DEVELOPING A VISION STATEMENT

This tool is used to develop a vision statement – a clear picture of where the organization wants to be in the future. It helps leaders identify the vision "drivers" of the organization.

Hint: Use this tool in conjunction with "What is Vision?"

Definition

A vision statement gives people a clear picture of what the organization is aiming for in a finite period of time – typically ten years or less. It needs to be sufficiently visionary to sustain peoples' energies and dreams. It should be sufficiently concrete that it results in clarity, not confusion, about goals and objectives. The vision statement is always rooted in the organization's purpose and values.

The Process

Appoint members of a team to develop the vision statement. This should include the senior officers of the organization. Members of the planning team should complete the homework assignment on the following pages and discuss their results. The agenda below can be used to guide the planning meeting.

Agenda for Planning Meeting

A. Introduction: Review the agenda. Establish ground rules for the discussion.

B. Ask members of the planning team to share their answers to the first six questions of the homework assignment. As each question is discussed, probe for areas of agreement and disagreement. Highlight the key agreements and underlying differences, but don't try to resolve any conflicts until you complete every question.

C. Draft visions: Ask each person to work with another person (or by themselves if the group is small) to prepare a flip chart of their newspaper story. Ask them to include the headline and the key story elements. When they are done, ask each group to present their newspaper article to the larger team. Be sure to post them on a wall.

D. Metrics: Ask the group to share their metrics. Highlight the common elements.

E. Perceived conflicts: Ask people to share any perceived conflicts. Highlight areas of perceived conflict that are shared.

F. Have people work in groups of two to draft proposed vision statements. Share and discuss.

G. Decide on next steps. This may be further refinement by a smaller drafting team, or communication of the draft vision(s) to a wider group for feedback.

Homework Assignment

Please think about and answer (in writing) the following questions. Be prepared to share your answers and your thinking – i.e., how you derived your answers – with the planning team. Feel free to provide additional information or thinking. Don't feel constrained by the assignment. Rather, use it as a jumping off point.

The Questions

1. What are the essential ways in which the organization generates value? What is its business model? How do you think the business model will change during the next ten years?

2. How does the organization measure success today? How will the ways it measures success change?

3. What are your customer segments today? How do you think your customer segments will change during the next ten years?

4. How will the things that differentiate you from your competition change during the next ten years?

5. What other changes may have a significant impact on your future?

6. Based on your responses, what do you think will be the most important changes for your organization during the next ten years *within your control*?

7. What do you think will be the most important changes *outside your control?*

8. *What is your vision for the organization?* Within the realm of reality, imagine the best possible scenario for your organization in ten years. To help you articulate it, imagine you are reading a newspaper ten from now. A front-page story is covering the major successes that your organization has achieved. What does the story say? What does the headline read? What key milestones or achievements are cited in the story?

9. If you have ideas about how to measure success in achieving your vision, write them down here.

10. Your thinking may have triggered some concerns about conflicts between your proposed vision and the organization's current goals and direction. Please list any perceived conflicts.