

**Professional Services Capability Framework: Leading and Managing**

**How to Create a Shared Vision That Works**

**Introduction**

This is a “how to” worksheet for leaders and team members who want to create a shared vision. It provides one roadmap for the process of creating a shared vision that not only inspires, but also provides clarity on direction and ongoing guidelines for decision-making.

It follows the following 5 step approach

**Step 1**

Create a shared vision

* Significant purpose
* Clear values
* Picture the future

**Step 2**

Honestly describe current reality

* Create creative tension

**Step 3**

Strategies and actions to move forward

* Strategies to leapfrog forward
* Structural integrity

**Step 4**

Plan to improve and communicate

* How will change be created?
* How will it be communicated

**Step 5**

**Personal commitment**

* How will we all live this?

**What is a compelling vision?**

A compelling vision should answer three questions:

1. **Destination**: Where are we going?
2. **Purpose**: Why do we exist? What greater good do we serve?
3. **Values**: What principles guide our decisions and actions on our journey?

When a vision address all three of these questions, there is a higher level of commitment because employees are able to see the relationship between the direction of their organisation or team and what they personally believe in and care deeply about. Everyone is clear about what they are doing, why they are doing it, and how their work contributes.

There are 5 steps to create a compelling vision which has an impact. these are set out in detail below.

**Step 1: Create a Compelling Team Vision**

As a team, discuss the purpose and values of your team in turn before turning to your destination each of the elements of a compelling vision in turn (destination, purpose and values). Agree on what is essential and capture the key words that clearly convey the ideas that have been agreed upon. Do not spend team time finalising the wording: that can be done later.

(a) **Purpose**: Discuss and agree on your team’s purpose. Consider the following:

* **What business are we** really **in?** Who are our customers and what do they really need from us?
* **What is the real value we offer?** How do people benefit from what we offer?
* **What is the end-result that we offer?** What is our purpose from the viewpoint of the result, not the products or services you offer**.**

(b) **Values**: Identify the values needed to support your team’s purpose. Purpose answers why. Values answer how. They provide guidelines for decisions and daily behavior that will help fulfill your purpose. To surface your team's values, consider the following:

* Don’t assume that any values are simply “understood.” What you believe is “understood” is actually a core value.
* The meaning of the words is more important than the words themselves. Ensure their meaning is clearly defined and understood.
* Don’t make a "laundry list". You don’t need to include each person’s personal values. As long as there are no values conflicts, people can still act on their personal values. Focus on the values that are the key drivers to fulfill your team’s purpose. There are usually only three to five core values.
* Translate the values into observable behaviors. Providing behavioral examples helps people understand what the values look like when they are lived.
* As a leader, model the values consistently. People watch what you do more closely than they listen to what you say.
* Integrate the values into your daily processes and practices. Use your values to guide decisions and how you do business. They will not be effective if they are seen as something extra or “soft.”

(c) Decide how and when the vision statement will be written. Don’t get trapped into wordsmithing during your meeting. It is easiest for a couple of people to use the notes to write an initial draft after the meeting and then send it to the rest of the team for feedback. There are no prescriptions about how long a vision statement should be: it should be long enough to set out the destination, the purpose and the values of the team.

**Step 2: Honestly Describe the Current Reality**

Examine your current realities in relation to your vision: this will help you to realistically assess where you are now, and how far you need to move. Identify what’s working and what’s not, your strengths and weaknesses, what will support you in achieving your vision, and what will be a barrier. A “[Force-Field Analysis](../Delivering%20results/Force%20field%20analysis.docx)” can work well in this step and develop plans for collecting additional information to verify perceptions.

**Step 3: Identify Key Opportunities to move Forward**

Identify the greatest opportunities to close the gap between your vision and your current reality. Look for high-impact strategic goals – those that will allow you to leapfrog forward toward your vision. Include some quick wins to help you see progress and stay motivated.

**Step 4: Plan for Involvement and Communication**

For a vision to become reality, you must pay attention not only to what it says, but to how it’s created, how it’s communicated and how it’s lived.

**Develop a plan for ongoing communications within the team** to coordinate efforts, to provide feedback on your progress and to keep your vision alive. Also discuss how to communicate the results of this meeting with other stakeholders.

If this work is being done by a leadership team that wants to bring the vision forward to the rest of the organisation, your work during this step is to create a plan for involving others in shaping the vision, identifying the roadblocks and the strategies and goals to close the gap. You will need to present the vision statement as a draft and ask for feedback. Be open to requests for changes in language that do not change the essence of your vision. However, if there is a pattern of requests for substantive changes, it’s possible you may have missed something important and should revisit the first step.

**Step 5: Make Personal Commitments**

As soon as you identify your vision, if you believe in it, you must start to live it, behave consistently with it, and model the values.

In this last step, each team member identifies specific goals and actions they will personally take that demonstrate they are living the vision right now, even as they continue to develop the vision and work out the details. When they share their goals, they should also explain what they need from other team members for support. This is one of the most powerful steps in the process.