

*This is the 2nd article of 5 in the Visioning Toolkit series.
You can download the articles in this series, and other tools, at:
atctools.org/resources/tools-for-transformation*

Whatever the nature and scale of your organization, team or project, there are some best practices in visioning that apply to almost any situation. The following story illustrates some of these practices.

I was hired to do strategic planning by the Executive Director of a Progressive think tank doing research and advocacy around issues of economic justice. Before planning a retreat, I interviewed staff. It's good that I did so, because I discovered real confusion around the fundamental direction of the organization. All of the staff in the research department felt that the heart of the organization was in advocacy and believed that their contribution was less valued. Strangely, most of the staff engaged in advocacy felt the opposite – that the priority of the organization was research – and they were unsure of the organization's commitment to advocacy.

The ED was dumbfounded when I brought her these results. Showing me their annual report, she said, "Look at our mission statement. The whole point of our organization is the synergy between research and advocacy! Do these people really work here?" Overcoming some initial reluctance, I convinced her that we needed to align around vision before we started strategic planning.

We began the retreat with an exercise in which people shared personal stories about why they do this work. People came out of the process feeling more connected to their own sense of purpose, and more connected to the organization and its potential.

To learn more about this exercise, see our tool: *Appreciative Inquiry Process*

This was followed by a visioning exercise. Energy filled the room as mixed teams from advocacy and research worked hard creating an imaginary New York Times Magazine cover story 10 years in the future, celebrating the success and impact of the organization.

To learn more about this exercise, see our tool: *Magazine Article Process*

The four teams then proudly presented their stories. Each story highlighted the unique contributions and synergy of research and advocacy in impacting economic policy. The groups were so pumped up that they demanded to rewrite the mission statement. A small group of writers was still working feverishly when I went to bed. The next morning the group proudly unveiled the new mission statement, and in a surprisingly meaningful ritual, everyone signed it on a large, hand-decorated mural.

If you put their 'new' mission statement next to the existing one, the variances were nuances – not substantive. But the real difference was that every person

in the room, whether doing research, advocacy, development or administration, now personally felt ownership of and commitment to the vision.

We see in this story some best practices in visioning:

1. Seek maximum engagement
2. Engage the heart
3. Focus on alignment
4. Avoid the rabbit hole of wordsmithing

1. Seek maximum engagement

In many organizations, the vision is merely words on a document that have no meaningful impact on the daily life of those who work there.

The remedy: to engage as many key stakeholders as possible in the visioning process so people have a personal investment.

This is easier to accomplish in smaller organizations where it's possible for everyone to sit in a room together and work things out.

In larger organizations, we usually need to create a cascading process of engagement. A smaller group initiates the visioning process, followed by a series of opportunities for others in the organization to respond and give input. The mechanics of this will vary depending on the nature and size of the organization. But, the best practice remains the same: for the vision to really take hold there must be meaningful engagement with all the people whose commitment will be needed to implement the vision.

Here's a story about birthing a new vision in a massive organization. It may offer some perspective on this notion of cascading engagement.

In the 1980s, I helped lead a comprehensive revisioning process at one of the largest U.S. banks, which was failing to adapt its culture to meet the surge in competition from overseas banking. We began working intensively with the top 20 executives. They had no experience of being a team, and alignment was extremely challenging as the different divisions and their leaders had a history of considerable autonomy and internal competition. (The leader in charge of their thousands of local banks wouldn't aggressively promote their own Mastercards due to competition with the leader who ran the credit card division.) After considerable struggle, confrontation, breakdown and finally a breakthrough, the top leaders were able to draft a new vision for the bank. For the very first time, they committed to something greater than their individual agendas.

Taking our advice, they realized that unless the 130 Senior Vice Presidents were fully on board, this vision wouldn't change anything. So in a 4-day retreat, the SVPs tore it apart and put it back together. My consulting team then led a series of 3-day retreats for 4000 Vice Presidents on five continents to refine the vision. It was an iterative process. Increasing elements of the vision began being set in place, but over the next six months, meaningful changes were still made to the original vision. The final step: over the next two years, all 40,000 staff around the world – from managers to back-room check processors – participated in

transformational retreats to engage with the vision. At this stage it was more about how the vision was to be implemented. This included some very progressive policy changes, including stock for all employees and managers' bonuses being impacted by 360° Assessment surveys showing the degree to which their employees felt they were living the new values. At the end of this multi-year process, most of the 40,000 people of the bank felt some degree of connection to and ownership of the vision.

Not all engagement processes are so large or complex, but the principles remain the same at any scale. Here are a few tips on cascading engagement in visioning with organizations too large to all sit and talk together.

- Usually some leadership body takes the first steps in drafting the vision. This may consist of senior management and, depending on the situation, possibly some highly engaged Board members.
- It is advisable to:
 - include some representatives of staff, and/or
 - do interviews or surveys of staff prior to launching the visioning process, so the perspectives of staff are present in the room as leaders deliberate.
- Make clear what's on or off the table at each stage of engagement. In other words, when seeking input on the vision, it's important that people know what's open for discussion and what's already been settled. The failure to make this clear in advance is a recipe for frustration, disengagement and resistance.
- In large organizations, not all staff and other stakeholders may get the opportunity to directly impact the basics of the vision. But, there are still meaningful opportunities to engage with the visioning process due to many important questions about *how* the vision is to be implemented and the implications of the vision for every aspect of organizational life. These critical questions are best addressed by the people who have to live with the answers.

2. Engage the Heart

The tangible product of visioning is usually a written vision statement. But, as the story about the think tank shows, it's not only the words that are important. It's about passion and what makes people feel they want to go the extra mile. It's about energy. It's about people saying, "I'm all in." It's about people coming together in a deeply felt experience of collective intent and commitment.

The ideas are also important. We are laying down tracks for people to follow for years to come, and the distinctions we make matter. But, visioning deals with such deep human concerns as purpose and values. It needs to be an emotional as well as intellectual experience. We want to create space for the expression of people's deepest aspirations, as well as their frustrations and fears.

When people are struggling over particular language, it's often because the words represent deeply held feelings. Disagreements around vision often can't be resolved unless the deeper concerns are surfaced and addressed.

A community organizing group was shifting from working only on local issues, to a greater focus on state-wide work. They were making adjustments to the existing

Mission statement. The ED was pushing for the statement to be as short as possible, having read that this is considered ideal. However, there were strong objections to his proposal to take out the words “for our community.” This was not about wordsmithing and could never be resolved by a conversation around length of the Mission statement. The struggle reflected a lack of full agreement from some long-time staff around the new focus on state work and a lack of trust that the ED was as committed as his predecessor to serving the local community.

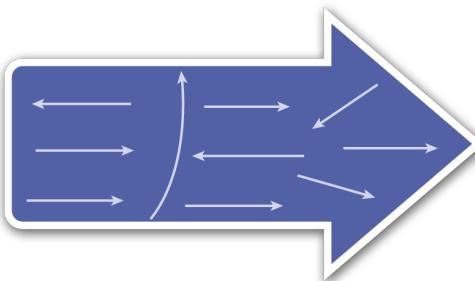
In visioning, we want to use methods, such as story-telling, and non-cognitive processes, such as art, music, poetry and drama, to engage the heart as well as the minds of those co-dreaming a future. Some groups mark the completion of visioning by creating a ritual of signing the vision.

3. Focus on alignment

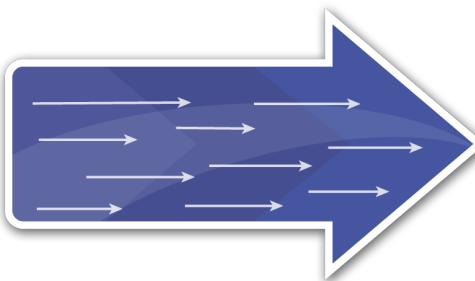
“Building a visionary company requires 1% vision and 99% alignment.”
– Collins & Porras, *Built to Last*

A primary purpose of visioning is to harness the energies of divergent stakeholders into a coherent, focused and powerful stream of collective will.

From this:



To this:



We call this alignment, and it is a key practice in visioning.

Mission, Vision and Values are meaningful to the extent that people in the organization:

- share a similar understanding of what the words mean
- actually agree

- understand the implications for the work they do every day

Too often, visioning fails to fully meet one or more of these criteria. Here are a few tips in facilitating alignment:

- **Take time**

Despite good intentions, it's easy for people to walk away from having created a Mission or Vision statement with quite different understandings of what the words actually mean. Visioning is one of those processes that shouldn't be rushed. And while a retreat setting can be helpful in creating the focus and energy needed for visioning, it's advisable to let the work 'marinate' post-retreat then return after a break to reassess.

- **Test for understanding**

Unpack key words. Have people dig into what they really mean. An excellent exercise is to have each person stand before a small group and pretend they're communicating the vision to others who have not been part of the visioning. The group then gives the speaker feedback about their presentation. It's a great process for accelerating group learning and alignment.

For instructions on facilitating this process, see our tool: *Vision Stands*

- **Surface differences**

It is critical to surface any substantive differences around Mission, Vision or Values. There can be a tendency in visioning to avoid or paper-over potentially disruptive differences, especially as the potential consequences of irreconcilable differences in visioning are threatening. Staff may be especially hesitant to share concerns if leaders seem set on a particular path. Group pressure may discourage potentially important dialogues. Skillful facilitation may be needed to ensure people feel safe to raise concerns. Staff may sometimes need to discuss the vision without top leaders being present.

- **Resolve differences**

Too often groups try to deal with differences by including more and more ideas and words in an attempt to make everyone happy, and in the process watering down the meaning and power of the Mission, Vision and Values statements. For example, people may try to deal with having too many different values by stringing values together with conjunctions to avoid having to make a choice. Resist this! Lean into differences in visioning and deal with them – even when it's uncomfortable to do so. The purpose of visioning is to focus organizational energy, and this requires prioritizing and making clear choices.

- **Explore the implications**

Alignment is a dynamic process that requires not only understanding the new direction but demands that each team member grapple with the personal implications of the change. What will I actually have to do differently to bring this vision into being? We can't actually be fully committed and aligned to the vision unless we are prepared to implement it.

4. Avoid the rabbit hole of wordsmithing

The wording of Mission, Vision and Values statements is important. For years to come, these words need to serve as a guide for the organization, its strategic choices, and the actions of the people who work there. But, one of the most frustrating experiences of visioning is when groups of people get bogged down over nuances in wording. When the group starts to go down the rabbit hole of wordsmithing, either surface whatever concerns or disagreements lie behind the discussion of particular words or delegate resolving the exact wording to a few people.

Groups can do many things well. Writing is not one of them. The U.S. Declaration of Independence is a remarkable document. While the Continental Congress appointed a 5-person writing committee and everyone signed off on the final document, most of the work was actually done by one person – Thomas Jefferson.

Once there is basic convergence in the group, empower a few people with some skill in writing and passion for the task to do the wordsmithing. Let them take it to the next level, bringing it back to the larger group for feedback and, eventually, approval.

Shorter is better for all elements of visioning:

- A brief and powerful Mission statement...
that everyone can easily memorize.
- Enough detail in the Vision statement to bring the future to life...
but try to keep it to one paragraph.
- Hopefully, no more than 5 Core Values...
and no cheating by stringing values together.

The next three articles in this series are a guide to facilitating each of the components of visioning:

Visioning Toolkit #3: Facilitating Mission

Visioning Toolkit #4: Facilitating Vision

Visioning Toolkit #5: Facilitating Values