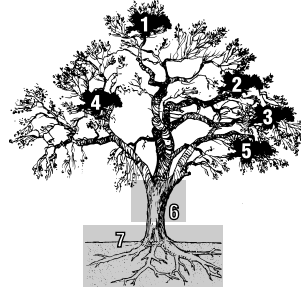




Business Monograph

by Hank Moore
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Developer of
the concept known as
THE BUSINESS TREE™

Visioning Scope

**Creating and Applying Vision
Toward Your Organization's Progress**

By Hank Moore
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This Management Monograph is for organizations which wish to grow successfully, excerpted from Hank Moore's book series: **The Business Tree™, The High Cost of Doing Nothing™, It's Almost Tomorrow™, Confluence, Secrets of the CEOs, and Pop Culture Wisdom.**
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Most organizations know **why** they exist and their **purpose**. Those fundamental elements constitute a **Mission Statement**.

Most organizations never go past the Mission Statement. Thus, they fail to realize potential. Having a purpose by itself does not make the organization materialize, much less be successful.

Visioning is the process where good ideas become something more. Visioning is a catalyst toward longterm evaluation, planning and implementation. Visioning is a jumpoff point by which forward-thinking organizations ask: What will we look like in the future? What do we want to become? How will we evolve? Vision is a **realistic picture** of what is possible.

Businesses, communities and organizations will succeed by having, communicating and garnering support for a Shared Vision. Visioning sets the stage for necessary processes, such as growth strategies, re-engineering, training, enhancing shareholder value and organizational development. Without visioning, the community simply performs **band-aid surgery** on problems as they occur. The Vision provides **continuous guidance** to employees at every level as to how they should manage their respective responsibilities.

Visioning must be Big Picture in perspective. It must creatively focus upon the whole and then the parts of the organization, as they relate to the whole. It is a process by which a Strategic Plan and Visioning program components come off the shelf and alive into action, relative to all levels of the organization:

- 1. Resource.** Equipment, tools, materials, schedules.
- 2. Skills-Tasks.** Duties, activities, tasks, behaviors, attitudes, contracting, project fulfillment.
- 3. Role-Job.** Assignments, responsibilities, functions, relationships, accountability.
- 4. Systems-Processes.** Structure, hiring, control, work design, supervision, decisions.
- 5. Strategy.** Planning, tactics, organizational development.
- 6. Culture-Mission.** Values, customs, beliefs, goals, objectives, benchmarking.
- 7. Philosophy.** Organizational purpose, vision, quality of life, ethics, longterm growth.

The Vision describes what can and will happen, once everyone's energies are focused. Vision is not a financial forecast or a market analysis. Vision is less of a dream and more of a **realistic picture** of what is possible.

When there is a genuine Vision (as compared to a terse "vision statement"), people are compelled to learn and excell...not because they are told to but because they want to.

Most leaders have personal visions that rarely get communicated to the organization. By default, Vision has resolved around the values and positioning of one leader. Often, a crisis will rally the organization, but that tends to be short-lived.

Given the choice, most people and their organizations will pursue **high goals**. Visioning is a process that melds individual visions into a recipe for success...a shared set of guiding practices. When different constituencies have common visions (or at least applications of them), they will **bond together** for purpose and cause.

Personal visions are driven by an individual's deep caring. Shared visions derive their **power** via common caring. Truly, people want to be connected together.

Shared visions take time to emerge. They grow as a result of successful showcasing of individual visions, with benchmarks for success that are understood. Ongoing conversation is required to foster shared visions. Out of listening, insights of what is possible shall emerge.

The **key elements** of Strategic Vision are:

1. Business scope and scale.
2. Product and market focus.
3. Competitive focus.
4. Orientation toward image and relationships.
5. Applicability to organization and culture.

Visioning needs to take place within each business unit, as well as at the larger organizational level. Too often, management fails to articulate its values or does so imperfectly.

Purposes and expected benefits of Visioning include:

- * Taking hold of the future.
- * Setting something in motion that will honor those who have built the organization.
- * Involving the widest base of support in pro-active change and growth.
- * Benchmarking the progress made...and communicating it to outside constituencies.
- * Nurturing the organization's image.
- * Understanding the difference between good and bad handling of crises.
- * Crises followups that help heal and rebuild after problems...versus those that fester and bring destruction to organizations.
- * Study and ready the organization to make best advantage of bridge-building and problem remediation concepts.
- * Methodologies to address problems sooner, rather than later.
- * Establishing safeguards against future trouble.
- * Putting more emphasis upon the positive ingredients and happenings.

What Visioning is Not....

- Revenue forecasting or quotas.
- Marketing campaign.
- Academic exercise in mumbo jumbo.
- Group facilitated top-down orders.

7 Steps Toward Strategic Vision

...how and why companies get from here to there.

1. Analyze the company's future environment, resources and capabilities. Determine where the Big Picture existed before, if it did at all. Crystallize the core business in terms of viabilities to move successfully forward to some discernible point.

2. Clarify management values. Growth must be conducted in concert with core values. Often, senior management have not yet fully articulated their own individual values, let alone those of the organization. This process helps to define and further develop value systems to carry the organization toward success.

3. Develop a Mission Statement. It is a starting point, not an end in itself. In reality, the Mission Statement is rewritten several times, as the planning process ensues. The last draft of the statement will be an executive summary of collective ideas and works of the Visioning team.

4. Identify strategic objectives and goals. I ask clients to do so without using three words: "technology," "sales," and "solutions." Most businesses fail to grow because they get stuck in buzz words and trite phrases that they hear in others' marketing hype. Objectives and goals must be germane to your company and its unique position.

5. Generate select strategic options. There are many ways to succeed, and your game plan should have at least five viable options. When the Visioning program matures and gets to its second generation, you'll find that winning formulas stem from a hybrid of the original strategic options. Creative thinking moves the company into the future, not rehashes of the earliest ideas.

6. Develop the vision statement. It will be action-oriented and speaks from the facts, as well as from the passion of company leaders. It will include a series of convictions why your organization will work smarter, be its best, stand for important things and be accountable.

7. Measure and review the progress. By benchmarking activities and accomplishments against planned objectives, then the company has a barometer of its previous phase and an indicator of its next phase.

The 7 traits of a successful Visioning Program include:

1. Effective visions are inspiring. They must touch the chords of what the company started out to become. They may compel leaders to renew or multiply their commitments for the future. Their messages can apply to every sector of the company.

2. Effective visions are clear and challenging...involving excellence. There is no such thing as perfection, but incremental levels of excellence are to be attained and bested. Every message must be communicated throughout the organization, acquiring feedback and additional commitments from the rank and file. Thereafter, visions become their brainchildren.

3. Effective visions have marketplace purpose, savvy and flexibility. It is not enough to look good on paper or touch the hearts of some. Visions must squarely place the company in the forefront of its market niche, customer base, industry perspective and economic realm. It's all about doing good business and then being a good organization.

4. Effective visions must be stable, yet prudently updated. No "pie in the sky" tenets or trite restatements of other companies' promotions are acceptable. Show how planned, controlled growth will maintain stability for investors, hold interest for the marketplace and propel the organization to break further new ground.

5. Effective visions are role models, when all else is in turmoil. Research shows that only 2% of the world's companies have strategic plans. Visioning programs go far beyond the plan and root the corporate culture into something real and breathing. While most companies meander, your visionary company can chart its own course.

6. Effective visions empower the organization's people first and the customers secondly. People constitute the largest component (28%) of a successful organization. They are neglected because they are not consulted or considered. By nurturing the company's best resource (its people), then productivity, creativity and profitability soar. At all times, what is done and accomplished must focus upon the customer base.

7. Effective visions honor the past and prepare for the future. There are good reasons why the company started. By weathering change and taking new turns, the organization matures. With futures constantly changing, then the art of success comes from re-examining the journey. From the subtlest nuances come gems of gold in the organization's bank.

The 7 Pitfalls to avoid include:

1. Settle short-term problems. Otherwise, they will fester and grow. Many organizations fail because they deny the problems, seek to place blame elsewhere or hope against hope that things will miraculously get better. Unsolved problems turn into larger roadblocks to growth.

2. Never let the vision lapse. Keep the vision grounded in reality through benchmarked measurements. Keep the communication open, and the people will keep the enthusiasm alive. Renew the vision every five years with a formal process, thus including newer employees, the latest in business strategies and, thus, the advantage over emerging competitors.

3. Effective visions are lived in details, not in broad strokes. If the mission evolves from the process, then so do the goals and objectives reformulate by changing tactics. The smallest tactics and creative new ways of performing them tend to blossom into grand new visions.

4. Be sure that all sectors of the organization participate. The Big Picture cannot be top-down, nor can the embracement of corporate culture be only from the bottom-up. The Visioning committee should represent all strata of the organization.

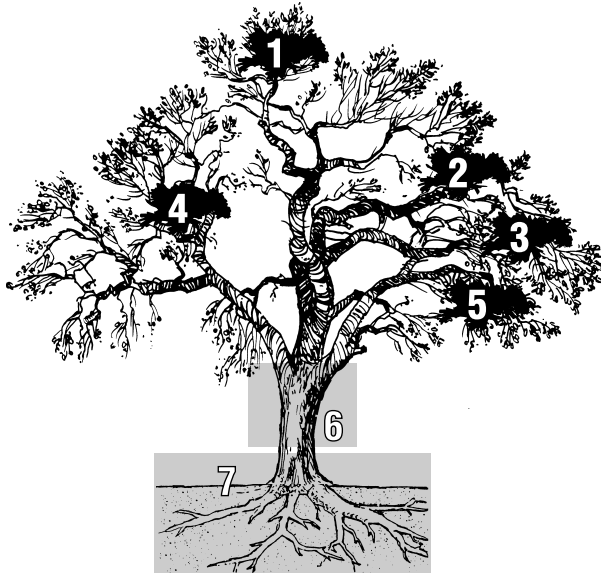
5. Periodically, test and review the process. We learn three times more from failures than from successes. Understanding why the organization ticks, rather than just what it produces, makes the really big gains possible. Success is a track record of periodic reflections.

6. Never stop planning for the next phase. The review and benchmarking phases of one process constitute the pre-work and research for the next. From careful study (not whims or gut instincts) stem true strategic planning. From a track record of planning stem organizations of exceptional and profitable visions.

7. Don't forget that change is inevitable. Research shows that change is 90% positive. Individuals and organizations change at the rate of 71% per year. The secret is in benefiting from change, rather than becoming a victim of it.

7 Levels of Visioning Programs

...determining how far organizations evolve.



Paralleling stages
in the
corporate strategy known as

THE BUSINESS TREE™

1. Was Someone's Pet Idea. A program was initiated to fit a personal or political agenda. It was sold and accepted as such. Therefore, it will be pursued partially because its motivation is transparent or limited. Visioning is more than a "program." It is a process, encompassing change, behavioral modification, focus on growth and positive reinforcement.

2. Done Because It Was Forced or Mandated. A crisis, litigation, merger, loss of market share, government edict, competition with others or a combination of outside factors caused this to begin. Visioning here is a response, not a choice. The amounts of support and participation depends upon the circumstances and the spirit with which the mandate is carried out.

3. Done for Show or Image. Some organizations think that Visioning will make organizations look good. Actually, it makes them good. Visioning is not a substitute for public relations or marketing. It guides the organization which those other functions support. Visioning must focus upon substance, not just flash-and-sizzle.

4. With Partial Support and Resources. It is accorded just enough to begin the process but not quite enough to do it right. It is either the domain of top management or is delegated to the middle of the organization. Visioning must be a team effort and well-communicated in order to hit its stride, gather additional support and sustain.

5. Well Planned. The Visioning process begins with forethought, continues with research and culminates in a Strategic Plan...including mission, core values, goals, objectives (per each key results area), tactics to address and accomplish, timeline and benchmarking criteria.

6. Well Executed. Visioning goes beyond the Strategic Plan. It sculpts how the organization will progress, its character and spirit, participation of its people and steps that will carry the organization to the next tiers of desired achievement, involvement and quality.

7. Well Followed and Benchmarked. Both the Strategic Plan and the Visioning process must be followed through. This investment is one-sixth that of later performing band-aid surgery on an ailing organization.

Areas of Visioning Focus



Paralleling stages
in the
corporate strategy known as
THE BUSINESS TREE™

7 Steps Toward Vision...

1. **Information...**What We Know, Technologies-Tasks to Gather.
2. **Education...**Teaching, Processing Information, Modeling.
3. **Learning...**Mission, Absorbing Information, Techniques.
4. **Insights...**Synthesizing Information, Values, Applicabilities.
5. **Knowledge...**Direction, Experience Bank, Inspired Thoughts.
6. **Strategy...**Actions, Goals & Objectives, Viabilities, Creativity.
7. **Vision...**Qualities, Strengths, Realizations, Big Picture Scope.

7 Levels of Organizational Visioning...

1. Internal...Planning, Controls, Reorganization.
2. Internal...Team Building, Empowerment, Mastering the Political Process.
3. Internal-External...Fiscal Management, Economic Development.
4. External...Community Input-Output.
5. External...Communications--Image, Services, Accountability.
6. Enhance the Organization's Book Value.
7. Successfully Move Forward.