



Visioning

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A guide to create a clear vision and desired future state.

In this guide, we will cover:

- [Why Vision Statements Matter](#)
- [7 Point Checklist for a Great Vision Statement](#)
- [Questions Everyone Asks](#)
- [Visioning Canvas to Build Your Future State](#)

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Introduction

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Visions Matter

Visioning is all about creating the future. As we always say to our clients, there is **no reason to embark on a planning process, of any sort, if there is not a desire that the future is different than today.**

A strategic plan without a future state is like building a bridge to nowhere. Great leaders communicate [and overcommunicate] about where an organization is going and why. Plain and simple – you cannot be a great leader without a vision, destination, or future that is truly compelling. It's no easy walk in the park – developing a vision is a tough process often riddled with anxiety.

We're here to help you make the process rewarding, fun and impactful. Use this guide to build a great vision, evaluate if you "got it right," and avoid common sticking points.

7 Point Checklist for a Great Vision Statement

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What Makes a Great Vision?

So, what makes a great vision? We've worked with thousands of clients to develop compelling, forward-thinking vision statements. Here is what we use to build a new vision or evaluate a current statement, paragraph or manifesto.

Boldly Points to a Destination

State your vision in the future tense. Period. It's confusing to use the philosophical approach of the present tense to project a vision because, somehow, that evokes subconsciously visualizing the future now. (Even explaining that was confusing!) There is enough debate around the difference between mission and vision (see below) to trust us on this one.

A strong, future-looking vision statement compellingly completes the sentence: "We envision..."

It Paints a Clear Picture of Success

Ultimately, a vision is the ideal future state of an organization - a place that you envision as successful as possible given your purpose, current state and desired impact. Think of painting a comprehensive picture of success from the following dimensions:

- 1. Customer Growth & Retention**
- 2. Operational Excellence & Innovation**
- 3. People & Organizational Stability**
- 4. Financial Results & Impact**

□ It Explains *Why*

It can't be said enough - everyone wants to know what they are working towards and why. The why is so, so important. It's also arguably the hardest part of a visioning exercise.

Unpack your why by answering the question "What is the LASTING IMPACT our organization will make for our employees, customers, stakeholders and the communities we serve. WHY does that matter?"

For this piece, consider not answering the "why" so broadly that it could be the answer for any organization. Your "why" needs to be authentic to what your organization really impacts. (If you are stuck here, check out the master of "why" Simon Sinek!)

□ Aspirational and Achievable

Growing an organization is hard work. It's mission critical that you, and everyone on your team, is excited about where the organization is going. Your vision needs to inspire by balancing two parts "aspiration" and one part "achievability." Your team needs to be stretched and also simultaneously believe the future state is possible to achieve.

You know your vision is both aspirational and achievable when you see your team starts self-motivating around the next steps.

□ Precise, Yet Detailed

Visions need to be precise, clear, and as detailed as possible. We often like to make the analogy that you want your vision and direction to be clear like a Rockwell painting, not soft and out-of-focus like a Monet. A vision of success can't be painted in vague brush strokes.

That said, it's nearly impossible to be precise and detailed. Your way out of that conundrum is to develop a one-line vision statement and build out a "vision description" that unpacks each phrase of the vision statement. This allows you to create something memorable (see the next point) but also dig in deep to each area. Sometimes the vision description is a series of bullet points and sometimes full paragraphs - like a manifesto.

A great vision statement allows people to clearly see the future in fine precision. Can you see it?

□ Memorable

Great leaders and leadership teams can easily communicate the vision in less than 3 minutes - consistently. Because everyone is oversaturated with information, cutting through the noise requires impactful words that are memorable and relevant to your team. **Pro tip: To develop a memorable vision, don't wordsmith by committee, but rather leave that to the best writer in the group.**

Your vision is memorable when others on the team start repeating it.

□ Pause. Reflect. Refine.

The magic of great visions is that they sustain over time. They sustain until they are achieved, or something dramatically changes to require a shift. To succeed in developing a vision that will be that powerful, it's important to allow for cycles of reflection and refinement. Also, consider sharing the draft vision and allow refinement through staff input (not in the intent, but how it is communicated). Great organizations are not built in a single offsite, and neither are great visions!

***You have the courage and conviction
to lead your team in the future you've envisioned!***

Questions Everyone Asks

03

FAQs

Does it have to be called a vision?

No. In fact, call it whatever you want as long as everyone understands what the destination is. Particularly in government agencies, visions often sound like repeats of missions and it's helpful to call the statement "Future State" or "Strategic Direction."

Should the vision be 5 or 10 or 20 years in the future?

With all of the conversation around strategic planning being archaic (we agree), the biggest knock is that the world is changing so fast you can't possibly plan long term. And that is of course true. However, it's important to separate having a clear destination from building a ridged path to get there.

The archaic part is "over planning" mid-term actions that will definitely change as soon as you save the plan. What is not archaic is having a destination far enough in the future to stretch your organization. Long-term is very situational depending on your industry and market. We believe that the destination is what matters, not being dogmatic about how far out is far enough. Trust your gut - pick what feels right.

What is the difference between a mission and a vision?

Simply put - mission statements answer why an organization exists and vision statements answer where an organization is going. Sometimes you can forgo a vision statement in a classic sense, if and only if, your mission

statement is very bold and you have a few long-term, very directional goals.

A recent example is Patagonia's new mission statement: "We are in business to save the home planet." In combination with some very clear goals, you can see how these planning elements together paint the picture of the future state. That said, it is rare to see this, which is why a vision statement is so important.

What is the difference between a vision and a BHAG?

A BHAG (big, hairy, audacious goal) is just that - a goal. BHAGs are awesome when it comes to aligning teams around a single, normally short- to mid-term objective. We love BHAGs! But BHAGS are not visions because they don't create a longer-term trajectory that is compelling and purposeful. Also, they don't normally bring in all aspects of an organization because they are so focused (on purpose). Finally, visions are about rallying an organization to make a lasting impact.

What happens if I (and my team) really don't know where we are going?

Honestly, one of the hardest parts of being a leader is having the courage and conviction to pick a destination for an entire organization. We've worked with many leadership teams over the years that have had similar issues, so you are in good company! While having a vision is critical, forcing it is insincere and foolhardy.

First, use the vision canvas exercise with your team to see if you can gain some clarity. If that does not yield satisfactory results, settle on a "near-term" objective (like a BHAG) that gives your team a direction while you continue to work on uncovering where you want to go and why.

Visioning Canvas

03

Using the Visioning Canvas

The Vision Canvas can be used as a worksheet, a journal entry or a structure for a whiteboard. You can use it individually or with your team. Whatever your preference, the idea is to brainstorm thoughts about each section. Use the brainstormed ideas to craft the vision and the vision description/manifesto.

You must answer these two questions!

For each perspective, you must answer these two key questions:

- 1. What does success look like?**
- 2. What is different than today?**

Complete the Visioning Canvas

In the visioning canvas, work through each section and answer the questions for each corresponding section.

- 1. Organization & People Stability**
What does success look like from a people perspective?
(Think org structure, size, capabilities, skills, culture.)
- 2. Operational Excellence & Innovation**
What does success look like operationally?
(Think facilities, processes, technology, innovations, environmentally.)

3. Customer Growth & Retention

What does success look like from a people perspective?
(Think number, volume, types, geographies, products/services, new value proposition)

4. Financial Results & Impact

What does success look like from a financial and social impact perspective?
(Think revenue growth, profitability, community/social impact.)

Creating Your Core Vision Statement

In the center of the Visioning Canvas, answer the following questions to help create your core Vision Statement.

1. By... (Insert Year)

By when do you want to accomplish your vision?

2. We envision...

What is the LASTING IMPACT our organization will have for our employees, customers, stakeholders and the communities we serve?

3. We envision...

And why does it matter?

Finalizing Your Vision Statement

Once you've completed the exercise, you will definitely want to engage a writer (on your staff) to develop the final product. We don't recommend workshoping the final wording of your vision as a group, but rather with a writer and a small group of people (1-2 individuals).

Visioning Canvas

Org Name:

Date:

In each perspective, answer these two questions:

1. What does success look like?
2. What is different than today?

1

People & Org. Stability

(Think org structure, size, capabilities, skills, culture)

4

Financial Results & Impact

(Think revenue growth, profitability, community/social impact.)

3

Customer Growth & Retention

(Think number, volume, types, geographies, products/services, new value proposition)

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By _____
INSERT YEAR

We Envision...

What is the LASTING IMPACT our organization will have?

Because...

And why does it matter?

2

Operational Excellence & Innovation

(Think facilities, processes, technology, innovations, environmentally)



We build and review thousands of strategic plans every year. We'd love to review and provide you feedback on your vision statement.

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