



Creating a Vision Statement Facilitator Instructions

The facilitator can introduce the Vision Statement exercise by making the following points.

A Vision Statement is a:

- Short
- Public Declaration
- About what you want to be able to say is true (about the organization)
- At a future point in time

Examples from other Businesses

Vision 2022 (Example)

We will be the global leader in _____. Our team will deliver unsurpassed services that deliver value to our customers while meeting the needs of our shareholders.

Vision 2023 (Example)

With our dedicated team of professionals, we will be the recognized national leader, providing customized customer experiences, creating breakthroughs in innovation and delivering results for our shareholders.

A Vision Statement is a Touchstone for Decision-Making.

In early times before the advent of currencies, touchstones were smooth dark pieces of rock, which when gold was rubbed on it, left a distinctive mark. This was the difference between making a fair trade or being taken.

We should think of our Vision Statement as a touchstone for decision-making.

We should continuously ask ourselves; by taking this action will it move us closer or farther away from where we want to be?

Facilitator's Instructions

Explain that it is very important that everybody takes the time to draft a statement that is 30 words or less. Explain that you will give people about 5 minutes to work on a draft.

Explain that when we have heard everybody's Vision Statement, there will be a balloting process. The rules will require that people can get two votes for the vision statements they think best approximate the requirements of a good vision.

The rules will indicate that they can vote for themselves only once.

Ask people to take the time to quietly craft a statement. Once you believe that people have completed it, follow this procedure.

1. Ask each person to read their statement out aloud twice.
2. Handout pieces of paper to each participant and tell them they will write up to two names of people with the most promising Vision Statements.
3. Go through the process once again, only this time each person will read their statement once and everyone will complete their ballots.
4. Collect the ballots and table the results.
5. Announce the winning person. Then put their Vision Statement on a flip chart with large lettering.
6. Explain to the group that while there has been a winning Vision Statement it is by no means a final product. It will be necessary for the group to work together to make improvements until everybody is satisfied that, “we have an excellent Vision Statement”. Indicate that, “we are unlikely to end up with a statement resembling the one we start with”.
7. To prompt discussion, ask people: “What do they like about the statement? What they do not like about the statement? What is missing from the statement?” It is extremely important that the process be continued, even during periods of frustration, until the entire group is satisfied with the product. This could take 40 mins to 2 hours, or more.
8. When you believe that you have reached a consensus, go around the table and individually ask people whether or not they can be excited about this statement.
9. When there is contention still arising from people’s “final comments” you need to resolve these as a group.
10. Do not fall prey to the occasional skepticism about doing the Vision Statement. Considerable frustration can be expected to develop. It is important that the group understands that everyone must stay with the process because significant breakthroughs often occur at this stage.
11. When there has been a consensus reached on a final Vision Statement, indicate to the group that this is a major victory – an important step on the way to creating a strategic direction for the organization.
12. Post the final Vision Statement on the wall.



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