

# Vision Management

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# Introduction

## Do we really share our visions and goals?

### When do you want to design a vision?

1. When the company needs a shared mindset, identity, or something else, which can unite employees, management, customers or others who are close to the company.
2. Management wants to improve the general level of enthusiasm and motivation throughout the company.
3. Management needs a tool, by which they can communicate to all employees and possibly to customers as well.
4. The level of commitment and energy among staff members are generally too low. There are too few initiatives, the level of loyalty is not sufficient, and there is a lack of mutual support among staff.

### Author

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Otherwise these toolkits might inspire you:

#### **Strategy Review - Is the strategy what it should be?**

This tool-kit is about “whereto the ship is sailing, and how the cruise is taking place”. The tool-kit will help you to identify the strategic aspects of what your enterprise does from day to day. It will help you piece them together, and to check if something should be changed. You can do it alone, but the effect will be better, if you involve other key people.

Find it at [www.henrikwbendix.dk](http://www.henrikwbendix.dk) Check “Ressources”.

#### **Valuebased Management - Are our values clear, strong, and supportive to the business**

Value based management aims at getting everybody to understand and feel the meaning of their work. Personal commitment and initiative are much better motives than the feeling of duty. This material provides you with tools on how to support and manage a process which clarifies the values and the practical implementation of these.

Find it at [www.henrikwbendix.dk](http://www.henrikwbendix.dk) . Check “Ressources” .

# User Guide: Vision Management

## A shared mindset

As top manager you often ask yourself: How can I help motivate the staff, when I no longer have the time or resources to reach all of the employees?

You need a method that can help yourself, your managers, and their staff to move aligned and united. You may have even heard about value-based leadership, vision management, creating an organizational culture etc.

But the important part is that you create a shared mindset for all the people involved in your business. In this exercise we have named it: visions – but please remember that the ultimate goal is to create a shared mindset.

A vision is a way to express your dream. So a vision is a statement describing how a company finds its fulfillment by answering the question: What kind of future are we trying to create?

If you decide to create a visionary company, your company will most likely be driven by value, committed to learning, adapting to changes in the environment, and will be prepared to make alliances with both internal and external partners.

In the following reading, you can learn a systematic method that will engage you and other key-players in the creation and definition of your shared vision. In addition you will be able to evaluate how well you are prepared to communicate the vision effectively.

You may decide to administrate this method by yourself, but will benefit greatly, if you include others.

The purpose of a vision is:

1. To release a high level of emotional energy among all important stakeholders, especially managers, employees and customers and...
2. To create a shared mindset, which aligns the stakeholders.

Maybe you are thinking that visions are always created by highly intuitive leaders – the kind of people who radiate charisma. But, quite frankly, most of us don't possess these talents. Therefore this method is designed for the rational mind.

### Case: Vision Management

#### **An example - a vision in a medium sized private company**

"We are a local company, which are second to none for customers and employees. We will be more profitable than our competitors, and we will remain independent. We will make it very easy to be our customer. This will be achieved by releasing a very high level of employee-energy."

This is the vision for a company with app. 300 employees, dominating the local market, and having achieved outstanding financial results. The vision was developed using the methods described here.

Some of the major steps are described below.

The process can be exciting, more complex than you believe and frustrating. Therefore, please arm yourself with some patience. We're not throwing pixie dust.

### Preparation

Before you begin, make sure that you know who will be involved. If you do it yourself, go right ahead. If you are not alone, make sure that the others have been informed, have assigned sufficient time, and have had a brief introduction to the purpose.

In the second case have the following materials ready: Flipchart, post-it pads, flipchart-pens, tape and a no-disturbance sign.

### Case: Vision Management

#### Background

A group of executives (and in this case supported by a number of young and potential managers) were performing the process.

The reason for applying this approach was that a similar approach had been tried (unsuccessfully) 4 years earlier. And now it was time to make an extra effort in order to be able to retain the talented younger employees. But it was also decided because top management wanted to create a higher level of responsibility amongst employees.

### Decide your Time-span

Your first decision is to identify the time-span.

This is the length of time the vision will be relevant for. You rarely will use a time-span shorter than 3 years, and not much longer than 10 years.

#### Time span

So the date today is: \_\_\_\_\_  
You will focus your vision  
on following date: \_\_\_\_\_  
(Today + Time-span): \_\_\_\_\_

### Case: Vision Management

#### The process

The team was introduced to the major steps and objectives of the process and began the discussion related to the period.

The team decided for a time-span of 5 years.

## Who has an interest in your company?

In order for you to understand what you can achieve by this method and also grasp some of the potential dangers that you will face, please answer the questions in the form.

Company Stakeholders are the core of this method. A stakeholder is someone, (an individual, a group of employees, customers, shareholders etc), who has a special interest in your business – positive or negative. A stakeholder wants a reward for his/her contribution. Since there always are several stakeholders, we will talk about a coalition of stakeholders.

### The 4 most important stakeholders

In order for you to make certain that you'll include the most important stakeholders, complete form 2. Consider your answers, and decide which 4 stakeholders are the most important ones for your company. Evaluate their strengths and whether they are positive or negative. Write the names of the 4 stakeholders at the top of form 3.

What do the stakeholders prefer?

The purpose of form 3, position analysis, is for you to understand the preferences of each stakeholder. You may interview stakeholders or you may interpret what they would have answered themselves. If you find that one of the stakeholders is less important, then leave this one out of the rest of the process. But you will need 3 stakeholders. Perform this analysis relatively fast.

## To write a vision for each stakeholder

You are now going to write visions for each of the stakeholders.

Write the name of each stakeholder on a "post-it" pad, and place the pads next to each other on the wall.

Imagine now, that you are at the end of the time span. Describe in single statements (1 or 2 words) how each of the stakeholders perceives the company at this time (It is almost like the movie "Back to the Future"). These words describe the ideal view of the company from the point of view of each of the stakeholders.

Write each statement on one post-it pad, and place this below the name of the relevant stakeholder. This task is performed individually. Limit yourself to 4 – 5 statements.

Read the statements below each stakeholder, and merge these statements into 1 – 2 statements (sentences) for each stakeholder. These sentences express the stakeholder's vision. Express yourself in strong and maybe extreme terms, yet be realistic, and don't be afraid to be "big and hairy".

Transfer these merged statements to form 4, Visions for stakeholders

## Case: Vision Management

### Stakeholders

The stakeholders were identified, and the four most important ones were: Customers (divided into 2 major customer segments), employees, owners (a large number of shareholders, of whom many are local), and suppliers.

During the analysis of stakeholder preferences (form 3) the last group of stakeholders (suppliers) was deleted, but the customers were divided into the two groups: private customers and business customers.

There was a lengthy discussion related to a segmentation of the employees, but it was decided to leave this group as one. So the stakeholders were private and business customers, employees and shareholders.

## Case: Vision Management

### The vision

A workshop focusing on the future was conducted in order to focus on the participants' expectations for the company over the next five years.

It was decided not to involve the stakeholders directly, but let the participants imagine how the stakeholders would prefer the company to be 5 years into the future.

Some of the words written on the post-it stickers relating to the Stakeholders were:

Private Customers:

- "They know me!"
- "It's easy to be a customer!"
- "High level of service!"

Business customers:

- "They connect me to other companies!"
- "I have my special advisor!"
- "I feel my business is important to them!"
- "The company is also my customer!"

Employees:

- "I've learned that we make an excellent team!"
- "I make a difference!"
- "I can go directly to anyone!"
- "It is fun."

The owners:

- "The value of the company is increasing above average!"
- "I'm well informed!"
- "I'm part of the community related to the company!"

Based on these and many other statements, visions were written for each of the stakeholders.

For instance:

The Employees: We want to create a company where, we can develop professionally, have an impact, work in a positive climate and openly share information with one another to create results for the company, its customers and ourselves.

The Owners: We want the company to be the dominating force in the local market with a focus on growth and development that will create a profit, which is clearly above the relevant alternatives.

Finally the 4 visions were united to the vision stated in the beginning of this description.

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The whole process up to this point lasted 1½ days.

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### **The vision for your company**

Study and discuss these 3 - 4 visions in order to formulate the final vision for the company. Try to avoid commonalities, be unique, use metaphors, and appeal to issues that are shared by different stakeholders. Include emotional statements if possible and express positive attitudes.

This step in the process can take some time – and it should. You are in the process of describing the future of your company. Make sure to write down new ideas, which appear during the discussion, and don't jump to conclusions, just because time is running.

Finally, write the final vision at the bottom of form 4.

### **Take a break!**

### **Quality control**

Then make a quality check of the vision. If you are alone, pay attention to your own feeling about the vision. Will you be ready to stand up and defend this vision and explain its' consequences. If you have the slightest doubt, try to reformulate the vision.

If there are several people participating, then make sure that you all agree on the formulation. Not just by majority vote, but because each of you individually feel that this is the right vision. You may let someone play the Devils Advocate, and bring up all possible negative aspects or consequences of the vision, and then let the others defend it.

Go to form 5. This is your opportunity to control the quality of the vision. Each of the questions should have a high score (4 or 5). If this is not the case, the question itself will indicate the necessary action.

Some of the questions pertain to the vision statement itself, while others relate to the very important process of communication.

### **Case: Vision Management**

#### **A problem:**

Following the description of the visions for each of the stakeholders, one of the participants had to leave due to an urgent business matter. Meanwhile the rest of the group finished the final vision. And they felt good about it.

When the one, who left, returned, he was introduced to the vision. His reaction was at first hesitant and then very critical. Therefore the group was returning to the process of rewriting the vision. The reason for this was that all of the participants needed to be in absolute agreement about the vision.

So the group continued for another two or three hours before they finally agreed on the vision.

### **Case: Vision Management**

#### **The devils advocate**

During the next meeting, all participants were tested in their understanding of the vision. A game was played in which each participant was seated in the "hot chair" and the other members of the group bombarded the "victim" with negative and critical questions and comments. During this process it was discovered how important it was to have anticipated the resistance, which may occur once you begin to communicate the vision.

In this process the important role of the managers were stressed, and how important it is, that they have the vision as a "shared mindset".

### **Most visions fail because of lack of effective communication**

Therefore, take your time to design a “1-minute-speech”, which you can use to inform anyone, when they ask you about the vision. Rehearse this speech with your colleagues.

When you feel comfortable with your answers to these questions you are ready to make a plan for communication.

#### **Case: Vision Management**

##### **Communication**

A plan for introduction of the vision was made. The overall plan consisted of:

1. Communication to all managers
2. Workshop for all managers in order for them to understand the consequences
3. A plan for communication to all of the employees
4. The managers planned their communication with their teams as a follow up to point 3.

Everyone, who was to be responsible for communication of the vision, was trained to do this.

## Form 2: Identification of Stakeholders

Point of analysis	Your response
1. Who “owns” the process of vision management?	
2. Who will use the final vision?	
3. Who will have to accept the results achieved by the company?	
4. Who will need to know about the final vision?	
5. Who has initiated the vision process? And who would like to have an impact on the process?	
6. Who will be influenced by the outcome of the vision i.e. who will notice, be bothered, benefit, face changes etc.?	
7. Who will deliver knowledge, resources, and inputs?	
8. Who will object and resist the vision?	
9. Which new stakeholders can you imagine will appear within the time-span?	
10. (Define own question)	
11. (Define own question)	

# Form 3: Analysis of Stakeholders' Position

Stakeholders			
Name:			
Special areas of interest			
Attitude towards the Company? Why?			
Expectations about influence on process and results?			
The influence on the success of the vision project? How?			
Relationships between stakeholders			
Orientation towards conflicts			
Possible contributions to the vision project or the company in general			
Possible rewards through participation			

# Form 4: Visions for stakeholders

Stakeholder	Vision

Final Vision Based Upon the Visions Stated Above

# Form 5: Index for Evaluation of the Vision

Evaluation criteria	Score: 1 – 5	Mark if action is needed
1. Is the vision statement unique?		
2. Does the vision include the future view of all, important stakeholders in a balanced manner?		
3. To what extent does the vision appeal to emotions?		
4. To what extent is the vision stated with positive terms?		
5. To what extent do you believe the vision is motivational and will release energy?		
6. Your knowledge about all of the details in the vision?		
7. To what extent have you tested your ability to argue against people, who resist the vision?		
8. Have you developed a "1-minute-speech", which coherently and reliably can communicate the vision to anyone?		
9. To what extent have you trained your yourself and exercised the communication of the vision		
10. To what extent have you developed the ability to relate the vision to everyday actions, tasks etc?		

Answer each of the questions. Apply a scale from 1 – 5.

- 1 = Criteria is not applied at all  
 5 = Criteria is applied optimally

## Form 6: Questions Related to Implementation

Question		Answer
1	Do you have a person who is responsible for the implementation of the vision?	
2	Have you designed a plan for introduction of the vision? Who will be informed when, by whom, and by means of what media?	
3	Have you assigned ample time for answering questions related to the vision at this meeting?	
4	Will the person who is in charge of the communication, be considered credible by the audience?	
5	Has the person who is communicating been trained in the communication?	
6	What are you going to do about those managers, who do not have the sufficient competence to communicate the vision to his/her employees?	
7	Have you designed a plan for the continued reinforcement of the vision? (Who will be doing what and when in the future?)	
8	Do you have a way of measuring to what extent the vision is being understood, applied and causing new behaviour and improved results?	
9	How are you going to add items that will directly show the impact of the vision? (For instance, posters, t-shirts, bags, streamers, screen-savers, mouse-pads etc.)	
10	Do you realize that when you feel that you have over-communicated the vision tenfold, the message may be just then beginning to sink in among the staff members?	

