

# 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](http://www.enTarga.com)

2/19/2006

# 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

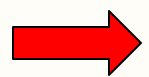
# Mission & Vision

- 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



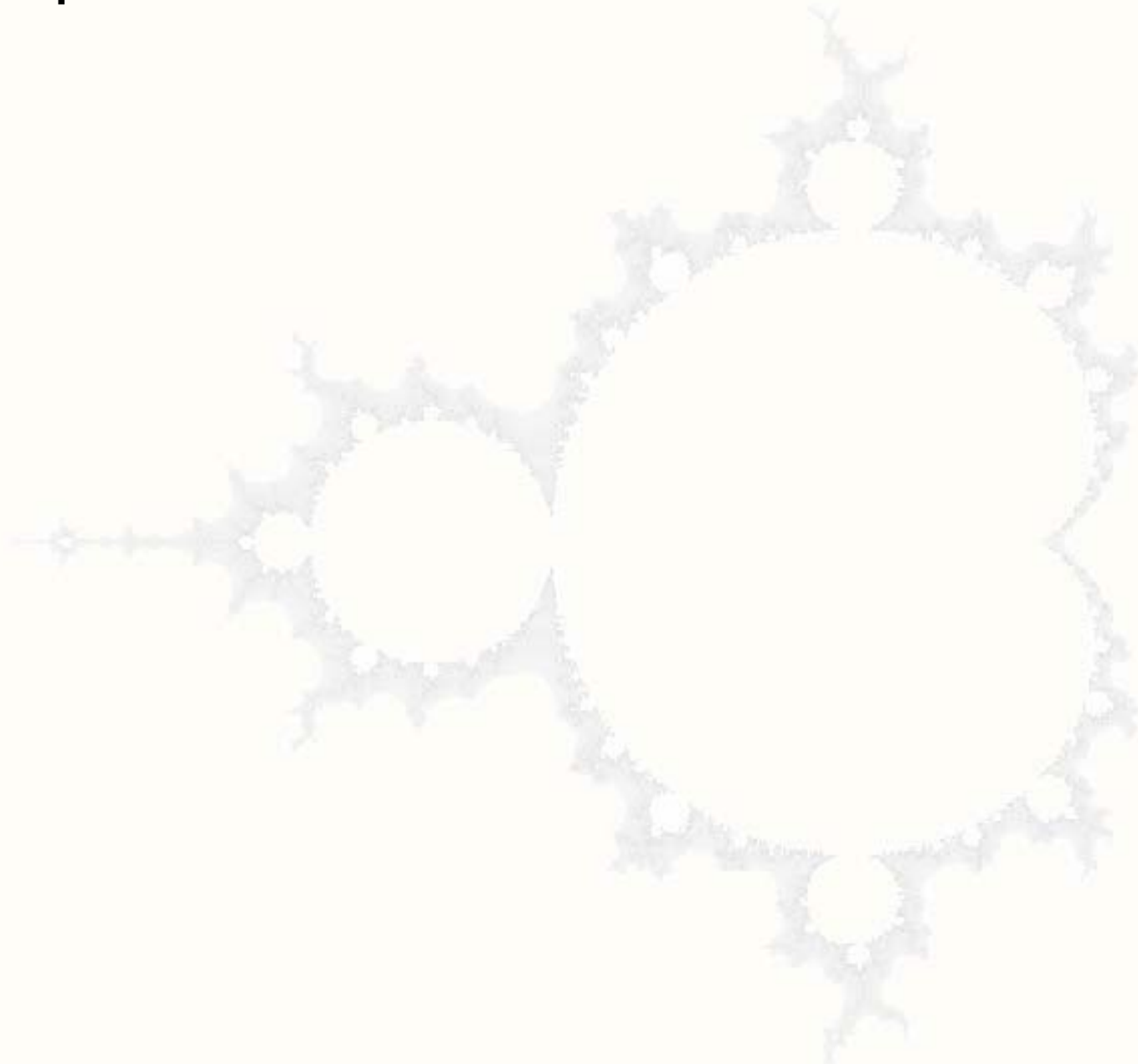
**Energize the Grassroots toward commitment (not just compliance)**

- Establishes foundation for a high performance culture

# Critical Elements for Deliverable

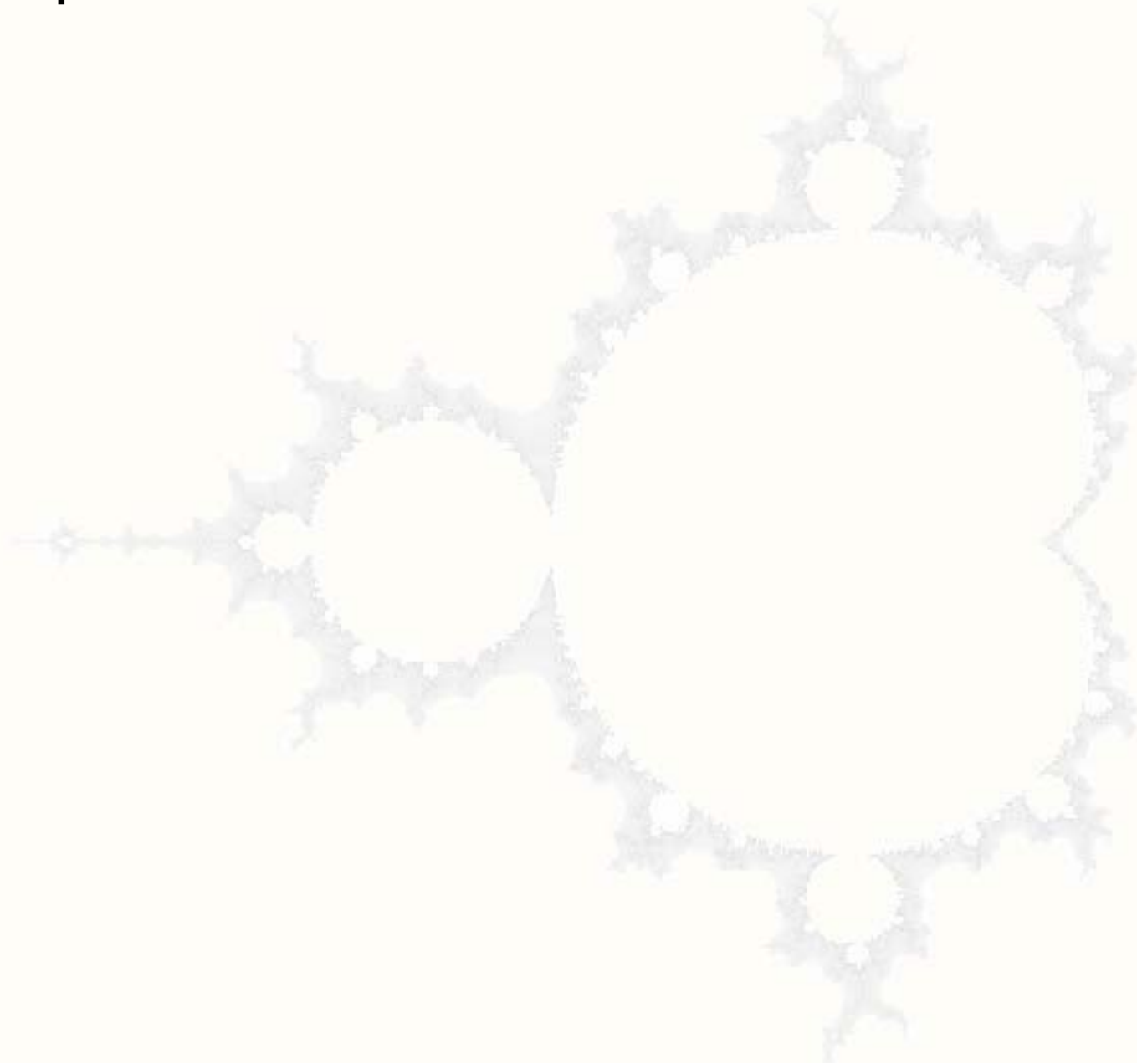
- Sufficiently broad
  - the “essence” of the company
- Exciting – provides a team focus
- Contains sufficient guidance for required action
- Seen as doable, but a worthy challenge
- Words are focused, but understandable
- Success is evident through objective measurements
- Provides a basis for line-of-sight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

# Sample Mission





# Sample Vision



# Visioning Timeline

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	later
Identify Visioning Team members	█						
Kick-off		█					
Personal Visioning		█	█	█			
Involve grassroots thru networking			█	█	█		
Initiate employee communication				█	█	█	█
Search for Commonalities - local			█	█	█		
Bubble up & trickle down					█	█	█
Seeding Conversations					█	█	█
Craft supporting stories						█	█
Summarize & wrap up							█
Assessment & gap closure (later)							█

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 1<sup>st</sup>
    - 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 1<sup>st</sup> 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 1<sup>st</sup> 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