



## The Vision Creation Process

As easy as it may sound, the vision statement creation process is specific, detailed, and vital to your organization. It must be done with the utmost care and attention...even if done quickly.

### Basics:

A vision statement is a word picture of how you see the organization in a projected time period (3, 5, 10 years, etc.) It is written in the present tense as a way to pull you into the reality of that future. The mission statement provides the focus for building the vision; which is therefore in alignment with the mission of the organization. The vision statement reflects what you want the organization to look like as you act in accordance with the mission statement day-by-day, week-by-week, etc.

The book *ENGAGE! Roadmap for Workforce-Driven Change in a Warp-speed World* covers other basics of vision statements such the balance between short and long term results. (See Chapter IX.)

A clear and shared vision statement:

1. Creates a solid foundation for identifying the best strategy for success
2. Is the basis for an organizational scorecard



3. Aligns organizational resources and helps organizational members make decisions about priorities (a critical success factor)
4. Marks important goals that can be celebrated when achieved

The creation of a vision statement can (like the mission statement) be a long, drawn out, and grueling process. It can also be so “pie in the sky” that no one really takes it seriously.

As in the mission statement process, we have gotten excellent results with a facilitated process that takes a couple of half-day meetings plus the wordsmithing and reality check with organizational members (which occur after the scorecard development). The vision creation process is very similar to the mission statement process with the addition of creating two versions, collecting both trend data and broad organizational member input, and doing a rigorous reality check.

#### Assumptions:

This vision creation process is based on these assumptions:

- Your vision team knows the organization well.
- The organizational leaders who are expected to actualize the vision are an integral part of creating the vision and the vision reality check.
- You have a good facilitator to move the process along. An involved and enthusiastic team can get mired in interesting and important, but off-track, discussions.
- There is respect for the balance between short and long term goals.
- The vision reflects the balance of financial, customer, learning and growth, internal business process, and community citizenship goals.
- The key decision-maker agrees to be an integral part of the wordsmithing process.



- All organizational members have an opportunity to give input to the vision statement.

Here is a process for creating a vision statement. If you already have a vision statement, you can use it as a starting place or ignore it completely until you have a new vision to compare it to.

## PART ONE—The Long Term Vision

We start with the long term vision to push thinking out in the future and hopefully to bypass perceived limitations. We call this the best of all possible outcome visions (or “wild ‘n crazy”).

An example of that was President John F. Kennedy’s 1961 message to Congress. Here is an excerpt of that message, “...we have never made the national decisions or marshaled the national resources required for such leadership. We have never specified long-range goals on an urgent time schedule, or managed our resources and our time so as to insure their fulfillment... I believe that this nation should commit itself to achieving the goal, before this decade is out, of landing a man on the Moon and returning him safely to the Earth.”

Here are the steps:

1. Notify the trend watchers (see page 92 in *ENGAGE!*) to be ready with the results of their findings.
2. Identify the vision team (20–40 people).
3. Ask the vision team to prepare, stating the purpose of the meeting: to create a vision that reflects what the organization looks like in the future (3 years, 5–10 years<sup>1</sup>) in the areas of financial results, customer results, internal business process results, learning and growth results, and community citizenship results. Ask them to get input from their key people and block out the required two half-days on their calendars.
4. Initiate the first meeting: Re-state the purpose of the meeting. Discuss the purpose of a vision statement, the key components,



and criteria of a good vision statement. Give examples of good vision statements and not so good vision statements.

5. Review the definitions (and distinctions) of mission, values, vision, strategy, scorecard.
6. Label five tables, one for each aspect of the vision: (financial, customer, internal business process, learning and growth, corporate citizenship). Ask people to self-select to those tables based on their passion, interest, expertise, experience, etc. Indicate that everyone will have opportunity to input on all of the aspects of vision. Ask them to discuss for 10–15 minutes the answer to the question: “In the best of all possible worlds, how do you envision our organization in relation to this area in 5–10 years?” Push them for the best possible picture—an ideal picture. This is where your team gets free rein to be creative. Ask that each group select someone to scribe the key points of their discussion on a flip chart.
7. Each table group then selects two people (“table owners”) who feel confident to represent the work of the group to others in the room. The table owners remain with their table. With the exception of the two table owners, group members then rotate to another table (in such a way that there is even distribution to all the tables.). Indicate to the table owners that the output of the process will be a list of vision elements in their respective table areas (i.e., finance, customer, etc.)
8. On each rotation, the table owners debrief the newcomers. After discussion they include newcomer perspectives. If there is great disagreement on any issues, the issues are noted as such. (This process takes about 10–15 min.)
9. Repeat rotations until all people have been to all tables.

Note: you are about 2 to 2.5 hours into the process by now

10. The table owners then debrief the entire group on the outcome of the process and their final list of vision elements. As appropriate, edit the elements that are strategies or measures,



or translate them into vision elements. E.g., the strategy “Open up the XYZ market” may translate to “our market share has increased by 30%.” (Note, in some cases, as in this one, it makes sense to combine the vision element with the related scorecard element.)

What you have now is a list of vision seeds. The next step is to refine this list to reflect the top priorities for the organization.

11. Each person votes on what they see as the two most critical vision elements in each category. Use the criteria of alignment with mission and feasibility<sup>2</sup> within the 5–10 year period. You can do this individually with voting dots (look for ¾” round color coding labels) or by using a matrix with mission alignment importance on one axis and feasibility within the time period on the other. (See examples of matrix in the Stakeholder Selection Matrix appendix.) Keep the original list of vision elements for reference in part two, and for future vision refinement efforts. From the voting process, determine the top 2–4 elements in each vision category.
12. Identify the vision statement wordsmith team. Their job is to take the work of the vision statement team and craft it into a vision that meets the vision statement criteria. The key decision maker is part of this team.
13. The vision statement wordsmith team agrees to meet for 1 hour to create the long term vision statement from the vision seeds
14. The output of that hour is sent to all the other team members for their comments, input, suggestions, etc.

## PART TWO—The Short Term Vision (3 years)

The short term vision is obviously based on the long term vision. The goal here is to look at the long term vision and determine what part of that should be carved out for achievement in 3 years. In many cases it



will be an exact repeat with the addition of the clarifying process. In some cases, there are immediate needs to incorporate into a short-term vision.

15. The vision team meets to determine what part of the long term vision the organization will commit to achieve in 3 years. For example, if part of the community citizenship vision is to become a Malcolm Baldrige National Quality Award winner, the 3 year vision may be to complete one application and have a list of changes needed for the next application.
16. Use the same process employed in creating the long-term vision to assign the 5 table groups. Each table group creates the three-year vision from the basic vision. For each element of the vision, they clarify what the terms mean. For example, if part of the customer vision is to earn the highest confidence of our customers, that sentiment clarified may read, “We have an 80% customer retention rate.” Here is where you will see that the clarifying process starts moving into scorecard elements. Tom Hutchinson of the University of Massachusetts called this “operationalizing fuzzy concepts.” The goal is that any one team member would have the same understanding of every vision element, i.e., ultimately a clear and shared vision.
17. Each table group debriefs the whole group and, after discussion, agrees on the three-year vision for each element.
18. The vision statement wordsmith team finalizes the vision statement.

Note: As I mentioned in Chapter IX, the vision, scorecard, and strategy are created and refined in an iterative way, rather than in a tight sequence. The reality check on the vision and the input from the organization will come after the scorecard process when the vision is even more clarified. After that point, it is a great idea to create a visual representation of the vision. This is a powerful reminder of the organization direction and key goals. (See *ENGAGE!* page 19 for an example: Farnam’s combination mission/vision map.)



For a useful article on vision, look at Jay Conger's "Dark Side of Leadership" in the autumn 1990 *Organizational Dynamics*, Vol. 19 Issue 2, p44. While the article addresses self-serving leadership, it also has excellent considerations and watch outs for creating a good vision.

1. Determine the time span for your long term vision.
2. Feasibility is translated as being a stretch, but doable