



## Toolkit Page 112 Create a Vision

### How to Create a Vision (or Compelling Goal) Statement

#### How a Vision Is Different From a Mission Statement

A mission statement tells what business you are in and what products and services you will offer. It is a clear statement of purpose. A mission statement may last for decades.

A vision transforms the organization. It provides a picture of what could be. It is a catalyst that can impel an organization to move toward that dream. As dreams come true or realities change, visions change. It is a goal of the highest order.

A vision statement *may* also indicate how the organization will act.

*When Johnson & Johnson learned that some containers of Tylenol had been contaminated, the portion of the company's credo "Our first responsibility is to the doctors, nurses, hospitals, mothers, and all others who use our products" demanded that they act promptly to protect people. They removed all Tylenol from the market until they were certain the product was safe. In contrast, when Intel had problems with the Pentium chip, they waffled, trying to put fingers in a dike while water gushed through.*

#### Why a Vision Is Important

A vision is a catalyst. In *Built to Last* (see **Resources** section), a comparison of visionary companies that have remained wildly successful over many decades, the authors found that most had BHAGs—Big Hairy Audacious Goals. These hairy and audacious goals focused the attention of people because they were so challenging.

*In 1952, 80 percent of Boeing's business came from one customer—the U.S. Air Force. U.S. and European airlines showed little interest in jets for commercial use. And they saw Boeing as a defense contractor. "They build great bombers. Period." Boeing still remembered downsizing from 51,000 to 7,500 at the end of World War II. And, it would take three times the average annual after-tax profit for the past five years just to develop a prototype. But, this is the BHAG they chose: to move headlong into commercial aviation. This BHAG transformed commercial aviation and Boeing far outpaced a major rival, Douglas Aircraft, in getting jets to market.*

A vision aligns people in activities that cut across the organization. A vision facilitates goal setting and planning.

*It helps people set priorities. The vision says, "This is what we stand for." A vision defines what you will do as well as what you will not do.*

*At Hewlett-Packard a product manager said, "We've got to introduce an IBM-compatible personal computer now." A lab manager asked, "But where's the technological contribution?" The senior manager replied, "But what if that's not what the customers want? . . . And what if the market window will close unless we act now?" The junior lab manager said, "Then we shouldn't be in that business. That's not who we are. We simply shouldn't be in markets that don't value technical contribution. That's just not what the Hewlett-Packard Company is all about."*

A vision unleashes energy.

*BHAGs excite people. In 1961, the most optimistic assessment of getting someone on the moon was at best 50-50. But Kennedy did not say, "Let's beef up the space program." He said, "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 Earth." Congress immediately allocated \$549 million and billions more over the next five years. The BHAG was a clear, extremely challenging focal point for NASA. Richard Feynman, who served on the panel investigating the Challenger disaster, believed that one reason for the miscommunication and poor quality that led to the explosion was that NASA no longer had a vision that united all parts of the agency.*

A vision is the embodiment of the organization's core beliefs.

*A vision provides focus for assessing individual, department, and organizational progress.*

## **A Vision Includes . . .**

Each vision is unique. If you create a good vision statement, it will apply only to your organization. It cannot be transferred to another industry.

*It reflects the core values of the organization.*

A vision shows how diverse parts of the organization are aligned in pursuit of common goals.

It often includes Big Hairy Audacious Goals.

A vision embraces paradox. As you begin thinking about creating a vision, you will find many issues seem to be "either/or" in nature. Either we go for low cost or we go for high quality. Either we invest for the future or we focus on short-term goals.

Good vision statements accept both sides of the paradox: We strive to achieve low costs and guarantee high quality. According to *Built to Last*, the visionary companies are adept at embracing both sides. They don't just look for balance — a little savings and a little quality. They look for ways to have it all: low costs and high quality. Managing these seemingly paradoxical issues is what gives life to visions.

*“The test of a first-rate intelligence is the ability to hold two opposed ideas in the mind at the same time, and still retain the ability to function.” - F. Scott Fitzgerald*

Visions can be short “we will have a man on the moon” or as long as a page or two. But, in either case, they must give a clear and compelling picture. There are no rules for creating visions.

## **The Pitfalls**

Visions are very popular and there is a danger in that. Lots of time is wasted preparing visions just because it seems like a good thing to do. It is extremely important to understand what can go wrong.

The vision is a “one size fits all” statement filled with nice-sounding platitudes.

*Contrast the visionary General Electric’s statement “To become #1 or #2 in every market we serve and revolutionize this company to have the speed and agility of a small enterprise” with the vision of the far-less-successful company, Westinghouse: “Total Quality . . . Market Leadership . . . Technology Driven . . . Global . . . Focused Growth . . . Diversified.” Who can argue with the terms of the Westinghouse vision, but what do they mean? And, more important, how could they possibly influence how a manager makes decisions? Note the clarity of GE’s word picture.*

It is undertaken as an exercise with no intent to use it to guide all planning and decision making.

This summary is drawn from a number of sources:

*Built to Last: Successful Habits of Visionary Companies.* James C. Collins and Jerry L. Porras.

“Some Thoughts About the Vision Thing.” Carole Napolitano. *Feedback*, Fall, 1991.

*Beyond the Wall of Resistance*, Rick Maurer.

Unpublished manuscripts and conversations with strategic planning consultant, Max

Stark, Euclid, Ohio. His thinking probably had the greatest impact on my own work with helping clients create vision statements.

## **How to Hold a Vision Meeting**

Determine who needs to be in the room for this meeting. You are looking for people who:

- have the best interests of the organization at heart.
- will challenge your thinking.
- bring a different perspective.

## *The Meeting*

### I. Introduction

- Introduce the players.
- Discuss the purpose of the meeting.

### II. Set the Stage

Hold a conversation that focuses on the question: Who is the customer for the vision? In other words, who is going to use the vision? How will it be used? Whatever you do, don't create a vision just because everyone else is. There must be a compelling reason for this activity or it will simply be a waste of time.

### III. Establish Mission and Purpose (optional)

If your organization does not have a clear mission statement, then you must begin with this activity. A mission statement is enduring. Think very long term, 20 to 100 years.

The mission statement should address:

- Who should we serve?
- What should they receive?
- What is the ultimate result we seek?

A mission statement should be relatively short (under 100 words, if possible). It must address the questions written above.

### IV. Create a First Draft Vision Statement

A vision statement is often a one- or two-page word picture of what you want to create. It is a story written in the present tense as if that envisioned reality were already occurring. There is no set formula for a vision statement.

You use your heart and gut as a guide. Does it inspire you? Will it focus your attention?

Here is a way to create a vision statement:

- A. Make sure everyone has writing materials. Ask people to sit quietly and relax. Note that “. . .” in the text below indicates pauses. Don’t rush this visualization process. People need time to settle in and explore images.
- B. Say: “For the next couple of minutes just sit quietly. Don’t write anything, just relax. Imagine the future — three to five years from now. Imagine your organization has become everything you’ve hoped for.” (Note: You may want to be a little more specific here. For example, if you have just merged with another organization, you might ask people to imagine the new organization.)

Continue: “Allow an image to come to mind. What does this ideal picture look like? Explore this image. . . . Who is in it? . . . What’s going on in the scene? . . . What makes it so ideal? . . . What are people saying? . . . What are they doing? . . . Now, let that image go. . . . Allow another image to come into view. Explore this image. . . . Who’s in it? . . . What’s going on? . . . Where are you in this scene? . . . What’s it feel like to work here? . . . Now, allow this image to fade. . . .”

- C. “For the next three minutes, jot down what you envisioned during this exercise. Please don’t talk during this exercise.” Allow time for writing.
- D. “Please sit quietly again and close your eyes. . . . Imagine that time in the future again. . . . A reporter from *The Wall Street Journal* is going to do a story on your organization. The reporter’s focus is on why you are the leader in the industry. What would you show the reporter as examples of things that make you particularly proud? . . . Be specific in your thinking and explore this image in some detail. . . . Perhaps the reporter is asking you questions. How would you respond? . . . Allow this image to fade. Please open your eyes.”
- E. “Take a couple of minutes to jot down the images that came to mind during this last visualization exercise.”

Note: Pick a publication that has meaning for your organization. It doesn't have to be *The Wall Street Journal*.

- F. Pairs talk about what they envisioned. “A” talks for 10 to 15 minutes, “B” finds out everything they can about what A envisioned. Switch roles. It is important to keep the attention on the speaker. When A is talking, B should be in listening mode —asking questions, clarifying, etc. B should not be giving his/her thoughts during this round. When you switch, A should follow the same guidelines.
- G. Give each pair ten index cards or large Post It notes. Ask them to pick ten items to put forward in the whole group. They should print their responses in large block letters; otherwise it may be difficult for others to read.
- H. In full group, ask for one card from one pair. Post it. Ask for one card from another group. Post it. Continue this process until all the cards are posted. Begin grouping the cards as you post them.

Note: prior to Step H, tear off two-inch pieces of masking tape. Place one of these on the back of each card when you are ready to post it.

## V. Determine Your Values

Discuss: In order to be successful, what values do we need to follow?

- What values are implied in our mission and vision statements?
- Which of these values are absolutely critical. Limit this list to a few items (five to seven).
- What would it look like if we were living by those values?
- What would it take for us to live by those values?

If your value statements can be transferred to another organization, then the work is not done. This is not a one-size-fits-all exercise. Also, be careful to not just list a bunch of tired platitudes. Think about the values it will take to make this vision a reality.

## VI. Dilemmas

Identify the unsolvable issues. For example, you will never solve the issue of keeping quality high and costs low. This is a dilemma that will need to be managed, not a problem that can be solved and forgotten. One way to identify the dilemmas is to ask: What feels like it can't be resolved today?

## VII. The Final Statement

Ask someone who is a good writer to collect all the comments and write a first draft statement. Do not attempt to write the vision statement in the full group. You'll die young. Writing, editing, and wordsmithing in a group is tedious and a waste of time.

© **2010 Rick Maurer**. Rick uses his Change without Migraines™ to advise organizations on how to lead change effectively. He is author of many books including *Beyond the Wall of Resistance*. In 2009, he created the Change Management Open Source Project, a free resource for people interested in change in organizations. You can access the open source project as well as many free articles and tools from his web site: [www.rickmaurer.com](http://www.rickmaurer.com)

This article is from my book, *Building Capacity for Change Sourcebook* (Maurer & Associates 2000) which is now out of print.