

## Vision Development Worksheet

*Use the instructions provided to lead you to creating an organizational vision.*

### What is an organizational vision?

- A well-conceived vision consists of two major components—**CORE IDEOLOGY** and an **ENVISIONED FUTURE**.
- The *core ideology component* defines “what we stand for and why we exist” that does not change. We already are the core ideology and without it, our organization would crumble
- The *envisioned future component* sets forth “what we aspire to become, to achieve, to create” that will require significant change and progress to attain.
- Notice the direct parallel to the fundamental “preserve the core-stimulate progress” dynamic.
- A good vision builds on the interplay between these two complementary Yin-and-Yang forces

<b>ORGANIZATIONAL VISION</b>	
<b>CORE IDEOLOGY</b>	<b>ENVISIONED FUTURE</b>
<i>Core Purpose:</i>	<i>25-Year Inspired Goal:</i>
<i>Core Values:</i>	<i>Vivid Description:</i>

### Vision Development:

- Core Ideology Development
  - Core Purpose Development
  - Core Values Development
- Envisioned Future Development
  - 25-Year Inspired Goal
  - Vivid Description

### CORE IDEOLOGY DEVELOPMENT

#### Core Ideology = Core Values + Core Purpose

- **Core values** are the organization's essential and enduring tenets—a small set of timeless guiding principles that require no external



justification; they have *intrinsic* value and importance to those inside the organization.

## **CORE IDEOLOGY DEVELOPMENT**

**Core Ideology = Core Values + Core Purpose**

### **First, craft your Core Values**

Core values are the organization's essential and enduring tenets—a small set of timeless guiding principles that require no external justification; they have *intrinsic* value and importance to those inside the organization.

Examples of Core Values:

- Having the best product on the market, or not having the product at all
- To be the best at “X”
- To provide the greatest value for “X”
- Integrity
- Joy
- Commitment to work-life balance
- Our products inspire joy, celebration, and fun
- Commitment to bringing fun to our employees and customers
- Belief in intuition
- Strength and perseverance
- Promoting feel-good feelings
- Financially rewarding to the shareholders and employees
- We put our people first
- We believe in the quality of our product
- Personal growth and well being
- Collaboration and Teamwork
- Joyful atmosphere
- Social consciousness
- Apply passion, creativity and skills and strengths to everything we do
- To nourish well being in body, mind, and spirit
- To honor the balance between work and home
- To listen and respond to each other with openness and respect
- To cultivate something together that is greater than any of us could do alone
- To infuse possibility and positive energy into our everyday experience
- To foster authenticity and the spirit of play within our company and with the world.
- To produce only what we love
- To infuse hope and faith into our products, employees, and customers

*Write down 5-8 core values that you believe are essential to your organization:*

- *Integrity – Intrinsic woven cloth that represents every fiber of my being that says “I’m genuine” –*
- *Everything about who we are and what we do is delivered with integrity*
- *A true color that*
  - *Services being offered*
  - *I stand behind the products*
  - *The business is consistent in how it delivers the services*
  - *Everybody shows up*
  - *Authentic and with integrity*
  - *It has everything to do with*
  - *Channeling energy and healing to come through*

*For hints and clues to your Core Values, look to your Decision Manifesto, your description of your ideal customer, and your list of what you want your ideal customers to expect of you.*

*Test each of your proposed core values against the following questions:*

1. If you were to start a new organization, would you build it around this core value regardless of what the organization was setting out to do?
2. Would you want the organization to stand for this core value 100 years from now, no matter what changes occur in the outside world?
3. Would you want the organization to hold this core value, even if at some point it became a competitive *disadvantage* – even if in some instances the environment penalized the organization for living this core value?
4. Do you believe that those who do not share this core value – those who breach it consistently – simply do not belong in your organization?
5. Would you personally continue to hold this core value even if it were not rewarding for holding it?
6. Would you leave the organization before giving up this core value?

*Ideal core values will pass each of the above questions positively.*

## **Second, draft a Core Purpose**

Core purpose is the organization’s *fundamental reason for being*. An effective purpose reflects the importance people attach to the company’s work—it taps their idealistic motivations—and gets at the deeper reasons for an organization’s existence.

Examples of Core Purpose:

- Merck: To preserve and improve human life



- Nike: To experience the emotion of competition, winning and crushing competitors
- Teaching Co: To ignite in all people the passion for learning
- Sony: To experience the pure joy of advancing and applying technology for the benefit of the public
- Walt Disney: To make people happy
- Mary Kay: To give unlimited opportunity to women
- Univ. of Texas: To transform lives through inspired learning

*Write down some ideas of what you believe your Core Purpose should be:*

*For hints and clues to your Core Purpose, look to your Decision Manifesto, your Life Vision, and your Life Purpose.*

*Test each of your proposed core values against the following questions:*

1. Do you find this purpose personally inspiring?
2. Can you envision this purpose being as valid 100 years from now as it is today?
3. Does this purpose help you think expansively about the long-term possibilities and range of activities the organization can consider over the next 100 years, beyond it's current products, services, markets, and strategies?
4. Does the purpose help you to decide which activities to *not* pursuit, to eliminate from consideration?
5. Is this purpose *authentic* – something true to what the organization is all about – not merely words on paper that sound nice?
6. Would this purpose be greeted with enthusiasm rather than cynicism by a broad base of people in the organization?
7. When telling your family and/or loved ones what you are doing with this organization, would you feel proud in describing your work in terms of this purpose?

## **ENVISIONED FUTURE DEVELOPMENT**

**Envisioned Future = 25-YEAR INSPIRED GOAL + Vivid Description**

**The Envisioned Future** is the second primary component of the vision framework—consists of two parts: a 10-to-30-year inspiring, world-changing goal (**25-YEAR INSPIRED GOAL**) and **vivid descriptions** of what it will be like when the organization achieves the 25-YEAR INSPIRED GOAL

This is an exercise to set a goal—to pick the mountain you are trying to climb – not to create a perfect “statement.”



**25-YEAR INSPIRED GOAL** is a 10-to-30-year objective—like a big mountain to climb—that serves as a unifying focal point of effort, galvanizing people and creating team spirit. It is crisp, compelling and easy to understand.

All companies have goals. But there is a difference between merely “having a goal” and becoming committed to a huge, daunting challenge—like climbing a big mountain. A true 25-YEAR INSPIRED GOAL is clear and compelling and serves as a unifying focal point of effort and acts as a catalyst for team spirit. It has a clear finish line, so the organization can know when it has achieved the goal; people like to shoot for finish lines. A 25-YEAR INSPIRED GOAL engages people—it reaches out and grabs them in the gut. It is tangible, energizing, highly focused. People “get it” right away; it takes little or no explanation.

The goal itself—the mountain to climb—needs to be so easy to grasp, so compelling in its own right, that it could be said one hundred different ways, yet be easily understood by everyone.

Setting the INSPIRED GOAL 10 to 30 years into the future requires thinking beyond the current capabilities of the organization and current environmental trends, forces, and conditions. An INSPIRED GOAL should not be a sure bet—perhaps only 50 percent to 70 percent probability of success—but the organization must believe “we can do it anyway.” It should require extraordinary effort, and perhaps a little luck.

An Inspired, World-Changing Goal is a clear, measurable goal that you'd feel doggone excited to accomplish in the next 10-30 years. It's a real goal, and not just some pie-in-the-sky mission statement or wish for world peace. It's a specific, measurable goal that you can clearly define and you can objectively know when it is complete.

**A well-constructed Inspired World-Changing Goal has several key attributes:**

1. **It lights up your heart and inspires you to your core.** When you think about it, you are instantly filled with motivation, purpose, inspiration and excitement. It simply must be loaded with authentic desire within you. Without that, it's not really an *inspired* goal, now is it?
2. **It is 50-70% likely that you will be able to achieve it in 10-30 years.** It's indeed possible for you to accomplish this goal, but it will require a great deal of commitment on the part of everyone in your business to make it happen. It's not a sure thing, but with every ounce of focus and commitment, you can do it!
3. **It will require you to transform and grow.** In order for you and your team to accomplish it, you will be required to evolve, shedding fear and embracing empowerment. You will need courage, perseverance, commitment, and inspiration, in order to make this goal a reality. It's a goal that requires the very best of you to come forward.
4. **It passes the Mount Everest test.** In other words, your goal is as specific as climbing to the top of Mount Everest. I know, you know, your team knows, and the rest of the world knows what it means to climb to the top of Mount Everest. The same should be true for your goal. Specific, measurable, achievable,



- understandable, definable. It is in no way subjective. If you state your goal and people don't clearly understand what you mean by it, then it fails the Mount Everest test and is not a true Inspired, World-Changing Goal. You should be able to tell your friend what your Inspired, World-Changing Goal is, and she should be able to easily -- and in her own words -- tell others what your goal is.
5. **It involves more than you.** This is what makes it "world-changing." In some way, an Inspired, World-Changing Goal benefits another. It transcends the self in some way and paves the way for your inner fulfillment to meet the need of the world in some way. Inherent in the goal are benefits to others, who might include your clients, your employees, your family, your community, the environment, a specific group of people, or a social cause.
  6. **It's profound yet simple.** You can say it in 20 words or less. It's not loaded with descriptions, prepositional phrases, adjectives, etc. It's clear and simple -- "my goal is to climb to the top of Mount Everest." No other colorful expressions are needed to describe it.

Here are some examples of what an Inspired World-Changing Goal is *not*:

- *To bring peace to the world.* (It fails #2 and #4 from above.)
- *To sell my product to 300 million women.* (Unless you are Procter & Gamble, it's likely that you'd be failing #2 from above.)
- *To inspire people around the world with a feeling of hope, possibility, joy, and fulfillment.* (It fails #2, #4, and #6 from above.)
- *To generate \$25 million in annual revenues.* (It fails #5.)
- *To consistently have 5 clients and increase annual revenues by 10%.* (Sorry but this is just not that inspiring! It likely fails #1, #2, and #3 from above.)

Here are some examples of what an Inspired World-Changing Goal is:

- *To pass a bill in Congress implementing Department of Peace in the Executive Branch of U.S. Government*
- *To attract 1,000 new clients each month and enroll them in buying an ABC Co. product or service.*
- *To open a Wellness University that provides at least 10 unique certification programs.*
- *To build a retreat center that serves 10,000 guests annually.*
- *To be named as one of Fortune Magazine's top companies to work for.*
- *To take 1000 artists on a Spiritual Discovery Tour.*
- *To give \$1 million to charity (based on a rate of tithing 10%).*

**Vivid description** is a vibrant, engaging, and specific description of what it will be like to achieve the INSPIRED GOAL. Think of it as translating the vision from words into pictures, of creating an image that people can carry around in their heads. This "picture painting" is essential for making the 10- to 30-year INSPIRED GOAL tangible in people's minds.

Passion, emotion, and conviction are essential parts of the vivid description.



Winston Churchill understood this when he described the INSPIRED GOAL facing Great Britain in 1940. He didn't just say "Beat Hitler." He said: "Hitler knows he will have to break us on this island or lose the war. If we can stand up to him all Europe may be free and the life of the world may move forward into broad, sunlit uplands. But if we fail, the whole world including the United States, including all we have known and cared for, will sink into the abyss of a new Dark Age, made more sinister, and perhaps more protracted, by the lights of perverted science. Let us therefore brace ourselves to our duties, and so bear ourselves that if the British Empire and its Commonwealth last for a thousand years, men will still say, 'This was their finest hour.' "

**Create a 10-30-YEAR INSPIRED GOAL for the organization (or a few):**

***Test the INSPIRED GOAL(s) against the questions below:***

1. Do you find this INSPIRED GOAL exciting?
2. Is the INSPIRED GOAL clear, compelling and easy to grasp?
3. Does this INSPIRED GOAL connect somehow to the core purpose?
4. Will this INSPIRED GOAL be exciting to a broad base of people in the organization, not just those with executive responsibility?
5. Is it undeniably an INSPIRED GOAL, not a verbose, hard to understand, convoluted, impossible to remember mission or vision "statement"? In other words, does it pass the "Mount Everest Standard"?
6. Do you believe that the organization has less than 100% chance of achieving the INSPIRED GOAL (50-70% chance is ideal) yet at the same time believe the organization *can* achieve the INSPIRED GOAL if fully committed?
7. Will achieving the INSPIRED GOAL require a quantum step in the capabilities and characteristics of the organization?
8. In 25 years, would we be able to tell if we achieved the INSPIRED GOAL?

**Now, write the Vivid Description of the 10-30-YEAR INSPIRED GOAL fully manifested, weaving in the Core Purpose and Core Values:**



*Test the vivid-description snip-its against the questions below:*

1. Does the Vivid Description conjure up pictures and images of what it will be like to achieve our vision? If it does not create a clear picture in your mind's eye, then it is not clear enough.
2. Does it use specific, concrete examples and analogies to bring the vision to life, rather than bland platitudes?
3. Does it express passion, intensity and emotion?
4. When reading the vivid description, do you think, "Wow, it would be really fantastic to make all this happen. I really want to be a part of that, and I'm willing to put out significant effort to realize this vision."