

# Chat Transcript from September 1, 2022 Session

## Big, Bold Vision with Meg and Tony

08:18:08 From Jomy to Everyone:

Thank you. Glad to hear about the Food Bank. It's close to my heart as I volunteered for Mary's Meals here in Europe - a very similar initiative.

08:18:34 From Lindsay to Everyone:

Proud to be here with you Meg as a fellow Food Banker in San Francisco!

008:19:24 From Westlee to Everyone:

Lindsay and Meg, it is great to be among Food Bankers! Here from the Regional Food Bank of Oklahoma.

08:20:14 From Cristine to Hosts and panelists:

I think a defn of vision would be helpful. I see Bright Path's vision as a mission.

08:22:09 From Jurrie to Hosts and panelists:

never be afraid to formulate a bold vision (that might feel intimidating, which limits your mindset/thinking going forward)

08:22:41 From Kristina to Everyone:

communication and also having the teams communicate back is critical....

008:23:11 From Neil to Everyone:

I often struggle with the distinction in the terminology that Meg just stated.

08:24:41 From Jurrie to Hosts and panelists:

"The biggest trap in communication is thinking it happened..."

08:26:08 From Philip to Everyone:

While we are on this topic, I'll often also see "Purpose Statements" in addition to Mission and Vision. How does this group think about the differentiation or function of a "Purpose Statement."

08:27:00 From Jurrie to Hosts and panelists:

For me, a VISION, is the way how you look at the world, your market, your idea about the thing you are doing. This can be something that only you see..

08:27:09 From Jeffrey to Everyone:

Mission defines purpose; Vision extends your mission to an ideal future state; Values drive how you might work...

08:27:27 From Jurrie to Hosts and panelists:

a MISSION is your place you want to reach, within this vision you have and look at reality

08:27:30 From Bernabas to Hosts and panelists:

Vision statement should have a statement of niche, and competitive dimension. Explain where we want to be in a way we are challenged to stretch out and create maximum impact

The mission >> the how to achieve the vision

08:27:51 From Amit to Everyone:

For a large conglomerate, does every business vertical/corporate entity within it need to have its own vision and mission?

08:27:53 From Jason to Everyone:

+1 on Guiding Principles. We adopted several as well. They transcend SOs and goals, but are too granular for mission and vision

08:28:09 From Cristine to Everyone:

Vision - desired future state (N star); Mission - repeated actions to achieve your vision (source: Drs. Laura and Derek Cabrera)

08:28:25 From Anthony to Everyone:

do we think that the vision statement for a company or organization that is undergoing a turnaround or reorganization should have different attributes? I would like to think that in many turn around ..inspirational is key

08:29:12 From Jomy to Everyone:

But don't you think the mission should sound like something that hasn't been achieved yet. is in progress of being achieved ok too?

08:29:58 From Lindsay to Everyone:

Guiding principles have been so impactful for us - they give staff a simple tethering point, every day, to why the "how" of our work matters as they drive towards OKRs

08:31:34 From Jeffrey to Everyone:

I'd think that Mission is foundational -purpose driven, Vision - aspirational - yet to achieve - future state.

08:32:23 From Amit to Everyone:

The leaders in the organisations have to live and breathe the vision in the day to day for it to be authentic and for the team to buy into it

08:33:02 From taffy to Everyone:

If you go to where the work is being done, you can actually point out to front line staff how they are supporting the vision. It creates ownership to some extent.

08:33:55 From Bryan to Hosts and panelists:

VERY important

08:34:20 From taffy to Everyone:

They should each have one, because it helps connect those staff to the overall vision.

08:34:30 From Bryan to Hosts and panelists:

Exactly as Taffy says

08:34:46 From Sisi to Everyone:

Sense of belonging/purpose and meaningful of their individual tasks.

08:36:54 From Cristine to Everyone:

We advocate "vision at all levels" - a shared purpose where each workgroup has connected their work to the vision.

08:37:58 From Patrice to Hosts and panelists:

As someone who leads an international org with independent offices around the world, I wholeheartedly agree with Erica.

08:38:45 From KISUKE to Everyone:

In facilitating both buy in and contribution of units and departments to the overall vision we have used functional analysis at each department/unit level to define hw each will contribute to the overall vision, and then based on the functions review analysis revise job descriptions so individual job holder sees and appreciates how their role contributes to the company/organization vision

08:39:03 From Kristina to Everyone:

We have teams working to build their mission, vision around our larger one so they can own the tie back and the story telling. Also as we continue to rollout OkRs ensuring they are running through the questions. we work to have the teams to have their own so it drives innovation and also can open discussion if things don't look aligned on face value and it is in that discussion flow that the entire organization gets better

08:39:40 From KISUKE to Everyone:

What Meg is describing is what we use as a process for functions analysis/revie

08:40:00 From Bryan to Hosts and panelists:

Meg's right. "Trade-offs" are the sign of a good strategic process.

08:40:23 From Patrice to Hosts and panelists:

That is so good

08:40:30 From Amit to Everyone:

Meg has hit the nail on the head. Moving away and walking away from the businesses, solutions that aren't giving great payoffs means dismantling set structures

08:40:36 From Neil to Everyone:

Listening to Tony and Meg it's easy to see the heart, soul and art that went in to crafting their vision, mission, etc. I think that's a skill that brings "words" to life. Very impactful

08:41:05 From Ahmed to Everyone:

any one in Somalia?

08:41:15 From Larry to Everyone:

To Meg's point, when we have had discussion on Invest/Maintain/Sunset - we have found defining what we mean by "maintain" has been really important

08:41:27 From Jim to Everyone:

I encourage teams to have their own vision and mission but, when they create them, I ensure that they are aware of the corporate vision & mission, to ensure that any divisional visions & missions work in support of the overall company direction

08:44:12 From Subasen to Everyone:

vision centered cultural ambassadors

## Poll: Global Market Factors Impacting Your Strategy

08:45:48 From Steven to Everyone:

Retaining talent

08:46:03 From Bryan to Hosts and panelists:

Other = Organisational Leadership

08:46:07 From Jim to Everyone:

also retaining talent

08:46:12 From Chris to Everyone:

finding and retaining staff

08:46:20 From Larry to Everyone:

Retaining talent - linking purpose

08:46:27 From Zac to Everyone:

Economic mobility and workforce development

08:46:30 From Linna to Everyone:

retaining talent and technology integration

08:46:31 From Don to Everyone:

war and talent

08:46:31 From Rory to Everyone:

retaining staff too

08:46:33 From Jennifer to Everyone:

Other: retaining talent

08:46:45 From Steven to Everyone:

The age of "and" - not or. Work from home AND Hybrid work AND on campus.

08:46:54 From Tamara to Everyone:

Other- Reprioritizing strategies based on decreased funding, particularly for NP's dependent upon fundraising. People are not giving as much

08:46:55 From Anthony to Everyone:

other..cost of financing expansion

08:46:55 From Cathy to Everyone:

renew and rebuilding the workforce that is exhausted after responding to the pandemic; focus is on local government staf

08:47:09 From Bernabas to Hosts and panelists:

Retaining talent

08:47:15 From KISUKE to Everyone:

Disruption, recovery and continuity and its effects on strategy in the next 20-28 months

## Master class – Vision Canvas

08:48:27 From Raphael to Everyone:

Sort of balanced score card approach?

08:48:49 From TPS Meeting to Everyone:

STRATEGIC MAP

08:48:54 From Erica Olsen to Everyone:

Sort of a balanced scorecard - but more really balanced

08:49:48 From Cristine to Hosts and panelists:

Any chance you have a Vision Canvas for public sector?

08:50:54 From Ameen to Everyone:

How to do that ?

08:50:55 From Erica Olsen to Everyone:

Also, you could pick your own "framework". Just an idea being robust and comprehensive

08:51:33 From Jurrie to Hosts and panelists:

An interesting experiment for a conversation starter is to ask a company leadership team to create this as a draft without discussing their point of view with others, and after that ask them to present it to the others and in the end discuss the results

08:52:34 From Danielle to Everyone:

That's so good!

08:53:27 From Anthony to Everyone:

hi jeff do you have any ideas how to evaluate the thinking of team prior to sessions??

08:53:34 From Frank to Everyone:

Any tips on how you ensure the conversation stays at the strategic level? I can see where the team may get caught in the weeds.

08:53:36 From Jim to Everyone:

The juxtaposition between current state and future state reminds me of Peter Senge's thinking

08:53:49 From Raphael to Everyone:

Will this deck be made available after the call?

08:55:06 From Patrice to Everyone:

Awesome, thank u so much.

08:55:23 From Raphael to Everyone:



08:56:11 From Amit to Everyone:

Should we add a dash of quick market intelligence /external market scan as prerequisite as those insights can really influence where would we stand and how would we differentiate?

08:57:31 From Bryan to Everyone:

Segmentation?

08:58:07 From Bernabas to Hosts and panelists:

Do you think we should aim for a vision that is timeless or one that is relevant???

08:58:33 From Tommy to Everyone:

excellent visioning canvas, please forward to us

08:58:56 From Akram to Hosts and panelists:

To which level should we be transparent during the planning workshop at each managerial level? Some strategic directions may not be in favor of certain companies/subsidiaries.

In another word: who should be in the room?

08:59:47 From KISUKE to Everyone:

The model is very useful in simplicity and thank you for describing the process on how to deliver on it. I appreciate your sharing and insights.

09:00:04 From Jodi to Everyone:

what size team does this work with? My Leadership Team is quite large

## Your takeaways

09:01:18 From Jodi to Everyone:

Visioning Canvas

09:01:22 From Regeanie to Everyone:

The Visioning Canvas

09:01:24 From Cristine to Everyone:

Vision Canvas

09:01:26 From Frank to Everyone:

Yes! The vision canvas.

09:01:27 From Tommy to Everyone:

utilize the visioning canvas approach

09:01:30 From Westlee to Everyone:

The Vision Canvas!

09:01:31 From taffy to Everyone:

Vision Canvas

09:01:32 From Jillene to Everyone:

Visioning Canvas

09:01:32 From Tim to Everyone:

Vision Canvas

09:01:34 From Onesmus to Everyone:

vision cavas

09:01:35 From Lindsay to Everyone:

Communicating strategy as org transformation

09:01:35 From Rory to Everyone:

The Visioning Canvas is something I can use - thank you so much!

09:01:36 From Trent to Everyone:

Vision Canvas! Spot on!

09:01:36 From Joseph to Everyone:

Communicating the vision constantly

09:01:36 From Kay to Everyone:

Visioning Campus and 80% is good enough!

09:01:38 From Jim to Everyone:

The vision canvas is superb

09:01:39 From Gabriele to Everyone:

Vision canvas

09:01:43 From Akram to Hosts and panelists:

Vision canvas

09:01:44 From Sameer to Everyone:

breaking down vision setting exercise into 4 perspectives

09:01:45 From Neil I to Everyone:

Vision canvas!

09:01:53 From taffy to Everyone:

Thank you all so much!

09:01:55 From Cynthia to Everyone:

Make sure your vision speaks to everyone.

09:01:55 From Tim to Everyone:

Communication Communication Communicaton

09:02:02 From Sisi to Everyone:

Thank you so much! sharing with great panels with their big bold visions, so inspiration

09:02:02 From Michael to Everyone:

visioning canvas and directionally accurate rather than perfection

09:02:03 From Tamara to Everyone:

I like the idea of a vision canvas

09:02:04 From Jim to Everyone:

Also, made me realize that my advice is sound :-)

09:02:08 From Bernabas to Hosts and panelists:

Clarity of vision

09:02:09 From Nikolai to Everyone:

80% is good enough, talk about the vision all the time.

09:02:09 From Nicolas to Hosts and panelists:

Add the four BSC perspectives to build the company's vision

09:02:10 From Zac to Everyone:

the 4 perspectives of the visioning canvas

09:02:11 From Ameen to Everyone:

Don't look for perfection

09:02:13 From Anthony to Everyone:

vision canvas and to get bold the teams' minds have to be bold

09:02:18 From Ahmed to Everyone:

Living it, breathing it, talking about it every day

09:02:18 From Amit to Everyone:

Vision Canvas demystifies vision building. Thanks a ton, OnStrategy Team. Great initiative! Congratulations.

09:02:20 From Carlos to Everyone:

Directionally good

09:02:24 From Lumun to Hosts and panelists:

What I got out of this is the vision canvas and linking the vision to a change that we want to see

09:02:24 From KISUKE to Everyone:

I will attempt to innovate based on the model in my next Strategy design process.

09:02:36 From Don to Everyone:

The practical aspect of the vision by Tony and Meg.

09:02:37 From Debra to Everyone:

excellent presentation. from South Africa

009:03:07 From Don to Everyone:

Good start--keep it up!



## Q&A

09:06:16 From Jodi to Everyone:

or maybe per business unit could work

09:06:22 From Amit to Everyone:

I had the opportunity to lead the Strategy Offsite for my leadership team in April. We had the Business Heads + the next line leaders (max 20 members in a room)

09:07:49 From Bernabas to Hosts and panelists:

I am having a group where client has insisted on bringing 50 people! What is best way to lead such a group for impact

09:09:03 From Amit to Everyone:

We followed up and communicated the output using "Strategy on a Page" to the entire organization so that every team member knows the org strategy and can articulate it. We invited feedback on how they thought they could be part of the implementation

09:11:28 From Jodi to Everyone:

Anthony Chang, it will take time. I would suggest you keep at it through individual conversations and reiterating every leadership and team meeting that you have

09:12:04 From Jodi- to Everyone:

and seek co-ownership. Get people involved in developing the bold vision so that they believe in it and buy into it

09:13:07 From Jodi to Everyone:

culture plays a role as well. If your company or national culture is one that is hesitant to change, you may need to be ok that it will take a much longer time.

09:14:56 From Anthony to Everyone:

thanks

09:15:15 From Bernabas to Hosts and panelists:

Thanks

09:15:53 From Lumun to Hosts and panelists:

What advice will you give to a start up to develop its vision by the founders?

09:19:27 From taffy to Everyone:

People have to remember that they are not just going through the steps either. If you ask for someone's opinion or suggestion you need to hear them.

09:20:13 From taffy to Everyone:

You also need to remember for those ideas that are not taken further down the line, those folks will experience a sort of loss, show them how they f