



CSO *Master class*

Building a Big, Bold Vision

Visioning Canvas

In each perspective, answer these two questions

1 What does success look like?

2 How is that different from today?

1

People & Org. Stability

Think org. structure, size, capabilities, skills, and culture.

4

Financial Results & Impact

Think revenue growth, profitability, social impact.

3

Customer Growth+Retention

Think org. structure, size, capabilities, skills, and culture.

5

By _____
INSERT YEAR

We envision...

Because...

2

Ops. Excellence & Innovation

Think facilities, processes, technology, innovations, and environmental impact.

Big, Bold Visions

Getting Started

01

Get your team ready to envision the future.

Prompt Future Thinking

Pre-reading of future-facing articles, Ted Talks, etc.

02

Set Up Your Visioning Space

Physical whiteboards, virtual whiteboards, flip charts, PPT.

03

Generate Raw Material (Voices of Your Org.)

Run a Staff Survey.

Leadership Team (Core Planning) add thoughts to Vision Canvas.



Spend 20-30 mins per perspective...

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By _____
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We envision... What is the lasting impact our organization will have?

Because... And why does that matter?

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Big, Bold Visions

Ideating Your Envisioned Future

01

Build a picture of the future everyone can see.

Brainstorm Each Perspective

What does success look like?
What's different from today?

02

Theme Big Ideas for Each Perspective

Highlight main themes that resonate strongest with the team.

03

Summarize Direction for Each Perspective

1st Sentence – Success looks like...
2nd Sentence – What's different than today is...



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Big, Bold Visions

Casting Your Big, Bold Vision

01

Establish your “North Star” that is clear, directional and impactful!

Complete “We envision...”

What lasting impact will we have? What dent will we make in the world? What will be our legacy? Why does it matter?!?

02

Capture Themes and Unique Ideas

Focus on strategic intent and get it directionally correct.

03

Take the Final Statement Offline

Assign an individual or a team to wordsmith and draft final recommendations.



80% is good enough.

Don't expect to land on the final words.

Visioning Canvas

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People & Org. Stability

Think org. structure, size, capabilities, skills, and culture.

What does success look like?

More transparency into global operations. A connected organization bound by a common culture, inspired to foster personal, team, and organizational excellence.

How is it different from today?

Currently understaffed given our current revenue and future growth objectives. The organization is vulnerable to key risk due to lack of redundancies in the organization structure.

4

Financial Results & Impact

Think revenue growth, profitability, social impact.

What does success look like?

In the next five years we will have tripled our revenues to \$200M and increased profitability by 20%.

How is it different from today?

We're cash flow positive with healthy profitability margins and no longer require additional capital to fund operations.

3

Customer Growth+Retention

Think org. structure, size, capabilities, skills, and culture.

What does success look like?

Expand core portfolio to include energy transmission to provide best in class user experience and reliability through a cohesively designed product ecosystem.

How is it different from today?

While initial testing/pilot projects and early market introduction is promising, tightly managed programs, investment requirements, product dev., and of competitive pricing models.

5

By **2030**
INSERT YEAR

We envision...

Because...

We envision a world where everyone has access to clean, reliable energy.

2

Ops. Excellence & Innovation

Think facilities, processes, technology, innovations, and environmental impact.

What does success look like?

Operational excellence to be characterized by tools, systems, and processes that scale rapidly and are repeatable. Process flows are streamlined to further improve efficiency.

How is it different from today?

We are a scrappy start-up. Many processes and systems are rudimentary in nature, require a high-level of human input to execute and data is often siloed within subject matter experts.

Must-Remember Tips

Dos 👍

Lead with a vision and talk about it ALL THE TIME.

Focus on the intent, staff engagement and clarity.

Make your vision part of your organization's day-to-day.

In making strategic decisions ask: "does this decision/choice support our vision?"

Save the Vision Canvas.

Don'ts ❌

Stress about creating a mind-blowing vision statement.

Don't make it sound like any of your competitors could also say it.

Don't make it all about yourself – what's in it for the people you serve?

CSO Collaborative Programming Calendar!



Big, Bold Vision

Deep Dive: Creating a Bold Vision

1st Thursday @ 8 a.m. PT
September 1, 2022

Workshop: Strategies & Responses to Major Market Dynamics

3rd Thursday @ 8 a.m. PT
September 15, 2022



Growth Frameworks

Deep Dive: Building an Adaptable Growth Framework

1st Thursday @ 8 a.m. PT
October 6, 2022

Workshop: Sales & Marketing Strategies to Fuel your Growth

3rd Thursday @ 8 a.m. PT
October 20, 2022



OKRs

Deep Dive: Are your OKRs masquerading as strategy?

1st Thursday @ 8 a.m. PT
November 3, 2022

Workshop: How to do OKRs if you are not Google?

3rd Thursday @ 8 a.m. PT
November 17, 2022

CSO Collaborative

Final thoughts



See you Thursday, Sept. 15 @ 8 a.m. PST

We'll connect again on Thursday, Sept. 15 at 8 a.m. PST. Be sure to reserve time on your calendars if you haven't already.



Expect today's content in your inbox

We'll email by tomorrow with links to resources we talked about.



Suggestion for topics? Feedback?

Drop us a line anytime – let us know what you think and what you'd like to tackle as a group.

collaborative@onstrategyhq.com