Visions & Visioning

by

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Abstract: An effective *organizational vision* can direct, guide, and inspire the members of the organization as they attempt to improve organizational performance from a strategic perspective. A *vision* is defined here as *a conception of the desired distant future state of the organization*. In effect, the organizational members are saying, "*We want our organization to be different than it is now*." A *vision* can also be created for other entities such as a business unit, division, department, team, geographic region, performance category, product, service, or project. An *organizational vision statement*—consisting of text—is one example of a *vision*, but a *vision* can also be in the form of an image, a video, or a sound. A *vision* is neither necessary nor sufficient for organizational success. However, many organizations have found it useful to have some form of a *vision*. *Visioning* is defined here as *the carrying out of intentional organizational activities for creating and communicating an organizational vision*. There are a variety of *visioning* approaches used by organizations today ranging from "*very informal*" to "*very formal*." This research report answers two questions: (1) What are some of the major types of *vision statements* used by organizations today? and (2) What are some of the major *visioning* approaches used by organizations today? To answer those two questions, this research report discusses a case study analysis of three *visions*; discusses a second case study analysis of one hundred *vision statements*; discusses experiential research findings; discusses several *visioning* approaches and techniques; and lastly introduces an *Emergent Visioning System*. The research report ends with summary conclusions.

Keywords: Organizational Vision, Visioning, Visioners, Emergent Visioning System

Note: The anthropomorphic convention of ascribing human qualities to organizations is used in this research report. For example, a phrase such as "Organization X created an inspiring vision of the future." means "Some members of Organization X created an inspiring vision of the future."

I. Introduction to Visions & Visioning

An effective *organizational vision*—hereafter shortened to *vision*—can direct, guide, and inspire the members of the organization as they attempt to improve organizational performance from a strategic perspective. A *vision* is defined here as *a conception of the desired distant future state of the organization*. The concept of a *vision* is depicted in Figure 1. A *vision* can also be created for other entities such as a business unit, division, department, team, geographic region, performance category, product, service, or project to name a few.
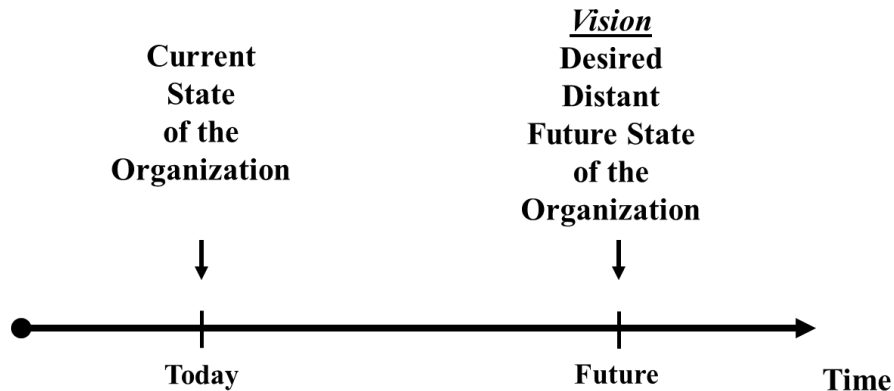

Figure 1. Vision as a Conception of the Future.

An *organizational vision statement*—hereafter shortened to *vision statement*—consists of text and is one example of a *vision*, but a *vision* can also be in the form of an image, a video, or a sound. Below is the *vision statement* that was created in 1984 at Florida Power & Light (FPL):

> "During the next decade, we want to become the best managed electric
> utility in the United States and an excellent company overall and be
> recognized as such."
> - Florida Power & Light (Hudiburg, 1991)

A *vision* represents a desired distant *end* for an organization. The *vision* is often created by several members of the organization called *Visioners*. *Visioners* are defined here as *the members of the organization who are involved in creating and communicating an organizational vision*. The *Visioners* schedule and execute intentional events (e.g., focus groups, meetings, retreats, etc.) to create and communicate the *vision*. The *means* to accomplish that *end* might not be in the *vision*.

A *vision* can be (1) a *prediction of the future* which means the organization is *accepting its fate* or (2) a futuristic *chosen end* to be achieved through the development and implementation of the *means* to accomplish that *chosen end*. The implied meaning of the latter is that the organization *aspires to be better* than it is now and plans *to do something about it*. A *target condition* is a special case of a *vision* (see, e.g., Rother, 2009). Organizational change involves actions and activities that serve as a *bridge* from the *current state* to the *desired distant future state*. The intentional creation of a *vision* is consistent with a *rational systems* approach defined by Scott (1992) as the following: "*Organizations are collectivities oriented to the pursuit of relatively specific goals and exhibiting relatively highly formalized social structures.*" The intentional creation of a *vision* also appears to be consistent with the *teleological* model of organizational change (Van de Ven & Poole, 2021):

"A *teleological* model views development as a cycle of goal formulation, implementation, evaluation, and modification of actions or goals based on what was learned or intended by the entity. This sequence emerges through the purposeful enactment or social construction of goals or an envisioned end state among individuals within the entity."

The word "*vision*" connotes the sight (*visual*) sense of the five human senses. However, a *vision* can relate and appeal to any of the five senses:

Sight: "People view us as the best in the world."
Taste: "We will make the greatest tasting pizza in the world."
Sound: "The wild applause from our fans is music to our ears when we score a goal."
Touch: "The surfaces of all our products feel as smooth as silk."
Smell: "We will offer the most pleasing fragrances in the world."

A *vision* is neither necessary nor sufficient for organizational success—but many organizations have found it useful to have some form of a *vision*. The primary focus of this research report is on the creation and communication of *vision statements*.

Visioning is defined here as *the carrying out of intentional organizational activities for creating and communicating an organizational vision*. It is typically a *social process* that involves multiple members of the organization (see, e.g., Hudiburg, 1991). There are a variety of *visioning* approaches used by organizations today ranging from "*very informal*" to "*very formal*." Very little research has been conducted on the different types of *vision statements* or *visioning* approaches.

This research report answers two questions: (1) What are some of the major types of *organizational vision statements* used by organizations today? and (2) What are some of the major *visioning* approaches used by organizations today? To answer these two questions, this research report discusses a case study analysis of three *visions*; discusses a second case study analysis of one hundred *vision statements*; discusses experiential research findings; discusses several *visioning* approaches and techniques; and lastly introduces an *Emergent Visioning System*.

Vision statements often explicitly mention or implicitly suggest one or more organizational performance categories such as *Health & Safety*, *Product & Service Quality*, *Financial*, etc. Some of the more common organizational performance categories are depicted in Figure 2.
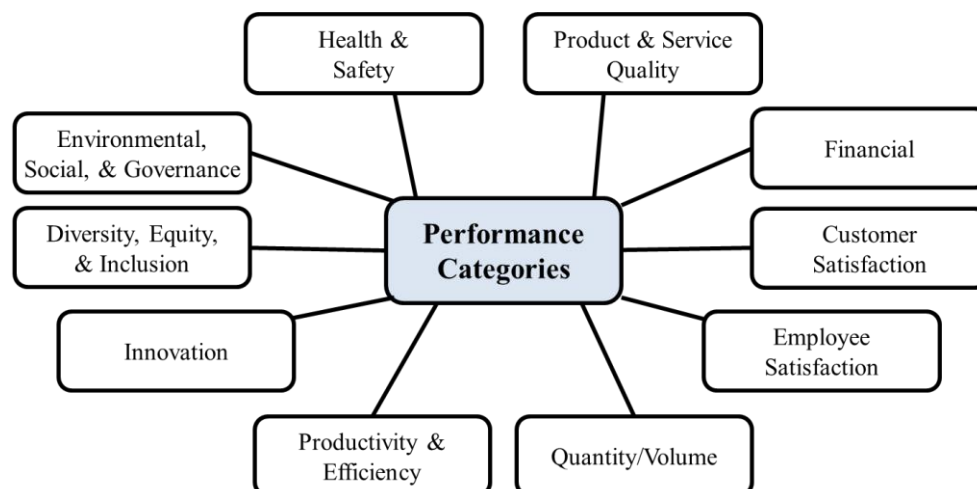

Figure 2. Organizational Performance Categories.

A *vision* is one of four key *foundational elements* commonly addressed during strategic planning (see, e.g., Johnson *et al.*, 2017; Liedtke, 2019; and Osada, 1998)—the other *foundational elements* are *mission*, *philosophy*, and *values*. These are depicted in Figure 3. A *mission* describes why the organization exists. A *philosophy* consists of one or more statements that describe the collective philosophy of the members of the organization. *Values* are words or statements that describe the deeply-held beliefs of the members of the organization. *Values* are used to guide member behavior (e.g., *Integrity*, *Teamwork*, *Respect for People*, *Inclusion*, etc.)

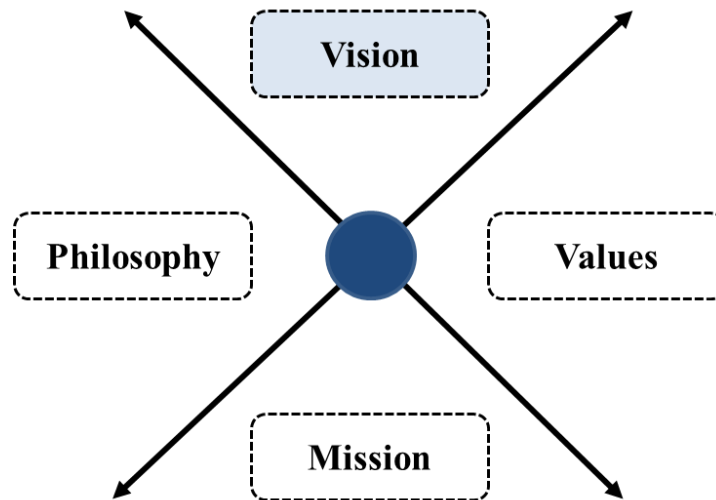**Figure 3. Four Key Foundational Elements.**

Some organizations have a hierarchy and/or creation sequence of strategic planning items (see, e.g., Deming Prize Committee, 2018; JSQC, 2017; Liedtke, 2019; and Osada, 1998). The *vision statement* is created after the creation of the *mission*, *philosophy*, and *values* in Figure 4 below.
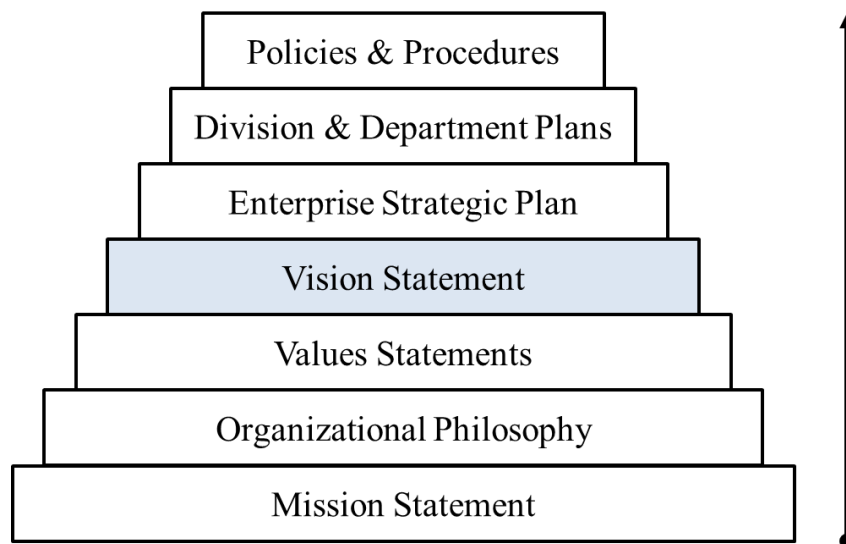

Figure 4. Hierarchical Creation Sequence (*bottom* to *top*).

A *vision* often *lies beyond* the formal planning horizon. It is common for organizations to create and implement a long-term plan, mid-term plan, and an annual plan. One of the aims of these *plan implementations* is to *move the organization towards its vision*. This is depicted in Figure 5.
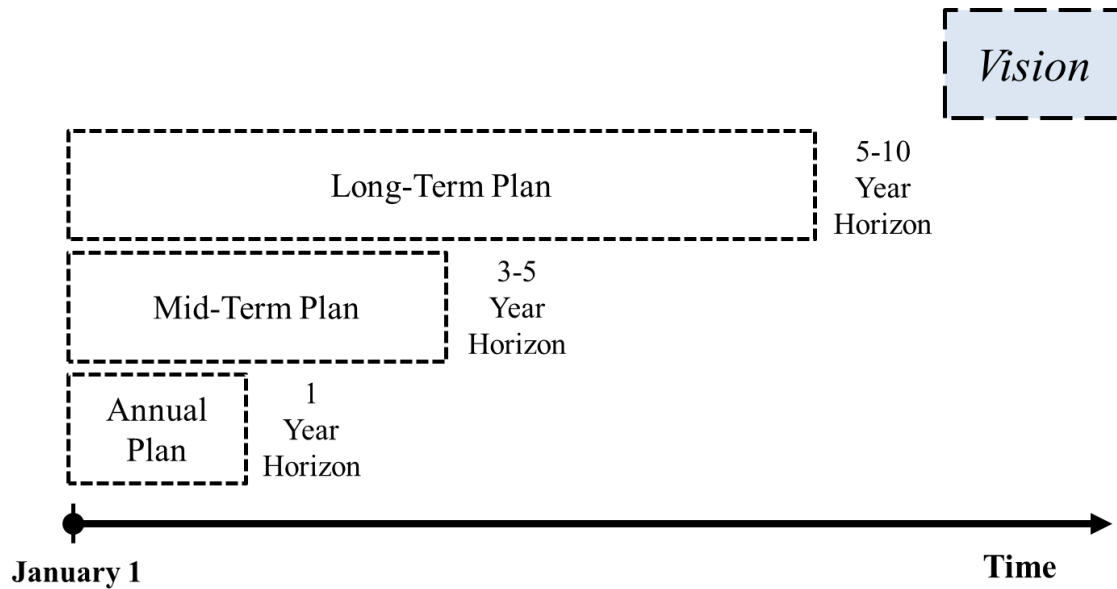
Figure 5. Vision Lies Beyond the Formal Planning Horizon.

A *vision* can direct the creation of linked strategic planning items. A Tree Diagram depicts this in Figure 6 (see, e.g., JSQC, 2017; and Liedtke, 2017 & 2019). Priority Issues and Priority Opportunities are selected in light of the mission, philosophy, values, and *vision*. A Strategic Objective is then developed for each Priority Issue and Priority Opportunity. Strategies are then developed for each Strategic Objective. Finally, Action Plans are developed for each Strategy.

Figure 6. Vision to Action Plans (*left* to *right*).

What follows are eleven additional concepts related to *visions*:

Individual vs. Group: A *vision* can be created for an **individual** or **group** (e.g., an *organization*).
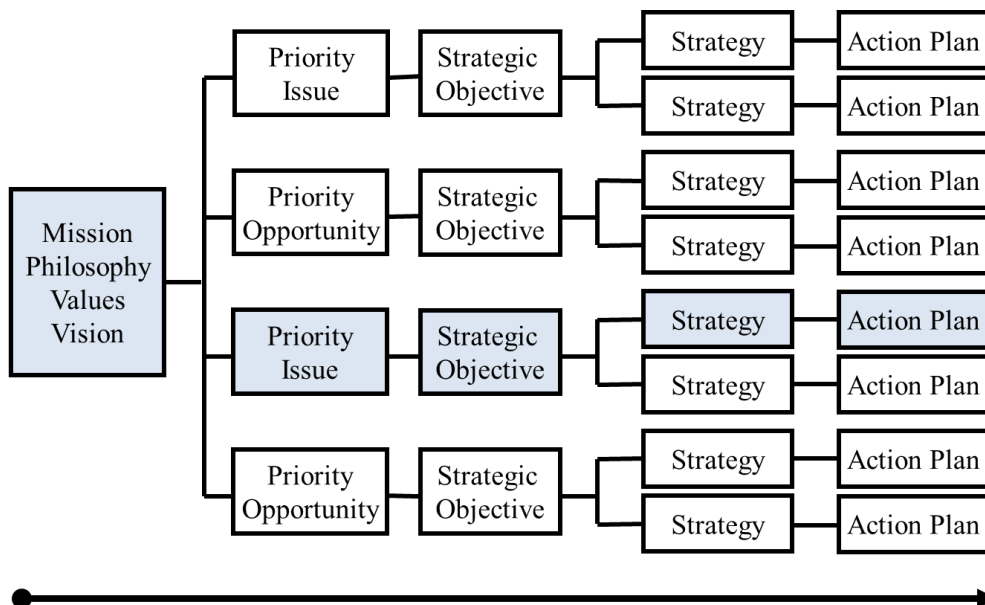
Content & Form: A *vision* has **content** and can assume a variety of different **forms**.

Aspiration: A *vision* tends to be **aspirational**—and it is also sometimes **inspirational**.

Attainability: A *vision* can be perceived as **attainable** (i.e., realistic, feasible, etc.) or **unattainable** (i.e., unrealistic, infeasible, etc.). The following *vision* would probably be perceived as unattainable: "We will build a city inhabited by humans on Jupiter within the next three years."

Use Cases: A *vision* can be created for an **organizational unit** (enterprise, network, platform, business unit, division, department, plant, office, project team, task force, etc.); an **organizational performance category** (*Health & Safety*, *Quality*, *Customer Satisfaction*, etc.); a **geographic region** (nation, state, county, city, neighborhood, etc.); a **product** or **service**; or an **individual**.

Roles: A *vision* can perform many roles: **inspire** the members of an organization; **direct** the members of an organization; **guide** the members of an organization; **align** all the organizational units of an organization; **focus** the members of an organization; help the members of an organization **prioritize**; help the members of an organization **allocate resources;** and **serve as a standard** for evaluating organizational performance.

Conflicting Visions: Different subgroups in the organization can possess **conflicting** *visions* which can divide the members of an organization rather than unite them.

Asset: A *vision* can potentially be an **intangible asset** for an organization (see, e.g., Itami, 1987). A *vision's* benefits or ultimate value cannot be found in an organization's financial statements.

Constraint: A *vision* can potentially **constrain** the members of an organization (see, e.g., Weick, 1985). Once created—a *vision* triggers a cascading sequence of bounded decisions and actions.

Positivity: Not all *visions* are **positive**. There have been numerous examples of *sinister visions* throughout history which will not be mentioned here. George Orwell (1949) described a *dystopian vision of the future* in his classic fictional novel titled, *1984*.

Timing: Timing is important when creating and communicating a *vision*. Lou Gerstner, former CEO of IBM, convened a press conference in July of 1993 after his first 100 days as CEO. He made the controversial statement (Gerstner, 2002): "What I'd like to do now is put these announcements in some sort of perspective for you. There's been a lot of speculation as to when I'm going to deliver a vision of IBM, and what I'd like to say to all of you is that the last thing IBM needs right now is a vision." Fast forward to today, Jane Fraser—who became the CEO of Citigroup in March of 2021—is in the process of creating a vision (Benoit, 2021): "The bank [Citigroup] is planning an investor day for early 2022, where Ms. Fraser will spell out in further detail her vision for the bank, the first such presentation for Citigroup since 2017."

There are numerous potential pitfalls to avoid when *visioning* (see, e.g., Liedtke, 1995). Here are some of those potential pitfalls:

Potential Pitfalls
* *Visioning* is viewed as a "*check the box*" activity (i.e., cursory development).
* There is no clear *visioning* process.
* There is no preparation or data analysis.
* Only a few people are involved in the *visioning* process.
* Everyone involved in the *visioning* process is "*thinking the same*."
* The *Visioners* care more about the style of the *vision* than its substance.
* The *vision* is not aligned with the mission, philosophy, and/or values.
* The *vision* is ambiguous.
* The *vision* lacks imagination and originality (e.g., "*We will be the best bank in the world.*").
* There isn't consensus on the *vision* or a collective commitment to attain it.
* The *vision* is poorly communicated to the members of the organization.
* The *vision* is only well-understood by a few members of the organization.
* The *vision* isn't used once it has been communicated.
* There is no follow-up once the *vision* has been communicated.
* There is no periodic evaluation of progress towards the *vision*.

II. Analysis of Three Organizational Visions

There are numerous examples of *visions* in history. **Florence Nightingale** (Nightingale, 2020) put forth in 1859 a detailed *vision* of the role and responsibilities of nurses in health care. She served as a nurse in the Crimean War (1853-1856) and was one of the first statisticians in the health care profession. Her *visionary* thoughts still guide the practice of nursing today (see, e.g., Johnson, 2017). The **Reverend Dr. Martin Luther King, Jr.** delivered his iconic '*I Have a Dream*' speech at the *March on Washington* on August 28, 1963 (King, 1963). Excerpts of his historic speech are still widely quoted and the speech continues to be studied and valued today. Here is one of the more commonly cited excerpts: "*I have a dream that my four little children will one day live in a nation where they will not be judged by the color of their skin but by the content of their character.*" Dr. King's speech was passionately delivered, profound, and powerful. Three *visions*— representing three insight-stimulating case studies (Yin, 2017)—were selected for in-depth analysis to generate insights on *visions*. What follows is a case study analysis of three *visions*: (1) an excerpt from President John F. Kennedy's 1961 speech to a Joint Session of Congress, (2) Florida Power & Light's *vision statement* from 1984, and (3) a *vision video* by Komatsu Limited.

Vision #1: **Excerpt from President John F. Kennedy's Speech to a Joint Session of Congress**

One of the most memorable *visions* in history was embedded in a speech—The *Moonshot Speech*—delivered by President John F. Kennedy to a Joint Session of Congress on May 25, 1961:

> "I believe that this nation should commit itself to achieve the goal, before this
> decade is out, of landing a man on the Moon and returning him safely to the Earth."
> - President John F. Kennedy, May 25, 1961 (Kennedy, 1961)

In 1961, the United States was far from having the necessary capabilities to attain the *vision*. President Kennedy appeared passionate, energetic, and confident during the delivery of the speech. The motivation for the *vision* was in part driven by the Cold War Space Race against the Soviet Union according to Ted Sorensen who was involved in pre-speech research and the writing of the speech (Sorensen, 2008). President Kennedy later repeated similar themes during subsequent speeches including his famous Rice University speech on September 12, 1962. He repeatedly *made the case* for attaining the *vision* and *promoted it* with confidence and passion. The *Joint Session* speech excerpt was thirty-one words in length. It was reportedly perceived as *bold* and *wildly ambitious* by some and *impossible to attain* by others. President Kennedy was assassinated on November 22, 1963 and so he did not witness the attainment of his *vision*. The endeavor was continued after his death by President Johnson and the *vision* was attained during President Nixon's presidency. President Kennedy's *vision* excerpts from the speech are shown in Figure 7.

"I believe that this nation should commit itself to achieve the goal, before this decade is out, of landing a man on the Moon and returning him safely to the Earth."

Vision Statement Excerpt	Idea/Theme/Concept
I believe	**Personal Belief or Opinion**
that this nation	**National or Country Perspective**
should commit itself	**Recommending a Commitment**
to achieve the goal	**Achievement or Goal Orientation**
before this decade is out	**Time Horizon and Deadline**
of landing a man on the Moon	**Event #1: Human on the Moon**
and returning him safely	**Event #2: Return the Human Safely**
to the Earth	**Starting Point, Origin, or Home**

Figure 7. Components of President Kennedy's *Vision*.

As was mentioned earlier, the United States did not have the necessary capabilities to attain the *vision* at the time of the *Moonshot Speech* in 1961. Also, there were a number of major challenges to overcome in order to attain the *vision* (see, e.g., Collins, 1974; and Sorensen, 2008). Some of the *necessary capabilities* and *major challenges* are shown in Figure 8. Many people believed that the major challenges were impossible to overcome. It is clear that President Kennedy's *vision* helped contribute to the mobilization of people, prioritization of resources, and the acceleration of scientific discovery. The eventual *outcome* was the *attainment of the vision* by the *end of the decade*. In practice, knowing the *necessary capabilities* and *major challenges* can help *Visioners* identify the important gaps that must be successfully addressed in order to attain the *vision*.
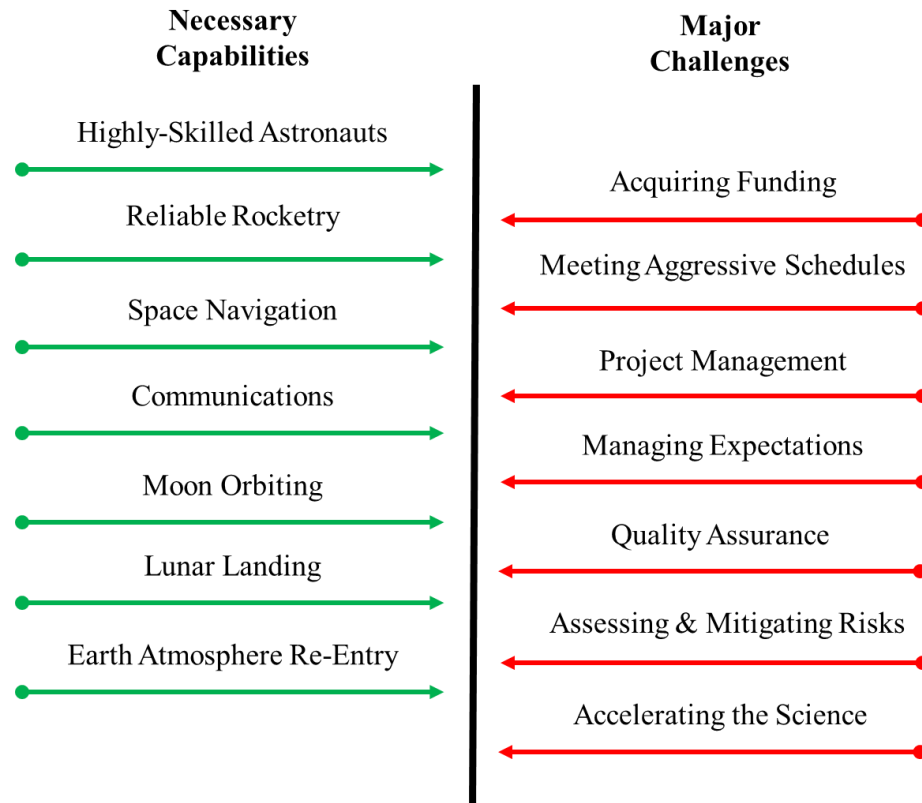
Necessary Capabilities	Major Challenges
Highly-Skilled Astronauts	
	Acquiring Funding
Reliable Rocketry	
	Meeting Aggressive Schedules
Space Navigation	
	Project Management
Communications	
	Managing Expectations
Moon Orbiting	
	Quality Assurance
Lunar Landing	
	Assessing & Mitigating Risks
Earth Atmosphere Re-Entry	
	Accelerating the Science

Figure 8. Necessary Capabilities & Major Challenges.

The Apollo 11 spacecraft from NASA was launched from Kennedy Space Center on July 16, 1969 with crew members Edwin "Buzz" Aldrin, Neil Armstrong, and Michael Collins. Eagle— the lunar module—landed on the surface of the Moon on July 20, 1969 ("*Eagle has landed!*"). Neil Armstrong became the first human to set foot on the Moon at 10:56 p.m. EDT on July 20, 1969 whereupon he stated: "*That's one small step for a man, one giant leap for mankind.*" Buzz Aldrin shortly thereafter became the second human to set foot on the Moon. Michael Collins remained with the spacecraft in Moon orbit. The three astronauts returned to the Earth on July 24, 1969 having attained President Kennedy's Moon *vision* (see, e.g., Collins, 1974).

The successful Apollo 11 Moon Mission resulted in several iconic visual images: a human boot print on the surface of the Moon; a human standing on the surface of the Moon; a United States flag on a flag pole planted on the surface of the Moon; the surface of the Moon with the Earth in the background; the landing module on the surface of the Moon; the space capsule floating in the ocean at the end of the mission; and the three astronauts emerging from the space capsule. What began as an articulated bold *vision* in 1961 became a reality by the end of the decade.

There are several contemporary space *visionaries*—the most well-known of which are Elon Musk of SpaceX (also Tesla), Jeff Bezos of Blue Origin (also Amazon), and Richard Branson of Virgin Galactic (also Virgin Group). All three have bold ambitions for the human exploration of space including space tourism (Davenport, 2018). Elon Musk is especially intent on establishing an inhabited human base on Mars. One of the Apollo 11 astronauts and the second human to set foot on the moon—Buzz Aldrin—also has a *vision* for humans on Mars (Aldrin, 2013). This case is an excellent example of a *desired distant future state* that was attained through *deliberate efforts*.

Vision #2: Florida Power & Light's (FPL) Organizational Vision Statement from 1984

The Florida Power & Light Company (FPL) is currently the largest energy company in the U.S. as measured by retail electricity produced and sold serving more than 5 million customer accounts and supporting more than 11 million Florida residents (FPL, 2021). FPL is headquartered in Juno Beach, Florida. It is a subsidiary of NextEra Energy, Inc. (New York Stock Exchange: NEE). FPL won the prestigious Deming Prize in 1989 (JUSE, 2021). The CEO of FPL at that time was John Hudiburg. He described the situation facing FPL's senior executives in 1984 (Hudiburg, 1991): "This is where we were when we began to take a very deep look at ourselves. We wanted to figure out just who we were and what we wanted to be—in short, what our vision should be—and to try to develop some long-range plans for our future progress." The *vision statement* that emerged from the FPL *visioning* process in 1984 was the following:

> "During the next decade, we want to become the best-managed utility in the United States and an excellent company overall and be recognized as such."
> - Florida Power & Light (Hudiburg, 1991)

According to Hudiburg (1991): "We thought through literally every word in that vision, which was designed to be primarily for internal communication to our employees to let them know what management thought the company was all about. But of course we recognized that it would be communicated outside the company as well, and we were concerned that it convey to both groups a realistic but ambitious view of where we thought we should be headed." Excerpts from the FPL *vision statement* are shown in Figure 9. This was a classic case of an aspirational *vision* that was created through a highly social and deliberative process that was eventually attained.

> "During the next decade, we want to become the best-managed electric utility in the United States and an excellent company overall and be recognized as such."

Vision Statement Excerpt	Idea/Theme/Concept
During the next decade	**Time Horizon and Deadline**
we want to become	**The Process of Becoming**
the best-managed	**Aspiration #1**
electric utility	**Industry Scope**
in the United States	**National and Country Scope**
and an excellent company overall	**Aspiration #2**
and be recognized as such	**Result: Recognized By Others**

Figure 9. Excerpts from FPL's 1984 Vision.

Vision #3: Komatsu's Video Vision – "Komatsu future 203X"

Komatsu Limited is a global farm and heavy construction machine manufacturer headquartered in Tokyo, Japan with over 60,000 full-time employees (Komatsu Limited, 2021). Komatsu was established in 1921 and is currently celebrating its 100th Anniversary. The company is listed on the Frankfurt (Germany) Stock Exchange with the symbol KOMA. Komatsu is known for *dantotsu* products, services, and solutions which means *unique and unrivaled* (Sakane, 2010).

Komatsu has a long history of *excellence*. Komatsu Manufacturing Company, Ltd. won the Deming Application Prize (now *Deming Prize*) in 1964 and later won the even more prestigious Japan Quality Control Prize (now *Deming Grand Prize*) in 1981. More recently, PT Komatsu Indonesia—a Komatsu overseas affiliated company headquartered in Jakarta, Indonesia—won the Deming Prize in 2018. PT Komatsu Indonesia stated its *vision* (Deming Prize Committee, 2018): "To become indispensable construction equipment and machinery company which is valuable for the nation and its stakeholder (customer, business partner and employees)." PT Komatsu Indonesia also presented a "*House Framework*" for Management Policy items (Deming Prize Committee, 2018): *Vision* (the *roof* of the house), Mission, Objective, and Midterm Strategy.

Komatsu created a *vision video* (Komatsu, 2021) titled "*Komatsu future 203X*" that visually shows—and verbally describes—the desired distant future state of Komatsu and *its world*. Komatsu used animation, images, text, and audio to effectively communicate its *vision*. The video appeared to be aimed at customers and workplaces. Here is a transcription of the video narration:

> "Every workplace around the world is digitized. People, equipment, material, and terrain can all be converted into data. Connecting the data digitally on an open platform gives us visibility on the entire operation and together with our partners and leading technology we are able to gain insights into how best to address challenges in the workplace. Creating a safe, productive, smart, and clean workplace connected digitally will bring you higher operational efficiency and help us create a carbon neutral future. Mining workplace will be safe, environmentally responsible, and highly productive supporting society's growing needs. Construction workplace will be safe, productive, smart, and clean connected digitally. Forestry workplace will become a full circle of reviving forests and using its resources enabling forests to thrive. Agricultural workplace will better support the food system by enhancing fertility of farmland and efficiency of crop production. Industrial machinery workplace will realize next generation factory lines that are clean, energy saving, and trouble free. Komatsu manufacturing workplace will be environmentally responsible and highly productive directly linked with customers and partners by data. Creating value together through a manufacturing and technology innovation at the workplace. This is our mission as we aspire to empower a sustainable future where people, business, and the planet can thrive together as your reliable partner at the workplace."

Some of the themes in the form of *key words* in the narration include the following: Workplace, Performance, Data, Digital, Connected Digitally, Open Platform, Manufacturing & Technology Innovation, Environmentally Responsible, Sustainable Future, Reliable Partner, and Creating Value Together. These are depicted in Figure 10. This case represents an excellent example of how an organization can *go beyond* a traditional *vision statement* by effectively using a combination of *sights* and *sounds* in the form of a video.

Komatsu future 203X	
Vision Video Excerpt	**Idea/Theme/Concept**
Workplace	**Gemba - Where Work Occurs**
Performance	**Safe, Productive, Smart, etc.**
Data	**Critical Resource**
Digital	**Digitization**
Connected Digitally	**Digitized Relationships**
Open Platform	**Shared/Common Infrastructure**
Manufacturing & Technology Innovation	**Means to Ends**
Environmentally Responsible	**Commitment to Environment**
Sustainable Future	**Enduring Success**
Reliable Partner	**Consistent & Trustworthy Partner**
Creating Value Together	**Joint Creation of Value**

Figure 10. Components of Komatsu's Video Vision.

An *emergent interpretive framework* was created to organize the ideas. It is shown in Figure 11.
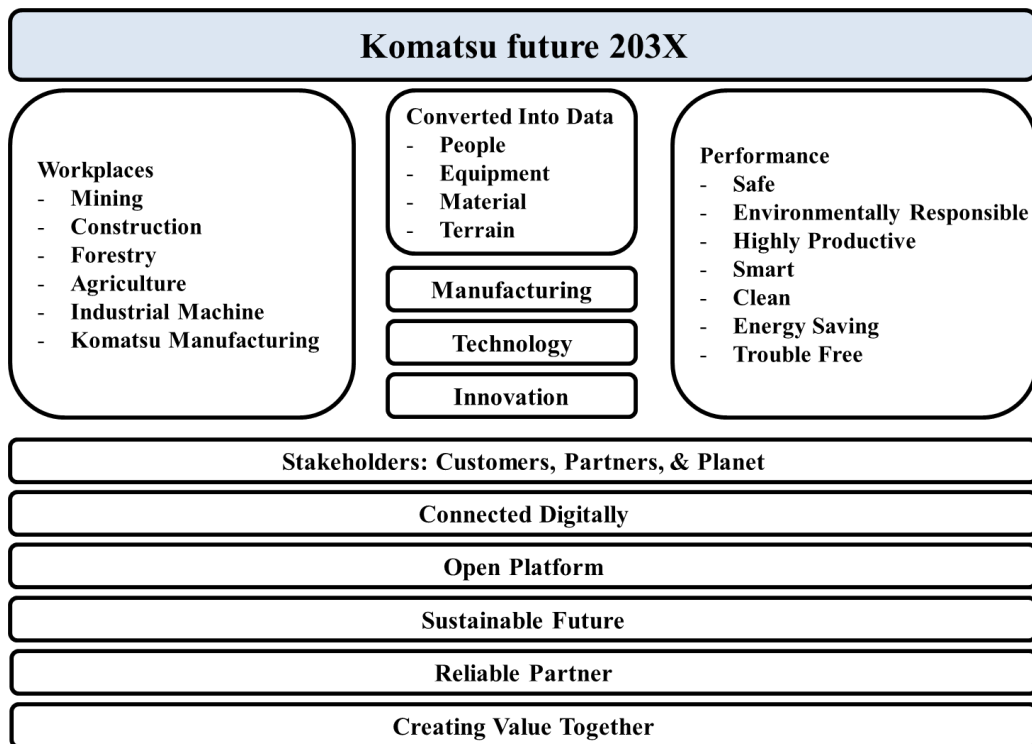

Figure 11. Major Components of Komatsu's Video Vision.

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The *visions* covered a span of 60 years (1961 to 2021). Several new insights emerged from within-case and cross-case analyses of the three *visions*. Here are some of those insights.

* There were different motivations for creating the *visions*.
* The *visions* were created in different contextual situations.
* The *visions* had unique perspectives: Country (JFK), Company (FPL), and Customer (Komatsu).
* The *visions* had different target audiences.
* The *visions* represented different forms: *Visionary* Speech, *Vision* Statement, and *Vision* Video.
* The *visions* all had a clear future orientation.
* The *visions* were aspirational and inspirational.
* Attaining each *vision* required the development of very specific necessary capabilities.
* Attaining each *vision* required overcoming major challenges.
* The *visions* were communicated differently.

III. Analysis of 100 Organizational Vision Statements

The form and content of one hundred (100) *vision statements* (cases) were analyzed using the case study research method (Yin, 2017) to identify the major *vision statement* types used by organizations today. The set of one hundred organizations represented multiple continents, countries, and industries. The organizations also varied by size, type, and product/service mixes. First, the *popular words* contained in the *vision statements* will be presented and discussed. Second, some of the *characteristics* of the *vision statements* will be presented and discussed. Lastly, the *major types* of *vision statements* will be presented and discussed.

1. Popular Words

There were a number of words—and phrases—that were popular in the set of one hundred *vision statements*. Some of the popular words and phrases will now be presented and discussed. The *examples* are fictional composites of actual *vision statements*.

Will Be & Will Become: These words suggest the intent to *become something different*.
>   **Example:** "We will become the best and most highly-respected bank in the world."

Best, Greatest, Finest, Premier, Dominant, Leading, & Leader: These words communicate the desire to *reach the highest possible aspiration level* for the organization.
>   **Example**: "We will be the leading automobile manufacturer in the world."

World Class, Top 10, Exceptional Value, & Excellence: These words emphasize a *high aspiration level* for the organization, but not necessarily the *best*.
>   **Example**: "We will provide world class services to our customers every day."

Most Prestigious, Most Recognized, & Most Respected: These words emphasize the desire for *positive perceptions* of the organization from those who are external. What others think, matters.
>   **Example:** "We will become the most highly-respected insurance company in the world."

Preferred & First Choice: These words emphasize the desire to be the most *wanted* organization.
>   **Example:** "We will be the preferred hospital in the state."

By & Through: These words function to introduce the *means* for accomplishing one or more *ends*.
Example: "We will become the best in the industry by focusing on quality and innovation."

Every: This word emphasizes *reliability* and *consistency*.
Example: "We will put a smile on the face of every customer that we serve every day."

Innovation, Innovative, Transform, & Transformation: These words emphasize *radical change*.
Example: "We will offer our customers a stream of innovative *new to the world* products."

Indispensable & Needed Most: These words express the desire to be *needed*, *necessary*, or *vital*.
Example: "Our company will become an indispensable partner of our customers."

Trust & Trusted: These words obviously express the desire for the organization to be *trusted*.
Example: "We will earn the trust of our customers through high-quality and reliability."

2. Characteristics

An analysis of the one hundred *vision statements* revealed several characteristics (or *variables*). They represent "*things to consider*" when creating a *vision statement*. Some of the items are the *"start"* of defining a "*high-quality*" *vision statement*. Creating this definition is outside the scope of this research report. Some of the *characteristics* are shown in Figure 12.

Vision Characteristic	Potential Aims
Memorability	The vision statement is easy to remember.
Clarity	The vision statement is clear.
Compellability	The vision statement is compelling.
Conciseness	The vision statement is straight and to the point.
Originality	The vision statement is creative and unique to the organization.
Attainability	The vision statement seems attainable.
Length	The vision statement is of adequate length.
Mention of Stakeholders	The vision statement mentions one or more stakeholders.
Mention of Geography	The vision statement mentions a geography.
Mention of Industry	The vision statement mentions an industry.
Time Horizon	The vision statement mentions a time horizon.
Structure	The vision statement has an appropriate structure.

Figure 12. Vision Statement Characteristics.

3. Major Types

An analysis of the one hundred *vision statements* revealed several major types. We will first present and describe four types related to *ends* and *means* and then we will present and describe four other types. The *examples* are fictional composites of actual *vision statements*.

Ends (the *What*) and/or Means (the *How*) Types

Ends Only: This type of *vision statement* suggests one or more *ends* (i.e., goal, target, etc.), but does not explicitly mention any *means* to accomplish the *ends*.
  Example: "We will have the largest market share in the industry by 2025."

Ends & Means – Primary Emphasis on the Ends: This type of *vision statement* contains both *ends* and *means*, but the primary emphasis is on the *ends*.
  Example: "We will be recognized as the best utility company in the world by tirelessly
     focusing on meeting the needs of our customers."

Ends & Means – Primary Emphasis on the Means: This type of *vision statement* contains both *ends* and *means*, but the primary emphasis is on the *means*.
  Example: "We will improve quality every day and business results will follow."

Means Only: This type of *vision statement* was rare and consisted only of *means*.
  Example: "Our team will approach every customer moment with integrity and kindness."
  Note: Storm (1994) discussed the importance of focusing on the *means*: "The first and
     most important question is never WHAT – always HOW."

Four Other Types

There were several other identifiable types of *vision statements* that were not mutually exclusive with the *ends-means* types that were just described. Four will be mentioned here:

Be #1: *Vision statements* with the clear aspiration to be the *best*, *greatest*, *leader*, *premier*, etc.
  Example: "We will be the best hospital in the country."

Quantitative: *Vision statements* with numerical *ends* (goals, targets, etc.).
  Example: "30/10/2025" - means $30 Billion in Sales and $10 Billion in Profit by 2025.

Event Occurrence: *Vision statements* whose attainment is based on one or more events occurring.
  Example: "Our products will be in every home in the United States by 2030."

Components: *Vision statements* whose structure consists of multiple components.
  Example: "Our **customers** will be extremely satisfied.
     Our **employees** will love their work.
     Our **shareholders** will be pleased with our growth and profits.
     Our **suppliers** will value working with us.
     Our **regulators** will view us as the most trustworthy in the industry."

We can see from the preceding analyses that there are many different types of *vision statements* both in terms of form and content. One clear implication is that *Visioners* must make choices and these choices have implications. The eventual *vision statement* that is created and communicated by the *Visioners* requires much thought and consideration. Knowledge of the *characteristics* and *types* can help *Visioners* select the *form* of the *vision statement*. Knowledge of the *popular words* can help *Visioners* create *vision* content.

One advantage of possessing this knowledge is that *Visioners* are in a better position to be creative and original. Many of the one hundred *vision statements* were generic and lacked originality. For example, one common generic *vision* was the following: "*We will become the best hospital/bank/company in the state/country/world.*" This type of *vision statement* begs many questions: (1) Why?, (2) What does it mean to *be the best*?, (3) How is this different than others?, and (4) How will this *vision* be used by members of the organization in their day-to-day work?

IV. Visioning Approaches & Techniques

Visioning was defined earlier as *the carrying out of intentional organizational activities for creating and communicating an organizational vision*. The *visioning* processes used by organizations today range from "*very informal*" to "*very formal.*" It tends to be a social process (see, e.g., Broehl, 1998; Hudiburg, 1991; and Sibbet, 2013) with the exception of the situation where the leader of the organization unilaterally creates and announces the *vision*. A *Basic Visioning Process* will first be discussed. Several *visioning* approaches and techniques will then be discussed including the application of the PDSA Cycle for *visioning*. Finally, the insights and lessons learned from experiential research in the form of a *vision quest* will be discussed.

Two informal *visioning* situations will be mentioned here—although they are outside the scope of this research report. The first situation is when the founder of a company (i.e., an *entrepreneur*) experiences a *flash of insight* and the *vision* spontaneously and instantaneously appears (i.e., is *created*)—"*My vision just popped into my head.*" This *vision* is *idiosyncratic* and it might be difficult for the founder to explain its meaning and significance to others. The founder in this situation possesses *tacit knowledge*. Polanyi (1966) described *tacit knowledge* as "*we can know more than we can tell.*" The founder of the company thoroughly understands the *vision*, but the other members of the organization may never understand the *vision*—"*You had to be there . . . but you weren't.*" The second situation is when the *vision* emerges unintentionally over time – "*It seems clear now - this is our vision.*" The *vision* in this case could involve *shared tacit knowledge*.

Many organizations design and execute a formal process for creating and communicating a *vision*. This situation involves scheduled events like focus groups, workshops, retreats, and town hall meetings. Here are some working assumptions related to a formal *visioning* process:

Assumptions:
1) A decision has been made to create and communicate an *organizational vision*.
2) A group of people—referred to as the *Visioners*—have been assigned the task.
3) The *Visioners* will decide whom else to involve in the *visioning* process.
4) The *Visioners* will schedule formal activities and events for working on the task which could include focus groups, meetings, workshops, retreats, etc.
5) The *Visioners* will attempt to conduct the activities and events according to the schedule.
6) The *Visioners* may or may not have the decision rights (i.e., the *final say* on the *vision*).

Basic Visioning Process

    Visioning at a high level can be depicted using a linear flowchart. A *Basic Visioning Process* is depicted in Figure 13. The process is initiated (Step 0) by a decision to create and communicate a *vision*. The *Visioners* then (1) *Prepare to Create a Vision*, (2) *Create the Vision*, and (3) *Communicate the Vision*. Post-communication of the *vision* involves follow-up activities which are outside the scope of the *visioning* definition and this research report.
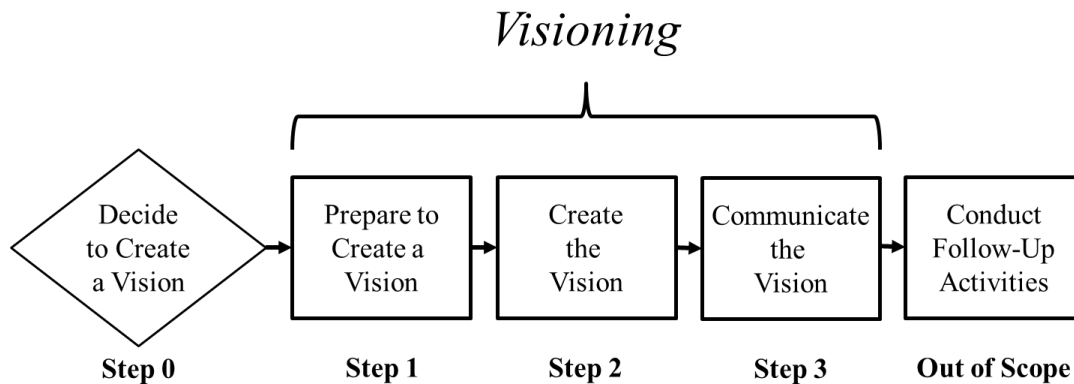
Visioning

Figure 13. Basic Visioning Process.

The steps of the *Basic Visioning Process* will now be described.

Step 0. Decide to Create a Vision: The *visioning* process is initiated when one or more members of the organization decide to either create a new *vision* or revise the existing *vision*. This can be thought of as *vision intent*—the "*Why*?" The motivation for the decision could be a change in the business environment, new competitive threats, a new disruptive technology, a new CEO, or a new aspiration to name a few. The creation and communication of the *vision* will either be *standalone activities* or activities embedded in another organizational process such as strategic planning. It is important to understand and clarify how the *vision* is expected to be used in the organization (i.e., *use cases*). The *visioning* process can then be *designed* with those use cases in mind. Also, it is important to understand the mindset of those making the decision. What are their motives? Are they serious? Are they enthused? Are they committed to attaining the eventual *vision*?

Step 1. Prepare to Create a Vision: The first step depicted in the *Basic Visioning Process* involves preparation activities. These activities might include selecting the *Visioners*, scheduling events, developing preparation assignments, communicating the approach and schedule, touring operations, conducting customer focus groups, benchmarking other organizations, and conducting various types of analyses (e.g., economic, environmental, SWOT, market, customer, stakeholder, industry, competitor, network, product/service portfolio, political, regulatory, technology, capability, & supply chain). This step might also involve requesting and gathering ideas (i.e., *input*) from others members of the organization. Some organizations formalize their predictions and/or assumptions about the future and review the existing mission, philosophy, and values. One important question is the following: "Who does our organization want to serve in the future and what will be their needs?" In other words, "What will be the future needs of our future customers?"

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Step 2. Create the Vision: The second step depicted in the *Basic Visioning Process* involves activities related to creating the *vision*. Again, *visioning* tends to be a formal social process (see, e.g., Broehl, 1998; Hudiburg, 1991; and Sibbet, 2013) and so it is common for an event schedule to be created consisting of focus groups, meetings, workshops, retreats, etc. The implied aim is "*to get the right people with the right mindsets in the right rooms with the right equipment at the right times.*" We could imagine other "*rights*", but those are some examples. Some organizations have the *Visioners* travel to an inspiring off-site location. However, this is neither necessary nor sufficient for creating an effective *vision*. These *vision* creation experiences are shared experiences by the *Visioners* which will be shown later to have important implications. What follows are descriptions of three different models for creating and communicating a *vision*.

Down Once Model – The *Visioners* create the *vision* during one or more *intentional activities* and then they communicate the *vision* to the other members of the organization. The *vision* is then used for various purposes throughout the organization (use cases). This is depicted in Figure 14. The baseball image symbolizes a communication process called *catchball*. In this model, there is no involvement of other members of the organization and the *vision* is not tested.
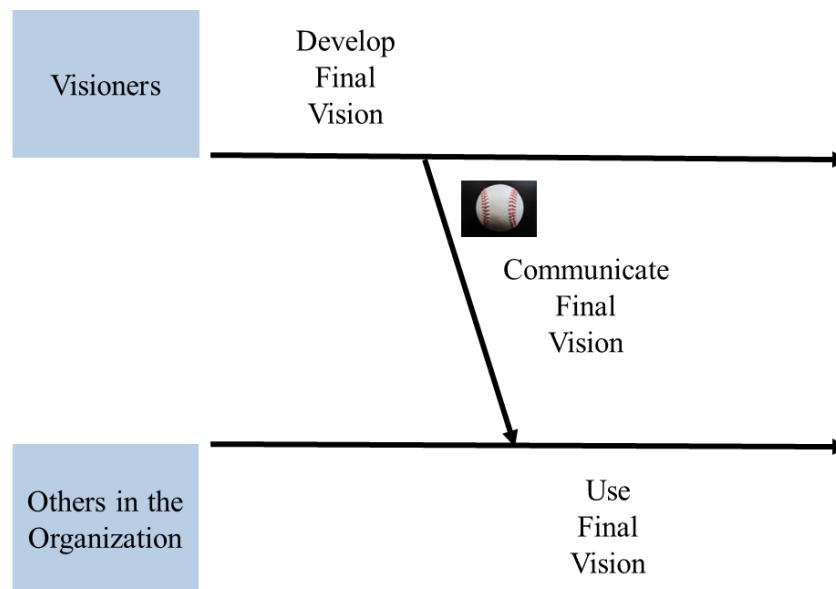

Figure 14. Down Once Model.

Up-Down Once Model – The *Visioners* receive input from other members of the organization. The *Visioners* then create the final version of the *vision* and communicate it to the other members of the organization. The *vision* is then used for various purposes throughout the organization (use cases). This is depicted in Figure 15. Other members of the organization are involved in the process in this model in addition to the *Visioners*—they provide input to the *Visioners* on the *vision*. There is no testing of the *vision* with the use of this model.
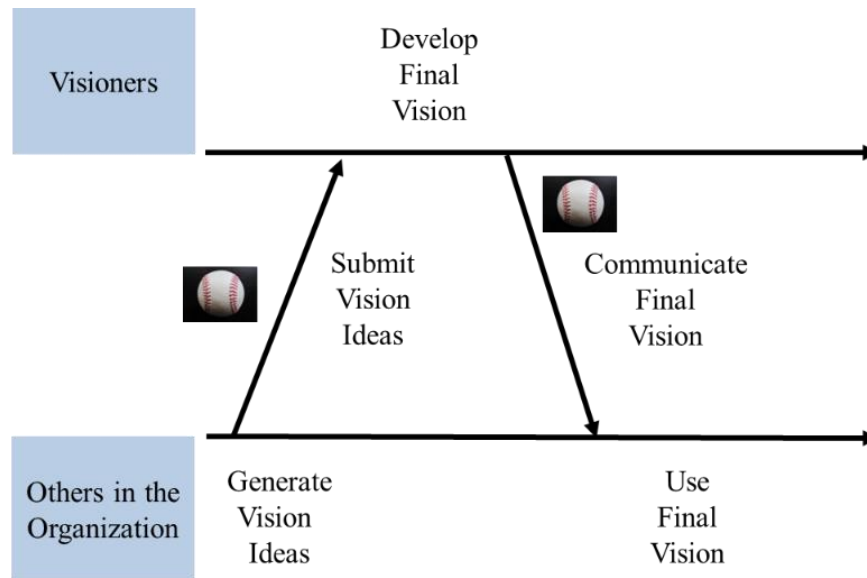
Figure 15. Up-Down Once Model.

Up-Down Twice Model – The *Visioners* receive input from other members of the organization. The *Visioners* then create a draft *vision* which they then share with others in the organization. Those other members of the organization review the draft *vision* and then submit their feedback to the *Visioners*. The *Visioners* then create the final version of the *vision* and communicate it to the other members of the organization. The *vision* is then used for various purposes throughout the organization (use cases). This is depicted in Figure 16. Other members of the organization—in addition to the *Visioners*—are involved in the process. In particular, they are involved in providing *input* to the *Visioners* and later they have the opportunity to review the draft *vision* and provide *feedback* to the *Visioners*. The *vision* is tested using this model. Arguably, there is less risk with this model because of the involvement of other members of the organization and the testing.
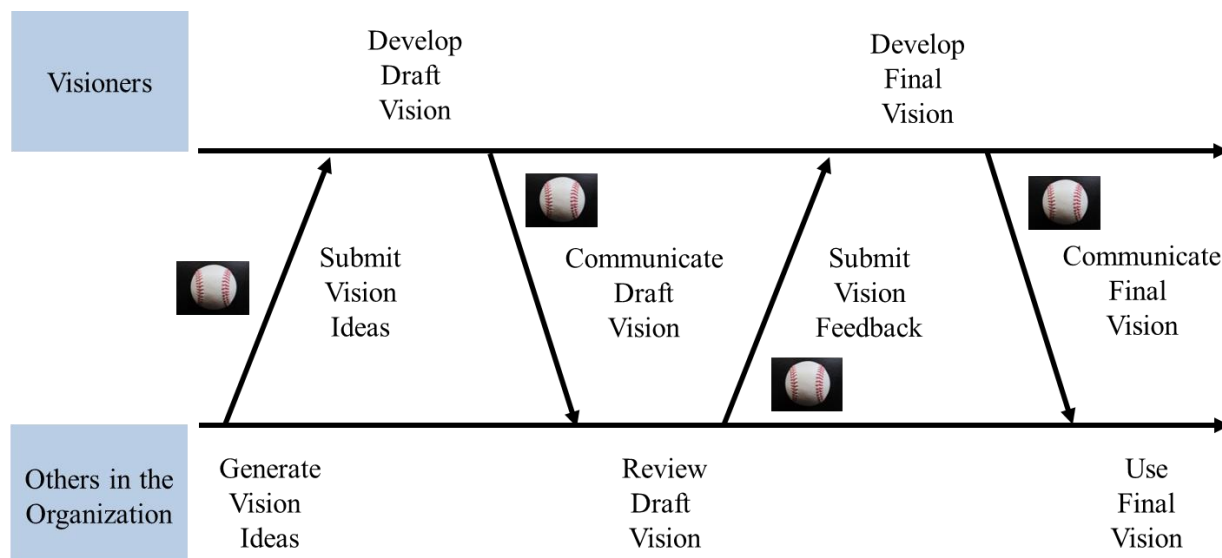

Figure 16. Up-Down Twice Model.

The three models can be evaluated using various criteria. Ten potential evaluation items are shown in Figure 17. The Down Once Model is the most desirable based on Process Speed, Number of Labor Hours, Logistics, Amount of Processing, and Amount of Communication. The Up-Down Twice Model is the most desirable based on Diverse Perspectives, Involvement, Input, Ability to Test, and Risk. These evaluations are based on this author's judgment which is important to keep in mind. The Down Once Model is a *compromise* in that it has involvement, but no testing. Those responsible for designing the *visioning* process will need to make tradeoffs.

Author's Perceptions	Process Speed	Number of Labor Hours	Diverse Perspectives	Involvement	Input	Ability to Test	Logistics Work	Amount of Processing	Amount of Communication	Risk
1 = Best 2 = Second Best 3 = Worst										
Down Once	1	1	3	3	3	3	1	1	1	3
Up-Down Once	2	2	2	2	2	2	2	2	2	2
Up-Down Twice	3	3	1	1	1	1	3	3	3	1

Figure 17. Evaluations of the Three Models.

The Application of the PDSA Cycle for Visioning

The Plan-Do-Study-Act (PDSA) Cycle (Deming, 2018) can be used to create and communicate a *vision*. One advantage of framing the *visioning* process using the PDSA Cycle is that it emphasizes the potential iterative nature of the process. A *vision* is often reviewed and revised every few years and so the use of the PDSA Cycle sets the expectation that the *vision* is not *chiseled in stone* like the mission, philosophy, and values which tend to be enduring. The PDSA Cycle for *visioning* is depicted in Figure 18 and will now be described.

Decide to Vision: This is the same as Step 0 of the *Basic Visioning Process* depicted in Figure 13.

Plan the Visioning Process: This is the same as Step 1 of the *Basic Visioning Process*.

Do the Visioning Process: This is the same as Step 2 and Step 3 of the *Basic Visioning Process.*

Study Adherence to the Process & the Results: This is a follow-up activity after the *Basic Visioning Process*.

Act on the Lessons Learned: This is a follow-up activity after the *Basic Visioning Process*.
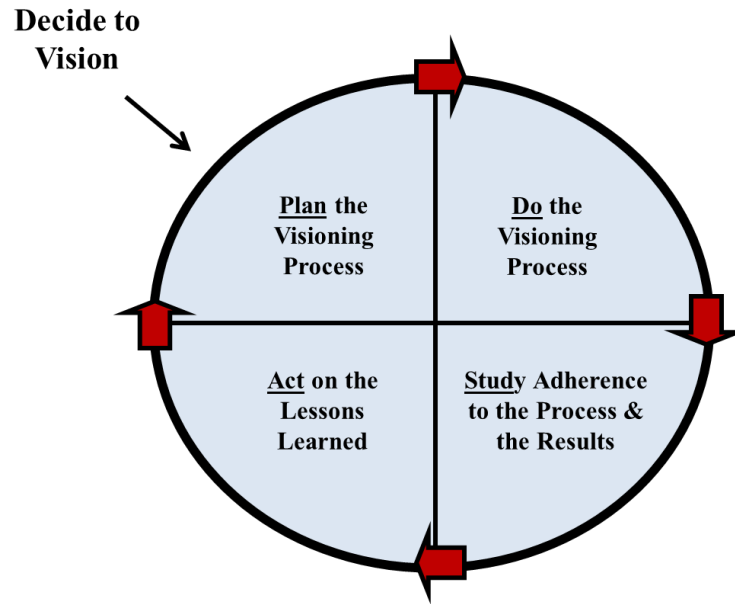
Figure 18. Use of the PDSA Cycle for Visioning.

Visioning Techniques

There are numerous techniques for creating and communicating a *vision* (see, e.g., Ayano, *et al.*, 2011; Daigaku & Kenkyujo, 1992; Liedtke, 1995; Nayatani *et al.*, 1994; Ronis, 2007; and Sibbet, 2013) – two will be described here. The first is the Affinity Diagram Technique and the second is the Image Collage Technique. Both techniques consist of a group of people involved in a social process to generate ideas (i.e., *ideation*) and then process those ideas as foundational content material for creating the *vision*. What is important is for the *Visioners* to (1) imagine potential desired distant futures of the organization and then (2) discuss and evaluate them.

1. **Affinity Diagram Technique:** This technique has many variations (see, e.g., Nayatani *et al.*, 1994), but what follows is the basic process:

In-Person Version (a virtual version requires a video platform and software):
1. Assemble the *Visioners* who may or may not be members of the Leadership Team.
2. Introduce the guiding question - E.g., What do we want our organization to be like in ten years?
3. The *Visioners* silently brainstorm ideas on sticky notes – aim for at least 10 ideas per person.
4. Place the sticky notes on the wall or whiteboard – it is best to position them haphazardly.
5. Have a subgroup of *Visioners* sort the sticky notes into groups based on similarity or likeness.
6. Have the full group discuss each group.
7. Name each group with a header (2-5 words that capture the essence of the ideas in each group).
8. Create the final diagram.
9. Present the findings.

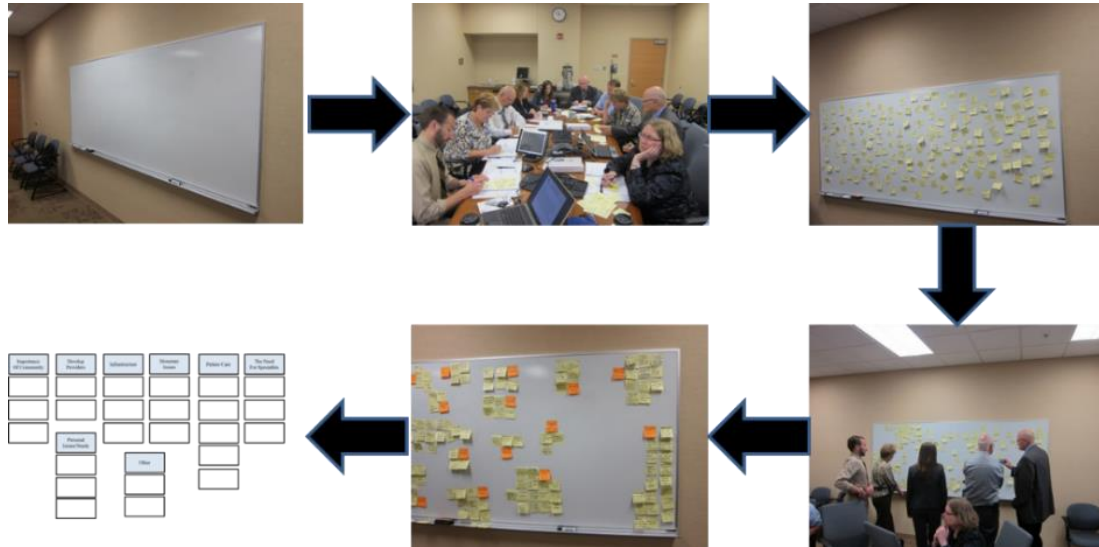This basic process is depicted in Figure 19.

Figure 19. In-Person Affinity Diagram Technique.

You end up with a number of *key words* which can also be generated using open brainstorming. An example of headers (2-5 words that capture the essence of a group) is depicted in Figure 20.

Figure 20. Headers from Affinity Diagram.

The *Visioners* then use the output of the Affinity Diagram Technique to create a draft of the *vision statement*. This process might require more than one meeting and it might be conducted by multiple groups (replication). Whether the draft *vision statement* is shared with others in the organization for their feedback depends upon the model that is used (e.g., Up-Down Twice Model). This technique can be used with any of the three models.

2. Image Collage Technique

The Image Collage Technique consists of the *Visioners* assembling images that depict or symbolize the potential desired distant future state of the organization. The images could be icons or pictures from personal photograph collections, magazines, and/or the internet. Each image is discussed by the *Visioners* and then labeled with an idea, theme, or concept that captures the essence of the image. Some useful resources to have at hand include a diverse set of magazines, scissors, masking tape, Wi-Fi, and printing capabilities. This technique works well if everyone is in the same room and the *Visioners* are working together with the images—although it can also be conducted virtually. The partial result of one application of this technique is depicted in Figure 21.
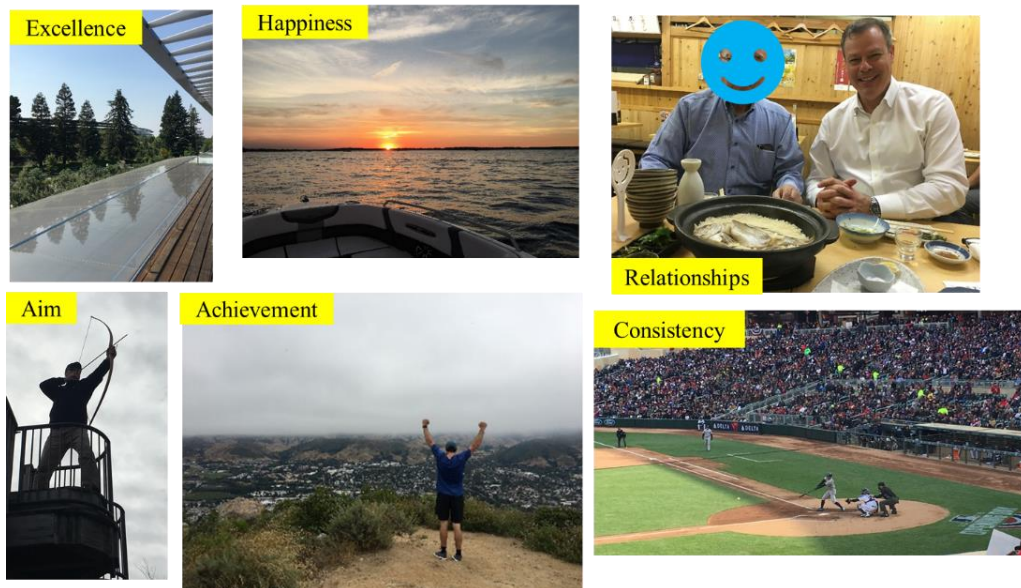

Figure 21. Collage Containing Vision Images.

A potential next step is to analyze the collage image items. This is depicted in Figure 22.

Collage Image Title	Idea/Theme/Concept
Excellence	High Performance Level Aspiration
Happiness	Joy in Work and Profession
Relationships	You Cannot Succeed Alone
Aim	Identify a Target and Focus
Achievement	Set and Accomplish Goals
Consistency	Consistent and Reliable Performance

Figure 22. Collage Image Titles.

Step 3. Communicate the Vision: The third step depicted in the *Basic Visioning Process* involves communicating the final version of the *vision*. Various approaches and techniques for creating an *organizational vision* were previously discussed. We will now focus on communicating the *vision* once it has been created (see, e.g., Quigley, 1993; and Sibbet, 2013). There are numerous communication options available to *Visioners* in terms of messaging; messengers; in-person events; distance technology; and communication channels to name a few. A *Basic Communication Model* is depicted in Figure 23. It depicts a Sender sending a Message (*content*) through a Communication Channel to a Receiver. The Receiver may or may not respond to the message.
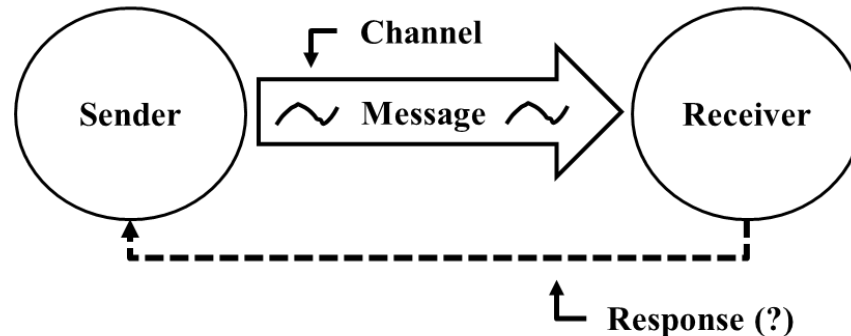

Figure 23. Basic Communication Model.

The ultimate aim is for all of the members of the organization to be aware of the *vision*, understand the *vision*, agree with the *vision*, commit to help the organization attain the *vision*, and use the *vision* to guide day-to-day work. What follows are some suggestions for communicating the *vision*:

- Develop a communication plan.
- Know your audience (i.e., the Receivers).
- Accommodate different learning styles.
- Think deeply about who should be the Senders—they are the messengers.
- Agree on the intended purpose or meaning of each message.
- Take care in crafting the messages because some people will be eager to judge them.
- Use content that is clear, concise, compelling, and consistent.
- Use multiple channels (town halls, huddles, bulletin boards, email, intranet site, etc.).
- Communicate the *vision* multiple times.
- Encourage responses from the Receivers.
- Communicate the *vision* plus other information for context such as related data and stories.
- Communicate any *next steps* or *plans* related to the *vision*.
- Engage the Receivers and check for comprehension and impressions.

Conduct Follow-Up Activities (outside the research scope): These activities involve embedding the *vision* in daily work policies and procedures, developing sub-organizational unit goals that align with the *vision*, reflecting on the *visioning* process, evaluating current states with respect to the *vision*, and reviewing progress towards the *vision*. These activities are vitally important because the effectiveness of the *vision* is in part determined by how the *vision* is used once it has been communicated to the members of the organization. Some organizations conduct follow-up reviews to see how the *vision* is being used and also to learn its effects including unintended consequences.

Experiential Research in the Form of a *Vision Quest*

"*Went up on the mountain . . . To see what I could see*"

- Lyrics from the song *Dreams* written by
Gregg Allman (1969) of The Allman Brothers Band

Experiential research was conducted in the form of a *vision quest* to generate insights into *visioning* and to extend—with caution—those insights to *visioning* in organizations. The *vision quest* has historically been an important ritual practiced by many Native American tribes (Irwin, 1994). This author conducted a *vision quest* that was inspired by accounts of *vision quests* described in the literature (see, e.g., Brown, 1953; Hassrick, 1964; and Powers, 1975 & 1982).

Black Elk received his famous *vision* at the age of nine on top of what is now known as Black Elk Peak in the Black Hills of South Dakota (Neihardt, 1979; and Saum, 2017). Crazy Horse was one of the most famous Lakota *visioners* and *visioning* played an important role in his life (Brown, 1953; Sandoz, 1992; and The Edward Clown Family & Matson, 2016). According to Black Elk (Brown, 1953): "You have all heard of our great chief and priest Crazy Horse, but perhaps you did not know that he received most of his great power through the 'lamenting' which he did many times a year, and even in the winter when it is very cold and very difficult."

The major activities involved in the Oglala Sioux *vision quest* process were described by Black Elk (Brown, 1953). The *mapping* of those activities to the *Basic Visioning Process* (see Figure 13) is depicted in Figure 24. The shaded activities in Figure 24 denote the activities conducted by this author in June of 2021. Several important activities were not carried out. The purpose of the *vision quest* was not to fully-replicate the *vision quest* ritual described by Black Elk. The purpose instead was to gain new insights during an actual *vision quest* and extend those insights—with caution— to *visioning* in organizations.

Vision Quest Activity	Comparison to the Basic Visioning Process
Decide to Conduct a Vision Quest	Decide to Create the Vision
Meet with a Holy Man	Prepare to Create the Vision
Experience a Purification Ritual	Prepare to Create the Vision
Ascend to the Mountaintop	Prepare to Create the Vision
Conduct the Vision Quest	Create the Vision
Descend from the Mountaintop	Create the Vision
Experience a Purification Ritual	Communicate the Vision (to the Holy Man)
Communicate Your Vision	Communicate the Vision (to Others)
Live Life vis-à-vis Your Vision	Conduct Follow-Up Activities

Figure 24. Major Activities Associated With a Vision Quest.

The *vision quest* was conducted on *Mato Paha* (Lakota name)—also known as *Noahvose* (Cheyenne name) and *Bear Butte* (contemporary name)—which is located northeast of the center of the Black Hills of South Dakota. *Mato Paha* now lies within Bear Butte State Park. *Mato Paha* has historically been—and still is—regarded as a sacred spiritual place for many Native American tribes and it is a well-known gathering place and landmark (Alkali Community Club, 1969; and Mails, 1979). *Mato Paha* is pictured in Figure 25.

Figure 25. *Mato Paha* **("Bear Butte").**

The *vision quest* preparation included a review of the literature—paying particular attention to specific details of the *vision quest* ritual including the Rite of Purification, Sacred Pipe, Center and Four Directions Cycle, Characters (e.g., *Visioner*, Holy Man, & Helpers) Roles & Responsibilities, Materials, Songs, and Prayers to name a few (see, e.g., Brown, 1953; Hassrick, 1964; Irwin, 1994; Mails, 1979; and Powers, 1975 & 1982). Mountaintop time was scheduled for June 16-17, 2021. Intensive research on *visioning* was conducted prior to spending the two days *visioning* on the mountaintop. The *visioning* process was documented and post-*visioning* analyses were conducted.

There is a winding trail from the parking lot of the Bear Butte Education Center to a well-constructed wood viewing platform at the top of *Mato Paha*. The platform is raised 2-3 feet off the ground and very sturdy. It is roughly 12 feet by 20 feet. The *ascent* and *descent* of the mountain take roughly one hour if you stop to enjoy the vistas. The **guiding question** on the mountaintop was the following: What insights and knowledge that are acquired during a solitary *vision quest* can be applied to *visioning* in organizations?

Several iterations of a *vision quest* cyclical pattern were conducted. Black Elk described this cyclical pattern in detail as it is *core* to the *vision quest* ritual (Brown, 1953). Each iteration of the *cycle* involved starting at the Center of the platform ("*Center*") and going first to the Western edge of the platform for a few minutes—for gazing and contemplation—and then returning to the Center; then going to the Northern edge of the platform for a few minutes and then returning to the Center; then going to the Eastern edge of the platform for a few minutes and then returning to the Center; and then finally going to the Southern edge of the platform for a few minutes and then

returning to the Center. Cycle times ranged from fifteen to thirty minutes. The Center and Four Directions Cycle is shown in Figure 26. Notes were taken and sketches created during the process.
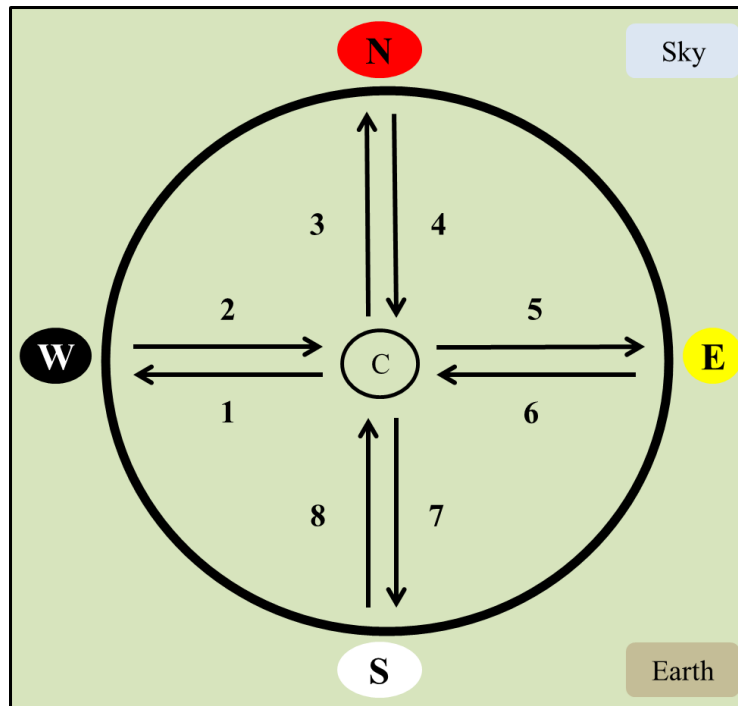

Figure 26. The Center and Four Directions Cycle.

An interesting phenomenon occurred when two birds appeared—identified as turkey vultures. They were *together* and they seemed to follow a cyclical pattern of their own which began with them soaring together in flight just beyond the Easterly ridge of the mountaintop. They would then fly and glide together directly over the platform to the Westerly ridge of the mountaintop. They repeated this cyclical pattern for over an hour. Occasionally, other turkey vultures *joined* them, but they didn't stay with the original two birds for long. The original two birds continued to fly, soar, and glide together. The name of the concept that was eventually applied to the phenomenon was *Dynamic Synchrony* which is not a *new to the world* concept. Two images of the phenomenon are depicted in Figure 27. The image on the right is annotated so the reader can *see* the concept better.

The two birds appeared to have a *mutual agreement* or *pact*—which is arguably a flawed anthropomorphic interpretation: "*Wherever you go, I'll follow, wherever I go, you'll follow.*" The *primary objective* of the two birds appeared to be *stay together* which meant each had to make real-time adjustments to the other as they flew, soared, and glided over the mountaintop. Other turkey vultures—if that is the correct identification—came and went, but they didn't appear to be part of the *agreement* between the original two birds. The agreement seemed to involve *mutual mirroring* and a *commitment* to each other (another anthropomorphic interpretation). Several applications of the *Dynamic Synchrony* concept eventually came to mind: family member relationships; customer and supplier relationships; strategic business partner relationships; Leadership Team-to-department relationships; department-to-department relationships; team leader-to-team member relationships; and interpersonal relationships. All of these relationships can potentially benefit from *Dynamic Synchrony* (*mutual mirroring* and *commitment*).
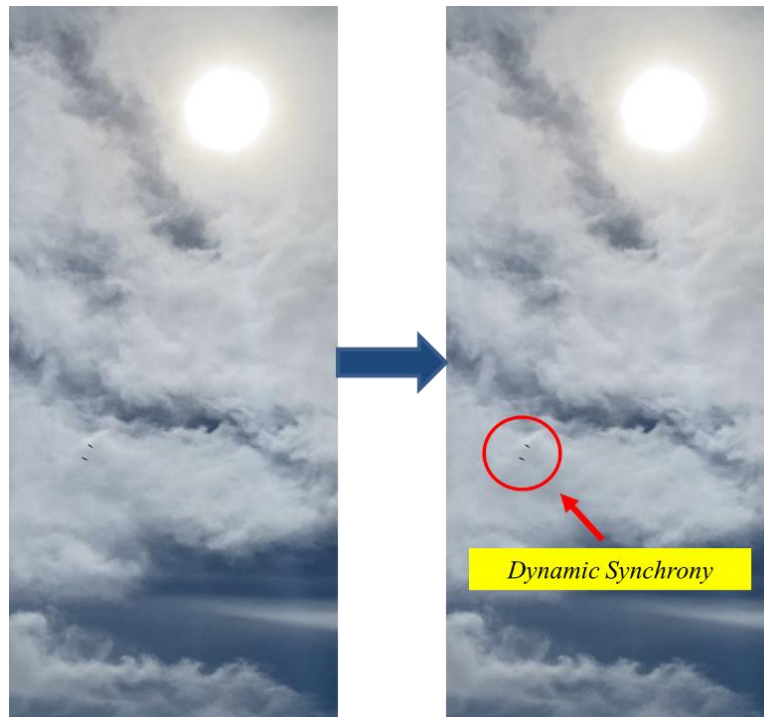
Figure 27. Vision Image (at *left*) and Emergent Vision Concept (annotated at *right*).

Numerous lessons were learned during the two days of the *vision quest*—too many to adequately list or describe here. The seemingly more important and useful lessons will now be described. These "*lessons*" have major limitations and are not to be viewed as *scientific truths*, but rather as general informed recommendations on *visioning* for *Visioners*.

Lessons from the *Mato Paha* Vision Quest and Extensions to Organizations

Learning Curve: Have realistic expectations the first time your organization does *visioning*. It might not go well the first cycle and/or during the first few formal scheduled events.

Ascent & Descent: Be mindful of the experiences of those involved in *visioning* both prior to *visioning* and afterwards. Their thoughts and feelings will likely change during *visioning*.

Process: Consider using a framework and/or cycle to guide your *visioning* activities.

Don't Forget the Center: Don't follow a *visioning* process like a robot. Know what you are doing and why. Know your *Center* and keep it in mind—like your mission, philosophy, and values.

Attentiveness: Pay close attention to what happens during the entire *visioning* process. You don't know what details, discussions, and/or ideas will eventually turn out to be important.

Punctuated Learning: Be patient during the *visioning* process. There might be long periods of time where the *ideas aren't flowing* and *nothing seems to be happening* . . . and then BOOM!

Environment: Be careful when scheduling events and selecting venues. An off-site retreat on a Friday in May might produce different results than an on-site meeting on a Tuesday in December.

Decisioning: *Visioning* is a learning process—be careful not to make snap decisions during *visioning*. Establish clear decision rights so that people know who can make what decisions when.

Tacit Knowledge: *Visioners* will gain *tacit knowledge* (Nonaka & Takeuchi, 1995; and Polanyi, 1966) which is difficult to share. Get better at converting tacit knowledge to explicit knowledge.

Processing: Build-in time for reflection, introspection, and refinement at the end of—and long after—the *visioning* process. Be careful not to take premature actions or make premature decisions.

Communication: Think deeply about what you will communicate, when, how, and to whom both during the *visioning* process and after it has been completed.

Emergent Ideas: The insights, ideas, concepts, and themes that are conceived during the *visioning* process are gifts – document, develop, and share them with the other members of the organization.

V. Emergent Visioning System

Creating and communicating a *vision* can be approached from a *systems perspective*. According to Deming (2018): "A system is a network of interdependent components that work together to try to accomplish the aim of the system. A system must have an aim. Without an aim, there is no system." Many have stressed the importance of understanding *systems thinking* (see, e.g., Ackoff, 1981; Deming, 2018; and Senge, 1990). An *Emergent Visioning System* was created based on the literature review, case study analyses, and *vision quest*. It is depicted in Figure 28.
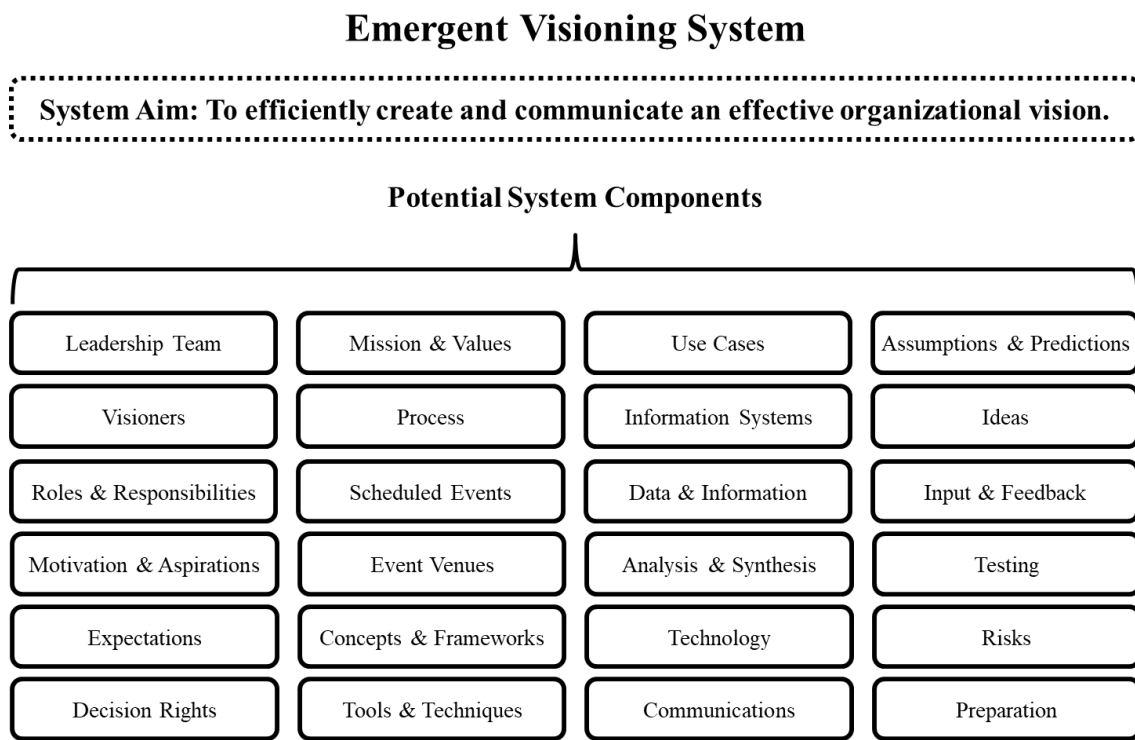

Emergent Visioning System

System Aim: To efficiently create and communicate an effective organizational vision.

Potential System Components

Leadership Team	Mission & Values	Use Cases	Assumptions & Predictions
Visioners	Process	Information Systems	Ideas
Roles & Responsibilities	Scheduled Events	Data & Information	Input & Feedback
Motivation & Aspirations	Event Venues	Analysis & Synthesis	Testing
Expectations	Concepts & Frameworks	Technology	Risks
Decision Rights	Tools & Techniques	Communications	Preparation

Figure 28. Emergent Visioning System.

The conceptual framework depicted in Figure 28 contains the following: (1) the aim of the *Emergent Visioning System* and (2) potential components of the *Emergent Visioning System*. The Aim is *to efficiently create and communicate an effective organizational vision*. The word "*efficiently*" refers to the usage of resources and the word "*effective*" refers to the *value* the *vision* contributes to the members of the organization. The components of the *Emergent Visioning System* must interact in very special ways in order to accomplish the aim of the system. For example, the Leadership Team must interact effectively with the *Visioners* if they are different people; the *Visioners* must interact effectively with Technology; the Process must interact effectively with Information Systems; the Testing must interact effectively with Risks; the Scheduled Events must interact effectively with Communications; etc.

Awareness and knowledge of the components of the *Emergent Visioning System* and the important interactions between those components can help the *Visioners* be successful—especially in choreographing the scheduled events and communications. There are a number important questions to consider when designing an organization's *Visioning System.* Some of the questions are shown below:

Sample Visioning System Design Questions:
- Who will own the *Visioning System*?
- Who is accountable for the eventual *vision*?
- Who has the decision rights?
- Who should be the *Visioners*?
- How will the *vision* be used?
- Who else should be involved in the *visioning* process?
- What should be the steps of the *visioning* process?
- What model should be used?
- What type of *vision* should be created?
- What is the deadline?
- What should be the scheduled events?
- How can expectations be managed?
- How should people prepare for *visioning*?
- What are the current assumptions and predictions about the future?
- What analyses and syntheses should be conducted?
- What tools and techniques should be used?
- Who will we communicate the *vision*?
- How will new ideas be generated?

Visioners can assure that the components of the *Emergent Visioning System* are considered during system design and that the components interact effectively during the *visioning* process. The components will need to interact in very special ways in order to accomplish the system aim.

V. Conclusions

A *vision* was defined as *the conception of the desired distant future state of the organization*. It suggests a desire for the organization to be *different*—and preferably *better*—than it is now. We know that a *vision* is neither necessary nor sufficient for organizational success—but many organizations have found it useful to have a *vision*. *Visioning* was defined as *the carrying out of intentional organizational activities to create and communicate an organizational vision*.

This research report provides tentative answers to two questions: (1) What are some of the major types of *vision statements* used by organizations today? and (2) What are some of the major *visioning* approaches used by organizations today? The research activities that were used to answers those questions involved a case study analysis of three *visions* (JFK, FPL, & Komatsu); another case study analysis of one hundred *vision statements*; a description of several *visioning* models and two *visioning* techniques; a discussion of the findings of experiential research in the form of a *vision quest*; and the introduction of an *Emergent Visioning System*. The answers to the two questions in this research report are not complete, comprehensive, or definitive. However, they *advance the science* on *visions* and *visioning*. The findings of this research report should be useful for those *Visioners* who are tasked with creating and communicating a *vision*.

It was found that there are many different types of *vision statements* used by organizations today—eight of which were presented and discussed. The most common type being in the form of *ends* and *means*. It was also found that there are many different *visioning* approaches such as the *Basic Visioning Process*, *Up-Down Twice Model*, and *PDSA Cycle*. *Visioners* have many choices when creating a *vision* such as type of *vision*, which events to schedule, which venues to select, which model to use, which techniques to apply, and which words to use in a *vision statement*. The *Emergent Visioning System* can be used to help *Visioners* make those important decisions.

A *vision* is one important mechanism that leaders can use to improve organizational performance from a strategic perspective. A *vision* can inspire the members of the organization to make the organization *better than it is now*. Hopefully leaders will devote the necessary time and energy to create and communicate an effective *vision*. Perhaps this paper will help contribute to their success. Best wishes as you create and communicate your *vision*!

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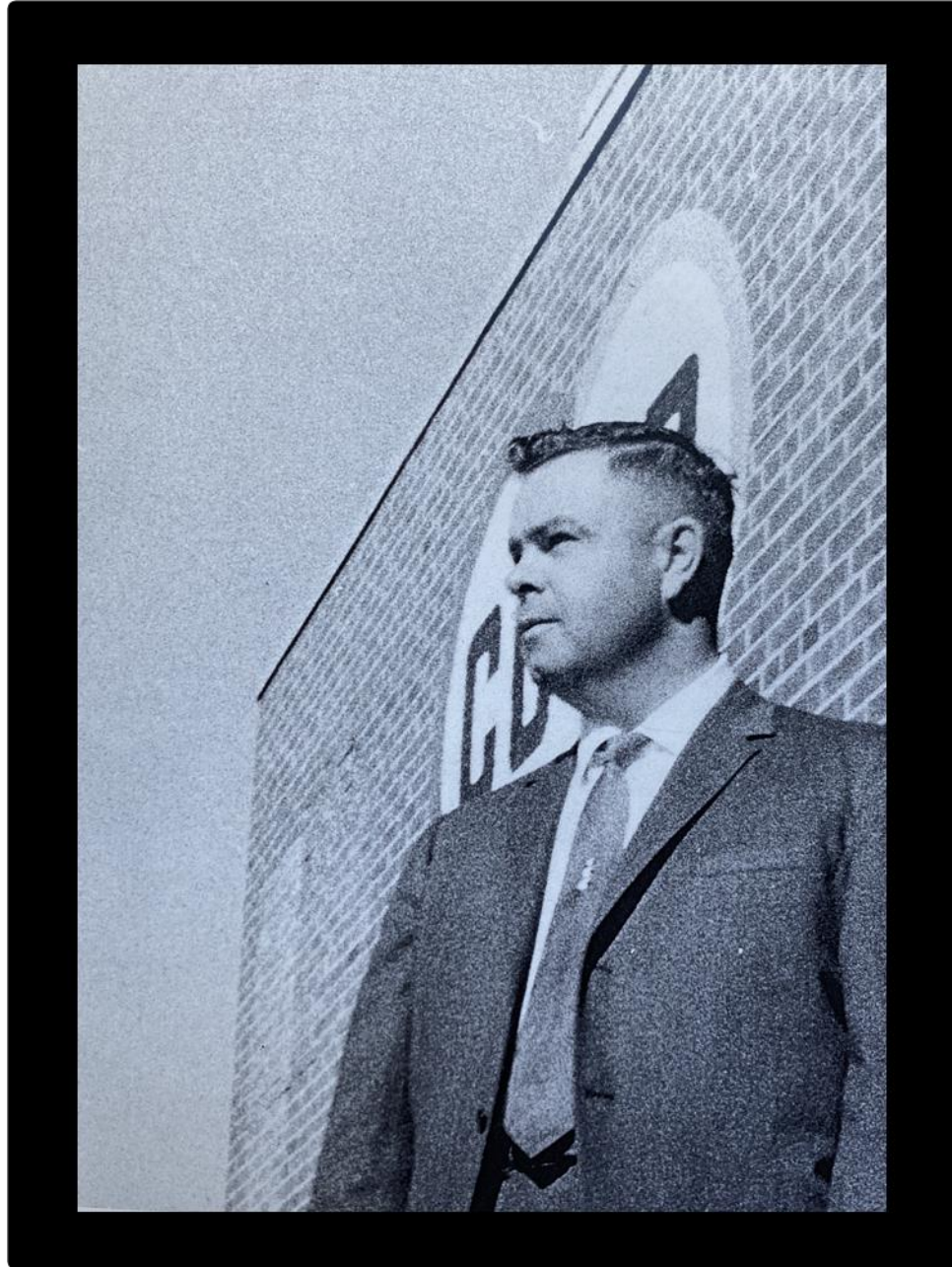
Alvin Ernest Liedtke

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