Visioning: The Concept, Trilogy, and Process

Creating a vision is the key to organizational success.

**by
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WHY SHOULD YOU CREATE A VISION? For years, researchers have closely studied successful people to identify common characteristics that contribute to success. While they haven't been able to identify specific common characteristics, they have found that many successful people "were able to picture themselves, vividly, having already attained their goals, and they retained that image in their minds constantly, assuring themselves again and again that they knew they would succeed." [1] Organizations are no different. One of four common characteristics of Malcolm Baldrige National Quality Award winners is that all had a vision of what quality was and how they would achieve it. [2]

Walt Disney always recognized the power of a vision. Paul Murphy of the American Productivity and Quality Center tells a story about the power of this vision. [3] His son was chosen to be a part of the Disney World summer program, which is a program that hires college students and provides them with training in the way the Disney World theme park does business. Once while at the park, Murphy's son saw a woman who looked upset, and, even though it was his day off, he immediately walked over and talked with her until, a few minutes later, she smiled. When Murphy asked his son why he had approached the woman, his son said, "She looked unhappy, so I went over to see how I could help. If she walks around the park with a frown, soon everyone will be frowning, and we can't have that because this is 'the happiest place on earth.'" When Murphy asked his son where he had heard that, he responded, "They teach it to us in classes held to acquaint us with Walt Disney's vision." When Murphy commented that Disney was dead, his son replied, "Not here he isn't." And he was right. Disney's vision is alive, and that is why Disney theme parks are the first-class operations that they are. While there is no procedure that instructs employees to go help someone who is unhappy, they are guided by the picture in their minds of a Disney park being "the happiest place on earth," and they simply do what is necessary to make that a reality.

A vision is the essential element in organizational success. It provides direction and drives everything that is done in an organization. Without a vision, an organization is like a ship without a rudder. All types of organizations have difficulty bridging the gap between vision theory and an actual vision. The visioning concept, vision trilogy, and the eight-step visioning process bridge that gap so a vision can be any organization's key to success.

The visioning concept

A vision is a picture in your mind of the ideal or utopian organization, life, marriage, and so on. Visioning, a right-brain activity, is creating a full-color, detailed movie in your imagination that you can recall with the proper stimulus. A vision, like a dream, is vivid; you can see, taste, smell, hear, and feel it. With the proper stimulus, visioning, or visualizing, is not a difficult process. Actually, people visualize all the time; they call it daydreaming or fantasizing. For an organization with many diverse

Figure 1. Mission vs. Vision

Mission Statement	Vision Statement
Today	Tomorrow
Identifies the customer(s)	Inspirational
Identifies the critical process(es)	Provides clear decision-making criteria
Level of performance	Timeless

members, however, developing a common vision can be difficult, and the degree of difficulty is directly proportional to the number of members.

Vision vs. mission

Although often used interchangeably, mission and vision statements are distinctly different, and each has its own purpose, style, criteria, and components. As shown in Figure 1, a mission is for today's goals and the vision is for tomorrow's goals. The mission statement identifies an organization's customers and critical processes, often with a qualifier of what level of performance the organization is dedicated to delivering. The mission consists of those things that the organization concentrates on daily to survive.

A vision statement, on the other hand, is a long-range prospect or state of being that is worked on every day but will not be accomplished in the near future. The vision is that perfect state that might never be reached, but which you never stop trying to achieve. The mission-vision relationship is analogous to your personal life, in which you can categorize daily efforts into those that you do to survive today, such as going to work or fixing the car, and those that you do to prepare for tomorrow, such as attending school to obtain a graduate degree or taking on a special project to prepare for higher responsibilities.

For a vision to be successful, it must empower. Empowerment is a combination of motivation to act, authority to do the job, and the enablement to get it done. Enablement requires a vivid picture of the destination.

Criteria of visions

Successful visions fulfill three criteria: They are timeless, inspirational, and provide clear guidelines for decision making.[4] A vision is far-reaching; it describes a utopian place where everything is perfect. You might never arrive at your vision, but arriving isn't the important part; it's trying to get there and continually improving that matters. The progressive realization of the vision is critical to success. Inspiration is the force behind the motivation to act, and action toward the vision is what ultimately makes the vision a reality.

A clear, common picture of the desired end provides criteria for decision making. This picture enables and empowers employees at all levels of the organization. The need for cumbersome organizational policy manuals is reduced because the vision becomes a flexible guide to decisions. Tim Frye of Motorola, Inc. once remarked that he used the company's vision

of six-sigma quality along with its fundamental objective of total customer satisfaction as a guide when faced with difficult decisions in gray areas not covered by company policy.[5] It is impossible for a policy manual to address every situation an employee might encounter, but the picture of six-sigma capability and a totally satisfied customer enabled Frye to make sound, timely decisions that were responsive to the customer's needs. This responsive customer focus supports Motorola's overall desire to be the finest company in the world.

The vision trilogy

As shown in Figure 2, the vision trilogy consists of culture, people, and product or service. The trilogy, coupled with the criteria needed for a vision, creates a complete, vivid mental picture of the desired end.

The culture of an organization is simply the way it does business. "Stories, myths, and analogies convey the organization's shared values or culture. The stronger the culture and the more it is directed toward the marketplace, the less need for policy manuals, organizational charts, procedures, and rules. The people way down the line know what they are supposed to do because of a handful of guiding values that are crystal clear."[6] Values, norms, and shared experiences make up the overall picture of how a group does business.[7]

The people component of the vision trilogy is the selfish, or what's-in-it-for-me, part. This most often is the personal and professional growth and development that benefit the individual and, in turn, the organization. Thus, calling this the selfish component is inaccurate because it actually creates a win-win situation and, perhaps more important, it stimulates the desired visual picture. It is important to treat employees like they are No. 1 so they'll treat the customer in the same way. Including this element not only makes employees feel valued, it also helps them buy into the vision more readily and with greater commitment.

The product or service component of the vision trilogy is the ultimate reason why the organization exists. This component isn't limited to products and services; it often extends to the organization's role in the environment and society because, increasingly, maximizing shareholder value isn't the only reason for conducting business.

Visionary goals

Visionary goals should be used to provide clear decision-making criteria. Visionary goals are more specific, subject-oriented statements that complement the shorter inspirational vision statement. For example, an office of the Bureau of Indian Affairs uses visionary goals to provide clarity to its concise, overarching, single-sentence vision statement (see Figure 3). Some organizations forgo the shorter statement, and their visionary goals become their vision.

The visioning process

The visioning process is designed to provide structure to the seemingly structureless concept of creating a vision. The eight steps of this process are: collect input, brainstorm, shrink the mess, develop a rough draft, refine the statements, test the criteria, obtain organization approval or modify, and communicate and celebrate. An affinity diagram can be used to facilitate the first few steps.[8] Collecting input and brainstorming produces many ideas, and an affinity diagram helps group the numerous ideas into their natural relationships or affinities. This grouping

Figure 2. Components of the Vision Trilogy

	Values
Culture	Norms
	Shared experiences
	Selfish component
People	What's in it for me?
Product or service	Why customers keep you in business
	The higher calling

Figure 3. Bureau of Indian Affairs, Alaska Native Claims Settlement Act Projects Office Vision

Vision: Returning traditional lands to native hands by exploiting the past for Alaska's future

People	Culture	Product or Service
Promoting personal and professional development, innovation, and challenge	Encouraging teamwork, excellence, continuous improvement, and a sense of adventure	Exceeding expectations with consistently high-quality products and services

allows you to consolidate, eliminate, and choose the word or words that best represent each group as a whole. These representative words can then be written on Post-it notes and the notes arranged to form complete ideas or visions. But first you need to solicit input from the organization.

Step 1: Collect input

The vision, to be most effective, should represent the ideals of the entire organization. Creation of the vision can be done most successfully with a representative group of five to seven people. With fewer than five people, energy and ideas are reduced; with more than seven people, the law of diminishing returns applies. The more people you add, the longer consensus takes. To avoid having too many people, solicit input from people outside the team by using a survey. Ask people to answer the following questions (the first three questions relate to the vision trilogy, and the fourth question is designed to open up ideas beyond the trilogy):

1. What would be the perfect organizational culture?
2. What would the perfect organization do for its members' growth and development?
3. What products or services would the perfect organization provide to customers and the community?
4. What else would the perfect organization do or be?

After gathering input you're ready for the first visioning session.

Step 2: Brainstorm

Brainstorming is an effective way of producing many ideas. But even the best sessions slow down occasionally. To help spur the group through slow periods, interject a surveyed employee's input until all ideas are on the board. To stimulate right-brained thinking rather than the left-brained thinking that is normally used in analytical situations, ask the group the same questions that are found in the survey. These questions will encourage visualization and will help the group develop a vivid picture of the perfect organization. Ask them to imagine this perfect organization: What is it doing for its employees and customers? What are its norms and values?

Step 3: Shrink the mess

Next, you must shrink the large number of ideas generated down to a smaller, more manageable number without losing content. The first step is to look for and eliminate duplication. You can then categorize the individual ideas into groups. Since

there are no set categories in this process, the team's unique ideas will dictate. Next, eliminate any ideas that you decide aren't appropriate or don't fit. With the ideas grouped, choose the word or words that best represent each group and transfer them to Post-it notes.

Step 4: Develop a rough draft

Take the Post-it notes and arrange them on a clean flipchart page. By working with them, you can rough out a statement for each component: culture, people, and product or service.

Step 5: Refine the statements

With a fresh look, you're ready to carefully refine your statements. This is the rewrite step in which both content and style are important. Words are very important here, and only the right words will do because they must create a vivid mental picture. Therefore, this step deserves considerable time and energy.

Step 6: Test the criteria

Before taking the vision to the organization for approval, you can save time by testing the proposed vision against the criteria discussed earlier. Is your vision timeless, inspirational, and does it provide decision-making criteria for employees faced with tough situations? If it passes this test, you're ready to take it to the organization for approval. If it fails the test, you now have an area to work on. Be sure to stay focused and work on improving only those parts of the vision that don't meet the criteria.

Step 7: Obtain organization approval or modify

After the group has produced what it thinks is the perfect vision, present it to the entire organization for approval. This step is essential if everyone is to own, and thus commit to, the vision. When soliciting the approval of other employees in the organization, explain the process the team went through, explain the vision, and be open to modifications. All suggestions should at least be considered.

Step 8: Communicate and celebrate

Sometimes a vision will stand alone. If yours does, go out and celebrate. Usually the vision will require some explanation, clarification, and application. Every word, however, should have a purpose.

What makes a vision the key to success is that it drives an organization's goals and objectives, which, in turn, direct all

plans and activities to a specific end, enabling the organization to maintain constancy of purpose.[9] A vision without a plan, however, is only a dream. Stephen Covey proposed that everything is created twice: first in the mind, then in the physical world.[10] To create your vision in the physical world, you need a well-thought-out, flexible strategic plan to guide your efforts. Fortunately, there are similar models and techniques to facilitate that process as well.

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