Kickoff Meeting
Building a Vision
for Our future

Building conversations around what we seek to create together

Ross A. Wirth, Ph.D.
www.enTarga.com

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Issue that is addressed

• General feeling across the organization that we are drifting without specific strategies
  – We lack Vision and clarity of our Mission

• Problem compounded by . . . .
  – Employees waiting for clear direction that often doesn’t come
  – . . .
  – . . .
Our Opportunity

• Disrupt the cycle of waiting for direction
• Instead
  – “Manage to the Mission and Vision”
    • Clarify Understanding & Commitment to mission-vision
    • Fine-tune as necessary for organizational changes

• Our Task
  – Build Shared Vision and clarify Mission
    • Grassroots approach with line-of-sight for everyone
Team Charter

Charter

• Develop a mission and vision statement that is accepted and understood by nearly all employees

• Facilitates the effort to build grassroots vision
• This team will
  – Clarify their personal vision of the company
  – Collectively pool their knowledge of the organization and work with local business units
  – Actively facilitate the process in their local area while coordinating with the larger team effort
  – Percolate results up, down, and across the organization
    • Dialogue toward alignment & commitment to the final documents
  – Craft the stories that will carry the cultural message
Mission & Vision

• Mission
  – The ultimate purpose that explains why the organization exists
• Vision – what we see ourselves becoming
  – Vision moves outside the usual assumptions to yield a forward-looking view of the organization. Ownership develops through developing the means to make the vision reality.
  – Vision is not a destination, but an intangible structure that surrounds us and guides our daily activities. From this perspective, a shared vision identifies what we are trying to become and helps bridge the gap from the present to the future.

• In the absence of explicit and direct controls, it is the mission and vision that provides a line-of-sight that an employee uses in guiding daily work activities
Approach for Path Forward

• Start with Change Agents across the organization (this Team)
  – Bring knowledge of the organization history & values
  – Bring personal passion for improvement
  – Heavily weighted toward those seen as future leaders

Objective

Energize the Grassroots toward commitment (not just compliance)
  – Establishes foundation for a high performance culture
Critical Elements for Deliverable

• Sufficiently broad
  – the “essence” of the company
• Exciting – provides a team focus
• Contains sufficient guidance for required action
• Seen as doable, but a worthy challenge
• Words are focused, but understandable
• Success is evident through objective measurements
• Provides a basis for line-of-sight to daily work
  – Linkage between lower level missions & visions
    employee ↔ department ↔ business unit ↔ overall company
Sample Mission
Sample Vision
## Visioning Timeline

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<tr>
<th>Month 1</th>
<th>Month 2</th>
<th>Month 3</th>
<th>Month 4</th>
<th>Month 5</th>
<th>Month 6</th>
<th>later</th>
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<tbody>
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<td>Identify Visioning Team members</td>
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<td>Personal Visioning</td>
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<td>Involve grassroots thru networking</td>
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<td>Initiate employee communication</td>
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<td>Search for Commonalities - local</td>
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<td>Bubble up &amp; trickle down</td>
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<td>Seeding Conversations</td>
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<td>Craft supporting stories</td>
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<td>Summarize &amp; wrap up</td>
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<td>Assessment &amp; gap closure (later)</td>
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**Objective:** Sufficient structure to enable managing to the mission & vision
- All bi-directionally aligned with commitment at all levels
- Seamless line-of-sight from the top to all employees
Identify additional members of Visioning Team

• Who is missing?

• Cross-organization representation
• Team players – active leaders : active followers
• Passionate about our success – want improvement
  – Seen as Change Agents by others
• Seen as future leaders by their peers
• High potential – high performers
  – Ideal development opportunity for team members
• Active networkers in the informal organization
• Capable of blending ideas & motivating others
• Many just outside the power structure
  – Close to the grassroots yet capable of upward communication
Group Exercise

• Group exercise – Who is Missing?
Break
Action Plan for moving forward

The remaining slides detail the action plan for building alignment to a common mission and a shared vision that provides line-of-sight to daily work activities.
Personal Visioning

• Start personal visioning process
  – Understanding personal values
    • Individual exercise: “Personal Values Checklist”
  – Articulating your personal mission
    • Individual exercise: “Justifying your paycheck”
  – Building shared vision requires personal reflection 1st
    • Individual exercise: “Discovering your Personal Vision”
  – Link personal vision to the organization’s potential
    • Individual exercise: “Organization Possibilities (if I could)”
Involve Grassroots

• Network down below the Visioning Team
  – Involve others through local dialogue
  – Share personal visions
  – Encourage others to develop their own mission & vision statements

• Employee communication
  – Formalize the communication that is occurring informally above
  – Seek volunteers to the effort
    • Build a local network below the Visioning Team
Search for Commonalities

• Compare personal statements at the local level
• Through dialogue, craft consensus statements
  – Becomes somewhat more general, yet still provides context for lower level mission & vision
  – Identify stories that illustrate key points
• The result is an initial hierarchy of mission & vision statements at the grassroots
  – Not finished, but an organic start
  – The statements will continue to evolve as the dialogue process moves everyone toward alignment
Bubble up & Trickle Down

• Review 1st pass statements across the local organization involving all employees
  – “Why are we an essential part of our success?”
  – “How might we be exemplary in fulfilling this mission?”

• Move 1st pass statements to the Visioning Team
  – Dialogue & search for Commonalities
  – Repeat above process, but at a higher level

• Pass higher level statements back down
  – Not to replace lower level mission & vision statements
    • Search for alignment & revise as necessary

• Evaluate statements across organization interfaces
  – Cross functional alignment & support
Seeding Conversations

• Structure the dialogue toward a common goal
  – Ask the important questions not being asked
  – Periodically, core issues will become apparent
    • These will be broadcast to members on the Visioning Team for dissemination & discussion at the local level

• Reinforce search for alignment, not necessary complete agreement on the words used (80/20)

• Work to co-create an interdependence among those involved

• Focus on the dialogue, not just the deliverable

• Supported with employee communication & process facilitation by the Visioning Team
End Result

• Hierarchical structure of mission & vision statements
  – All bi-directionally aligned
    • Also aligned across functional interfaces
  – Seamless line-of-sight from the top to the employee
  – Supported through cultural stories

• Provides the basis for work activities when more explicit direction is lacking or not timely
  – Manage to the mission & vision
  – Provides some buffer to organizational impacts
    • 99% of what we do is not likely to change in the short-term