metrics go beyond tracking store sales to measure their impact on local communities. Research shows that living within a Walmart trade area reduces a family’s annual expenses by approximately \$3,400, underscoring Walmart’s role in making life more affordable for millions. This isn’t just a byproduct of low prices; it’s a purposeful outcome aligned with Walton’s purpose to ease financial burdens and improve quality of life.

Walmart's commitment to affordability is also reflected in customer feedback. Surveys show that over 90% of their customers agree that "Walmart saves me money and helps me live better." This is more than a customer satisfaction metric; it's validation of a purpose fulfilled. For Walmart, these indicators are a testament to its impact on everyday lives, offering tangible proof that "everyday low prices" drive not just savings but elevate customers' quality of life.

## **Starbucks: Inspiring and Nurturing the Human Spirit**

Guided by the purpose "to inspire and nurture the human spirit—one person, one cup, and one neighborhood at a time," Starbucks has developed Key Purpose Indicators that measure its broader impact on communities, partners, and employees. These purpose-driven metrics track community engagement initiatives, including job creation and support for local projects, highlighting Starbucks' role as a positive force in neighborhoods where it operates.

Starbucks also measures the well-being of its suppliers and partners, especially coffee farmers, by assessing the economic and social impact of fair trade and ethical sourcing. Customer experience metrics capture the emotional connection that people feel with Starbucks' spaces, while employee satisfaction indicators, including engagement and turnover rates, reveal the quality of the work environment.

Together, these metrics tell a story that goes beyond transactions. They reflect Starbucks' commitment to creating an inclusive, supportive environment that connects individuals, enriches communities, and promotes shared prosperity.

## **Patagonia: In Business to Save Our Home Planet**

Patagonia has redefined success with its purpose "to save our home planet," embracing purpose-driven metrics that measure environmental stewardship and activism. While most companies focus on traditional performance indicators, Patagonia's Key Purpose Indicators prioritize the health of the planet, challenging conventional definitions of business success.

The company's KPUIs track reductions in carbon emissions, water usage, and waste across its supply chain, along with the percentage of sustainably sourced and recycled materials in its products. Patagonia also measures the social impact of its contributions to environmental organizations, monitoring grants distributed, policy changes influenced, and hours employees devote to environmental causes.

To promote a circular economy, Patagonia tracks the usage of its repair centers, the sales volume of second-hand garments, and participation in recycling programs, emphasizing product longevity and waste reduction. Through its commitment to environmental activism, Patagonia documents acres of land preserved, environmental lawsuits supported, and grassroots campaigns fueled, transforming itself from an apparel provider into a movement leader.

These purpose-driven metrics demonstrate Patagonia's dedication to its purpose and invite consumers to join a global conservation effort, where each purchase contributes to preserving and protecting the planet.

## **Microsoft: Empowering Every Person and Organization to Achieve More**

Microsoft's purpose, "to empower every person and every organization on the planet to achieve more," is reflected in Key Purpose Indicators that extend beyond product performance to focus on access, inclusion, sustainability, and customer impact. These metrics underscore Microsoft's commitment to expanding digital empowerment and supporting global advancement.

To increase digital inclusion, Microsoft tracks the reach and impact of its technology programs in underserved communities, including the number of people trained in digital skills, the adoption rates of accessibility features, and initiatives to expand internet access. Additionally, Microsoft's educational programs focus on reaching students and teachers, tracking metrics such as the number of educational institutions using Microsoft tools, student learning outcomes, and teacher training effectiveness.

Organizational empowerment is also a core metric, measured by the impact of Microsoft's support for small businesses, nonprofits, and developing regions. This includes tracking digital transformation among small businesses, cloud adoption in emerging economies, and the extent to which artificial intelligence tools are accessible and beneficial.

Microsoft's KPUIs also encompass workplace inclusion and sustainability commitments, tracking diversity initiatives, carbon neutrality progress, and water positivity efforts. Finally, customer empowerment is monitored through improvements in productivity and innovation enabled by Microsoft products, demonstrating how technology can help individuals and organizations achieve more in their own missions.

Together, these purpose-driven metrics illustrate Microsoft's dedication to global empowerment, measuring success not only by reach and revenue but by the positive, inclusive impact on people and communities worldwide.

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Through Key Purpose Indicators, companies honor their commitments by illustrating what it means to truly fulfill the promise of their Purpose. These metrics ignite a transformative journey within an organization, one that is almost poetic in its impact. Employees see their work as part of something meaningful, customers feel a connection that transcends the transaction, and communities experience a company actively contributing to the common good.

In this way, Key Purpose Indicators don't merely measure impact—they deepen it, fostering an authentic bond between a company and its stakeholders. Each of these companies demonstrates the power of purpose-driven performance indicators to look beyond profit and track meaningful impact. These indicators serve as milestones in a journey to create meaningful value for society, not just monetary value for shareholders.

Importantly, the shift to Key Purpose Indicators is not limited to large corporations. As we'll explore through the example of First United Bank, purpose-driven performance indicators are accessible to businesses of all sizes, bringing the potential for genuine impact into the heart of every organization.

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## First United Bank: A Case Study in Purpose Measurement

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First United Bank offers a compelling model for purpose-driven metrics, rooted in its purpose to “inspire and empower others to spend life wisely.” This purpose is embedded across every layer of the organization, with Key Purpose Indicators (KPIs) centered around the four pillars that they believe contribute to a life well spent: financial well-being, health, personal growth, and faith. These pillars reflect the bank's commitment to a holistic, community-centered definition of success that touches employees, customers, and communities alike.

For each pillar, First United employs a sophisticated framework combining:

- 1. Subjective Measures** — Gauging how people feel about that area of their life.
- 2. Objective Measures** — Quantifiable measurements not influenced by personal opinions.
- 3. Known Contributors** — Tracking behaviors scientifically shown to drive positive outcomes.

### Financial Well-being: A New Approach to Prosperity

At First United Bank, financial well-being encompasses more than balance sheets. KPIs here include subjective measures, such as whether employees and customers have worried about money in the past seven days, alongside objective metrics like credit scores and savings rates. To deepen this, the bank monitors behaviors that enhance financial security, like making meaningful purchases and investing in experiences rather than material goods.

In a recent survey, 58% of employees and 55% of customers reported feeling financially “thriving,” revealing both areas of strength and opportunities for further support. This feedback

loop helps First United target resources where they're most needed, demonstrating an ongoing commitment to fostering financial wellbeing.

## **Health and Wellness: Measuring a Different Kind of Wealth**

First United recognizes that financial security is intertwined with physical well-being, as the number one cause of personal bankruptcy in the U.S. is a medical crisis. The bank's KPUIs for health track subjective indicators like energy levels and experiencing more happiness than sadness on a given day, as well as objective markers like preparedness for health events and prevalence of lifestyle-related diseases. The bank doesn't merely monitor these metrics—it actively promotes healthy lifestyles through wellness programs, community events, and resources that encourage physical well-being.

By investing in health, First United nurtures a different kind of wealth: the richness of a life lived fully and well, reducing the potential for medical expenses that can destabilize financial health.

## **Personal Growth: Empowerment Through Learning and Connection**

First United's focus on personal growth emphasizes lifelong learning, self-awareness, and meaningful connections. Purpose indicators for this pillar include both subjective assessments of knowing your strengths and having a sense of Purpose and objective participation in learning opportunities. Employees and customers are encouraged to engage in behaviors like meeting with diverse types of people, meeting with trusted mentors, and learning new skills, fostering both individual growth and community cohesion.

In a world often divided by social and ideological lines, these KPUIs promote inclusion and empathy, helping employees and customers alike feel a strong sense of belonging and purpose. This commitment to personal growth reinforces First United's purpose in a meaningful, data-driven way.

## **Faith: Cultivating a Life of Love and Service**

Faith, a central pillar at First United Bank, reflects an inclusive commitment to spiritual growth and kindness. Purpose indicators here include subjective feelings of how frequently one expresses love and kindness, as well as objective metrics like participation in faith-based communities and volunteerism. The bank encourages practices that support spiritual health, such as gratitude, meditation, and community service, tracking the impact of these initiatives.

By measuring faith, First United embraces a multifaceted definition of well-being, one that includes spiritual health alongside financial and physical wellness. In a business world where

spirituality is rarely measured, First United's approach stands as a testament to its comprehensive view of purpose.

## The Impact of Purpose-Driven Metrics

First United Bank's Key Purpose Indicators reveal profound results. Among employees, 58% report they are thriving overall, while only 4% indicate they are struggling. These metrics also highlight specific areas of need—such as physical and financial health—by various employee and customer demographics, allowing the bank to direct support where it will have the greatest impact. Moreover, customers who participate in the bank's purpose-driven offerings report significantly higher levels of thriving across all dimensions of well-being.

Through this comprehensive approach, First United demonstrates that its success is multifaceted, extending far beyond financial transactions to encompass true transformations in the lives of employees, customers, and communities.

*First United Bank has achieved extraordinary traditional KPI success: 672% asset growth and 183% net revenue growth since 2010. But if you ask any employee what makes them proud to work there, they likely won't talk about the numbers. Instead, they'll share stories of people empowered to spend life wisely.*

## Developing Key Purpose Indicators

For any organization, developing Key Purpose Indicators is both an art and a science. It is a journey that begins with introspection. Ask yourself: Whose lives do we touch? How can we measure the difference we aim to make? For some, like First United Bank, this means exploring subjective, objective, and behavioral metrics. For others, it may involve measuring the ripple effects of social initiatives or environmental stewardship.

Consider these questions as a starting point to guide your organization:

*What should be your most meaningful purpose indicator? Which metric, if improved, would generate the greatest pride among your team? How can you measure the full spectrum of your impact?*

As your purpose indicators take shape, you'll realize they are not just metrics; they are promises and commitments to a brighter future made possible by the work of your organization.

To create effective Key Purpose Indicators, organizations must begin with a deep understanding of their purpose, translated into measurable outcomes. Here's a framework to guide this transformative process:

### **1. Start with Clarity of Purpose**

Articulate the core impact your organization seeks to achieve. Purpose statements should define the difference you aim to make, not merely the benefits you provide to shareholders.

### **2. Map Stakeholders and Their Needs**

Purpose-driven metrics often affect multiple groups—customers, employees, communities, and even the environment. Identify your stakeholders and define what success looks like for each, creating a comprehensive KPUI framework.

### **3. Design Purpose-Driven Indicators**

Craft KPUIs that capture the impact you aim to create by incorporating a balanced mix of subjective measures, such as personal experiences, objective metrics that reflect tangible outcomes, and known contributors—actions proven to drive meaningful results. When designing these metrics, prioritize measurability by ensuring the data collected is both reliable and quantifiable. Equally important is relevance; each metric should authentically reflect the fulfillment of your organization's purpose. Lastly, ensure actionability by selecting metrics that offer clear insights to guide better decision-making.

### **4. Embrace Flexibility and Continuous Improvement**

Purpose is dynamic, evolving with societal needs and company values. KPUIs should be adaptable, allowing for updates as new insights or priorities emerge.

### **5. Integrate Data with Human Stories**

Data is essential, but purpose-driven performance indicators gain richness from the human stories behind the numbers. Qualitative feedback and personal narratives bring the data to life, ensuring metrics remain connected to real lives.

### **6. Regularly Review and Refine KPUIs**

Regularly reviewing and refining KPUIs is crucial to maintaining their relevance and effectiveness. Incorporate stakeholder feedback to adapt to evolving goals, ensuring the metrics remain aligned with your organization's purpose. Establish regular assessment intervals to consistently track progress and evaluate the impact of your efforts. Transparent reporting mechanisms are vital for communicating findings, keeping stakeholders informed and engaged. Use the insights gathered to develop actionable plans that address areas of improvement and strengthen alignment with your mission.

By following this framework, organizations can develop Key Purpose Indicators that not only track progress but also reinforce the organization’s purpose, ensuring a clear and ongoing connection between purpose and practice. This approach also addresses potential criticisms of purpose-washing by providing tangible data to demonstrate the real impact your organization is making in the world.

When purpose-driven metrics are done well, something remarkable happens—organizations don’t just perform better; they matter more. They become indispensable in the lives of their stakeholders, especially employees who want meaningful work, cementing deep emotional connections between them and the company.

## Characteristics of Effective KPUIs

<b>Measurable</b>	Metrics should be quantifiable and consistently trackable.
<b>Actionable</b>	There must be a clear connection between the metric and organizational activities.
<b>Relevant</b>	Each metric should directly relate to the organization’s stated purpose.
<b>Time-Bound</b>	KPUIs should be measured at regular intervals.
<b>Stakeholder-Inclusive</b>	Effective KPUIs consider the needs and impact on all stakeholders impacted by the Purpose.

## Navigating the Path to Purpose-Driven Performance Indicators

The journey toward Key Purpose Indicators (KPUIs) holds transformative potential, but it is not without challenges. Companies moving in this direction often encounter resistance—internally, where traditional performance metrics dominate, and externally, where some stakeholders may question the relevance of purpose metrics. Overcoming these obstacles requires persistence, adaptability, and a commitment to long-term impact.

The experiences of purpose-driven organizations reveal several key challenges and strategies.

### 1. Expanding Organizational Mindset: Profit-Driven AND Purpose-Driven

For decades, many businesses have been guided by the belief that profitability is the ultimate measure of success. Milton Friedman’s famous assertion that “the social responsibility of business is to increase its profits” has shaped corporate norms, making the shift toward purpose-driven performance indicators a fundamental reorientation. Purpose-driven metrics

require leadership committed to integrating purpose across all departments and activities—from product development to marketing.

At First United Bank, this shift was a multi-year process, including purpose workshops, purpose-aligned training, and a system that rewarded purpose-driven achievements. The result was an organization where purpose wasn't an afterthought but core to the business, continually reinforced through KPUIs.

## **2. Measuring the Intangible: Quantifying Qualitative Impact**

Purpose-driven metrics often aim to capture values like well-being, human potential, community connection, or personal growth—concepts that don't lend themselves easily to numbers. Traditional KPIs excel at quantifiable data, but Key Purpose Indicators demand new approaches like surveys and qualitative assessments to define “success” in these areas.

First United Bank partnered with Gallup to measure well-being comprehensively, integrating subjective, objective, and behavioral data to gain a true understanding of how individuals are engaging with each Spend Life Wisely pillar. This approach enables First United Bank to capture not just how people feel about their financial well-being, but also the actual state of their finances and the specific actions they are taking to improve them.

## **3. Building Trust in Purpose Metrics**

For purpose metrics to gain acceptance, especially in traditionally profit-focused industries, there must be a foundation of trust. First United Bank, for example, encountered initial skepticism from customers about why a bank would care about personal growth or health. The bank addressed this through transparency, explaining how data would be used, sharing stories of positive impact, and demonstrating dedication to its pillars of purpose. Customers, employees, and communities begin to see these metrics as proof of the company's integrity, enhancing loyalty and engagement.

## **4. Ensuring Purpose Metrics Are Actionable**

Purpose is meaningful only if it drives action. KPUIs must provide actionable insights that influence decision-making and resource allocation. This requires ongoing review and refinement to ensure KPUIs guide strategy in meaningful ways.

At First United Bank, Key Purpose Indicators highlight areas where the bank's impact is strongest and where more support is needed. Data on financial well-being, for instance, revealed a disparity between younger and older employees, allowing the bank to prioritize resources for younger staff. By aligning resources with these insights, companies turn purpose from an aspiration into concrete outcomes that benefit employees, customers, and communities.

## 5. Balancing Purpose with Performance

While purpose metrics are essential, financial health remains critical. Companies should combine purpose with traditional performance metrics, creating a model that benefits all stakeholders. This balance reflects the belief that purpose and profit are not mutually exclusive but interdependent and mutually reinforcing.

*“Performance without purpose isn’t meaningful, but purpose without performance isn’t possible.” – Grant Reid, former CEO of Mars*

By blending traditional KPIs with Key Purpose Indicators, companies can build a business model that is financially resilient and socially responsible. This dual approach allows organizations to thrive in a market that increasingly values companies with a genuine sense of purpose.

## Conclusion: Towards a New Era of Actualized Purpose

Key Purpose Indicators are a call to action for businesses ready to redefine success beyond traditional performance metrics. Purpose has become the new compass by which companies navigate solving the big problems facing our world, and KPUIs are the milestones guiding this journey. The future of business lies in embracing purpose as a core principle, not a secondary ambition. In a world hungry for meaning, purpose-driven organizations hold a unique power—and a responsibility to measure, track, and enhance their impact on the lives they touch.

The examples of Southwest Airlines, Walmart, Patagonia, and First United Bank show what’s possible when metrics align with Purpose. Purpose-driven performance indicators serve as both mirror and map, reflecting the core ambition and guiding companies toward meaningful impact. These metrics challenge us to reimagine business as a force for good, where profit fuels purpose and purpose enriches lives, leading to higher profits over time.

Developing Key Purpose Indicators is a commitment to a broader vision of impact—one that extends beyond immediate financial gains. They hold organizations accountable to their purpose, inspiring employees and customers who seek genuine connections to something greater than themselves. Though the journey from performance indicators to purpose indicators isn’t easy, it is a path rich with rewards: deeper engagement, stronger relationships, and the satisfaction of knowing that success is rooted in something meaningful.

*Numbers tell stories, but purpose gives those stories meaning. What story will your metrics tell?*

By embracing Key Purpose Indicators, companies signal their commitment to a future where success is measured not just by financial returns but by lives touched and communities strengthened. This bold vision captures the highest potential of business—not merely to create wealth but to foster life, not just to perform but to realize their purpose. The time has come to measure what truly matters, reshaping the legacy of business for generations to come.

## About the Authors

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Haley Rushing is the Chief Purposologist and co-founder of The Purpose Institute. She is co-author of Wall Street Journal Bestseller, *It's Not What You Sell, It's What You Stand For*; contributor, *Conscious Capitalism Field Guide*; and contributor, *Perspectives on Purpose: Leading Voices on Building Brands and Businesses for the Twenty-First Century*.

As Chief Purposologist, Haley has personally led the charge to discover and bring to life the values and purpose for some of the most purpose-driven organizations in the world: The American Red Cross, Southwest Airlines, Whole Foods Market, Interstate Batteries, IMG Academy, VF, John Deere, BMW, and many more. When she's not actively unearthing the deeper Purpose and core Values of her clients, she's passionate about doing her part to champion Conscious Capitalism.

A native of San Antonio, Texas, Haley holds a B.A. in cultural anthropology from the University of Pennsylvania and studied alternative dispute resolution at The Wharton School of Business. She resides in Austin, TX with her twin daughters (India & Ziggy).

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Raj has published sixteen books, including *Firms of Endearment: How World Class Companies Profit from Passion and Purpose*, which was named a top business book of 2007 by Amazon.com. His most recent books are *Awaken: The Journey to Purpose, Inner Peace & Healing*; *The Healing Organization: Awakening the Conscience of Business to Help Save the World* and *The Global Rule of Three: Competing with Conscious Strategy*. Raj has consulted with and taught at numerous companies, including AT&T, Verizon, LG, DPDHL, POSCO, Kraft Foods, Whole Foods Market, Tata, Tesoro, Siemens, Sprint, Volvo, IBM, Walmart, McDonalds and Southern California Edison.