

Developing a Shared Vision

**“Make no little plans; they have no magic to stir men's blood
and probably will themselves not be realized.
Make big plans; aim high in hope and work, remembering
that a noble, logical diagram once recorded will not die.”**
– Daniel Burnham, American urban planner and architect

Organizations and the people who work in them and direct them know what the organization is all about and what to do, right?

Think about it and the answer should be, many times, “Wrong!”

Immediate, day-to-day tasks and needed actions are often obvious. However, the longer-term goal and key decisions and more complex set of actions needed today and the direction to take to reach whatever the future goal is for the organization are not so obvious, especially when looking further into the future. The problem of “where to go” can be magnified when new people join the organization or the board and they do not share whatever the understanding might be of the “goal” that may already exist in the organization.

The result can be that the organization floats aimlessly like a sailboat without wind or a powerboat without fuel, or even goes off-course under the power of “decisions not made” or made without the needed direction firmly in mind. In this circumstance, the actions of the leader and others in the organization are more random and less focused, and the organization is inefficient.

The outcome is the organization loses its way, either in small ways that add up to sub-maximization and poor results, or in large ways that lead to hitting the rocks and failure.

What's needed is an inspiring, compelling shared vision of what the future success of the organization can bring that all organizational participants share and by which they are guided.

The shared vision of the organization's desired future, combined with the current reality of the organization, is essential for developing effective strategies and action steps and is at the base of the Fast Track Strategic Planning System®.

A shared vision will offer a benchmark against which to judge the appropriateness of an on-going infinity of possible actions – implement one of many possible technologies, raise capital, downsize, invest in a new methodology, open an office, merge, introduce a product, abandon a market, launch an advertising campaign, focus on data security, give funds to a good cause, outsource, buy a competitor, etc., etc., etc.

A shared vision not only will drive and guide the organization, but it will increase the effectiveness of the organization in terms of productivity and more efficient decision making. The organization will be a more inspiring and fun place to work when a compelling future is being strived for.

The shared vision statement should be:

- **Short and to the point.** Everyone in the organization should be able to describe it in a few compelling words; otherwise, it will not guide what happens after its adoption.
- **Broad and encompassing** of the organization (unless the intent of the statement is for the organization to abandon a significant part of its current reality, which certainly might be the case in a shared vision statement).
- **Descriptive of the endpoint of a reasonable strategic planning timeframe**, typically at a five-year time horizon.
- **A statement of shared aspirations** for the organization, not a listing of how the vision will be achieved. It should be a statement of “the ends, not the means.” The balance of the planning process and its execution by inspired employees will show the road to the future vision.
- **Inspirational and therefore motivational** to those in the organization. It should paint a compelling picture of success that excites people and connects them with the organization in an emotional way.
- **Not dropped on the organization by the leader.** The shared vision needs to truly come from the organization, or at least key participants who will be critical in its achievement. It needs to foster shared understanding and commitment from those called to make it a reality in the future.
- **Developed through participation.** Only through sharing and consensus building, in which the participants are solicited for their ideas and are listened to, will people buy in and commit to the vision and its achievement.
- **Not an end in itself.** A dry statement forced from a group can, in fact, be anti-inspirational. The end goals should be a vision that people buy into, hold in their minds, can see and feel, and aspire to achieve because of its power, effect and reward (not necessarily personal reward, perhaps more importantly how it will change reality and affect others in positive, transformational ways).

- **Positive**, not what is “not wanted.” People are motivated by positive pictures, not by negatives. Avoid negative visions, which will encourage “avoidance” rather than creative risk taking.

A Japanese-developed planning approach, Hoshin Kanri planning, offers insight on the power of shared vision as the basis for strategic action. According to *Wikipedia*, “In Japanese, *hoshin* means shining metal, compass, or pointing the direction, *kanri* means management or control. The name suggests how hoshin planning aligns an organization toward accomplishing a single goal.” Think of the shared vision as a compass that all members of the organization can refer to and steer by to keep the organization going to desired direction and to reach the desired goal.

“The practice of shared vision involves the skills of unearthing shared ‘pictures of the future’ that foster genuine commitment and enrolment rather than compliance. In mastering this discipline, leaders learn the counter-productiveness of trying to dictate a vision, no matter how heartfelt.”

- Peter Senge, The Fifth Discipline

Start the visioning process by asking, “What is and more importantly will be the essence of the business five years from now if we are extraordinarily successful?”

Ask the participants to look five years ahead and imagine the best “stretch” outcome that could be in store for them and especially for the organization.

Engage the participants by asking, “What are your aspirations for the success of the organization – who/what is changed, how will it change and what are the results?”

The participants should be inspired to think in terms of making something “big” happen, an outcome that will change things fundamentally, that will create something brand new and unique.

Ask the key question, “If the organization is “the best it can be,” what will it look like and be doing in five years?”

Done properly with good facilitation, the ideas will flow. These ideas should not be limited or cut off – they should be encouraged. The process to be used is brainstorming, where initially no idea is wrong or bad. The more ideas and “visions” or spins on “visions,” the better. Don’t worry if they are achievable or change the essence or direction of the organization. That’s the

point – maybe the organization is better changing. In any case, people will be energized by the discussion and the outcome.

The important ultimate outcome is not whether the vision is achieved, but that people are inspired, hope rises, the vision is pursued and the impact on the organization is great, and a better, more worthwhile organization results for the participants, other employees and stakeholders, and society. Isn't that the outcome you want?

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“Mash it up” – Put all the ideas together and look for commonalities/areas of agreement.

The group should group debate the differences between all the competing visions put forth and sort them based on measurements including:

- Significant or insignificant.
- “Big result” or “small result.”
- Fundamental or “nice to achieve.”
- Strategic or operational.
- Etc.

“As people talk, the vision grows clearer. As it gets clearer, enthusiasm for its benefits grow.”

- Peter Senge, The Fifth Discipline

Don't vote, seek consensus.

The idea is for the process to meld a powerful, transformational common vision and build understanding, respect and commitment along the way.

Once the vision is adopted, it allows strategies to be created and pursued to move the organization to the vision. That's the essence of gap planning and the bedrock on which the Fast Track Strategic Planning System[®] is built. The shared vision will enable the organization to quickly evolve and change in positive ways and for employees and other stakeholders to gain ownership and passion around the organization and what it is becoming.

Once a truly compelling shared vision is in place, each segment, department, subsidiary and individual associated with the organization can align with the vision by creating a subset of the shared vision that they can pursue to do their part in achieving the envisioned great future.

Also, it is important to realize that the shared vision will need to change over time as the current reality and the environment in which the organization operates change. That's the reason why planning is never done and needs to be periodically revisited, as the Fast Track Strategic Planning System[®] recognizes.

Most important, of course, is knowing the vision is not the end, it is the beginning. Following the setting out of a compelling shared vision must be the development and pursuit of strategies and action steps for its achievement.

**"Vision without action achieves nothing.
Action without vision just passes the time.
Vision with action can change the world."**

- Nelson Mandela