How to Create a Shared Vision Statement

A vision statement is an aspirational description of what an organisation or team would like to achieve or accomplish in the future. It is intended to serve as a clear guide for choosing current and future courses of action. It is usually written in the present tense although it describes the future.

Having a clear vision can give a team direction and inspiration, and be the foundation for goal setting and action planning. Strategic leaders ensure there is a vision for all staff to ‘sign up to’.

You can create a vision statement by yourself or collaboratively. The advantages of involving others in the creation of a vision are a greater degree of commitment, engagement, and diversity of ideas and thinking. It’s useful to take some time before a collaborative visioning session to explore your own ideas and thoughts in preparation.

The objective for the collaborative session is to energise the team, gain commitment, and provide direction. It doesn’t have to be a finished product or look pretty. The process of sharing thinking and exploring possibilities is the important part.

So if you’re taking over a new team, starting a project, or just need to take your team in another direction, here is a ten step process on how to create a shared vision statement:

1. Get the right people on the bus

It all starts with getting the right people together. In many cases, this may just be your own staff or team. In other cases, it could be dotted-line team members, project team members, and other key stakeholders (students, parents, governors) who might have good ideas to contribute and have a part to play in
implementation of the vision. It might be the whole school with parent representatives.

2. Preparation

Schedule at least a 1/2 day, or a full day for larger, more complex scenarios. An off-site location is best, if possible. You want to minimise interruptions, and get people away from their day-to-day environment in order to stimulate creativity. For dispersed teams, a live meeting is a must.

Consider the use of a neutral “facilitator”. That is, someone trained in group process that has no biases or stake in the game. That way, as a leader, you are able to sit back and focus on being a participant, and not have to worry about the mechanics of the meeting. Removing yourself as the focal point also helps open up the free flow of open dialogue.

Rule of thumb: for every hour of meeting time, double the amount of preparation needed.

3. Determine appropriate “input” to the vision.

Schedule the meeting far enough ahead of time to allow for preparation. Send out documents to review ahead of time, i.e., market research, competitor analysis, survey results, thinkpieces, research papers or any other information needed to prepare the participants. Establish the expectation that preparation is a must in order to participate, and follow-up to make sure people have done their pre-work. Following up may sound like baby-sitting, but it’s also a good excuse to get a feel for where each participant is coming from, plant some seeds, and create a little pre-meeting buzz.

Consider adding internal or external guest speakers to the early part of your agenda. For example, when I first took over my current team, I brought in senior leaders to discuss company strategy and leadership development implications, as well as an external consultant to review trends and best practices.

4. Set the stage.

At the start of the meeting, review the desired outcomes, agenda, process and ground rules. Take extra time here to check for understanding and agreement. Doing this sets the stage for how the rest of the day will flow - you are modelling collaboration and consensus. Going slow here will allow you to go fast for the rest of the day.

5. Create and use a process that ensures full participation, openness, creativity, and efficiency.

A trained facilitator can help you with this, or you can design it yourself. The key is to have a plan and process - you can’t just go in and “wing it” like you may do in
a regular meeting. Here's a process that works well:

- Explain to the team what a vision statement is and why they are important. You might show a few examples.

- Ask the group to imagine what this team, organisation, or project could look like 3-5 years from now. What would success look like? What could you achieve? What would they love to achieve? If they were to pick up a newspaper 3-5 years from now, what would the headline say about what this group has accomplished?

- Either individually, in pairs, or in groups of 3-4, have people create those headlines on flip charts. Tell them to include pictures, phrases, or anything else to describe that desired future. Give them about 30 minutes.

- Ask each person or team report out to the larger group. If you are the leader, go last, so you don’t bias the rest of the group. This also gives you the opportunity to incorporate other’s ideas into your vision.

- The facilitator or leader should be listening for and recording on a flip chart key phrases that describe each vision. This is the time to listen and to ask clarifying questions, but not to evaluate.

- add up the number of phrases (n), divide by 3, and give everyone that many stickers to "vote" with (n/3). Explain it’s not really a decision making vote, it’s simply a way to quickly take the temperature of the group and see how much agreement there is.

- Start with phrases that received a lot of vote, discuss, and check for agreement. Do the same thing for phases that received no or few votes, and ask if those items can be crossed off. Work your way to the middle items, using the same process - circle it or cross it off.

- If there are any issues where consensus can’t be reached after everyone has had a chance to state their case, then the leader needs to make the final decision.

- You end the meeting with a list of phrases that will form the vision statement.

6. Do the "cosmetic work" off line

Group time should not be wasted creating the vision statement and wordsmithing it to death. The leader can do this off-line, and/or ask for one or two volunteers to do it. It can be done during lunch to present back to the team in the afternoon.

7. Talk to the outliers

If there was anyone who disagreed with the output, or whose favourite idea was not incorporated, talk to them privately to make see how they are committed to the vision. Explore ways to make connect the vision to their interests and needs.
8. Re-convene the group and review the draft vision statement.

This is a shorter meeting, and can be done over say at a staff meeting. Go for “roughly right”, or “directionally sound”, vs. falling into the trap of drawn-out debates over using the word “grow” or “increase”.

9. Review the draft with key extended stakeholders that were not at the meeting.

This is the time to review the vision with your manager, peers, students, parents, governors and anyone one that has a stake in your team's work. It's a chance to get input and make it better, and to begin to build a broader coalition of support.

10. Communicate the vision and begin to make it a reality.

A vision is just a dream without solid goals and action plans. That's the team's next step and requires at least another short meeting. Get some of your creative people involved to bring it alive in a way that inspires, using images, metaphors, and stories.

Investing the time to create a shared vision may be the best investment you've ever made as the leader of your team.