

DEVELOPING A VISION STATEMENT

This tool is used to develop a vision statement – a clear picture of what the organization wants to ultimately achieve in the future.

Tip: You can use this tool in conjunction with another of our tools: “What is Vision?”

Definition

A vision statement is intended to convey what the organization ultimately wants to achieve in the future. Unlike a purpose statement, which reflects the present-day reality of what the company fundamentally does and why it exists, vision is future oriented.

The Process

The first step is to decide who will be responsible for developing the vision statement. Typically, the group includes the senior leaders 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. Who are your customers today? Who do you hope will ultimately be your customers?
2. What is your business today? In what ways do you hope your business will grow and evolve?
3. *What is your vision for the organization?* What do you hope the organization will ultimately accomplish? To help you articulate it, imagine you are reading a business story many years from now. It's describing the extraordinary successes that your organization has achieved. What does the story say? What does the headline read? What key achievements are cited in the story?