A Step-by-Step Guide for Developing Vision with a Team

Welcome back to this session. In this session, we're going to be looking at a **step-by-step process for developing vision with your team**. This is going to be a great practical session for people who have never walked through vision with your team or you're looking for a new process for walking through vision with your team. It takes the tool that we have and the book that we have written about vision, and it gives you a guide to walk through vision as you work through it with your team. This is something we've used over and over again, both with our own teams, and then with scores of companies and leaders and teams all over the country to be super successful. So, I think you'll find it to be super helpful to you.

So, a couple of resources that you are going to want to have handy as we walk through this:

1. **SIMPLE Vision Tool,** which there is a link to in this lesson. You can print that out.
2. You'll want access to a copy of our book (**Creating Your Business Vision**). You either have a hard copy, which you can get from us, or you can order on amazon, or we have it on kindle version. You can also download a copy, I believe there's a download link in this lesson as well for that, so you can follow along with that as we go through this session.

As you know, when you think through vision individually, when you think through vision with your team, when you collaboratively think through vision with people within your organization, you end up with a clear, powerful, yet, simple vision that will bring dramatic improvements to your life, to your work, to your organization. As you use our tools, you end up with a clear, powerful, simple vision that brings dramatic improvement to your life, work and your organization.

So, let's look at this for a few minutes.

Vision is energizing. Vision brings energy to everything that we do. It brings energy to our thinking, it brings energy to our tasks and behaviors, it brings energy to our work, it brings energy to our team. It's enlivening, it's the **guiding motivation for all great**

human endeavors. So, growth requires clear, compelling vision. Vision is what our organization will become; and if we can see it, then we can build it. If we can see where we're headed, then we have a whole lot better chance of getting there. When it's complete, vision becomes this giant magnet that pulls us forward regardless of the day to day changes, or regardless of the day to day crises that occur.

We talk more about that in other sessions, but here's our purpose for this session: we want to help walk you through a process to **develop vision with your team**. So, we are going to give you 9 steps, a step-by-step process, a checklist if you will, to help you follow along **to develop vision with your team.**

Number one: Do it together. You say, "Hey! I was already thinking about — I'm watching this session because I'm thinking about developing vision with my team. Why are you telling me to do it together?" Here's why this is important, because many leaders, who want to develop vision, they sit down by themselves and they start writing things out. They get their passion put down, and their vision, and their ideas put down, and then they just hand it off to somebody and say, "Hey. Do you think this looks good?" They come back and they say, "Hey. I think this looks good, go do it." Then they end up not getting buy-in, they end up not getting people on board, and they end up not making progress with it.

So, when we say do it together, we mean literally. Don't even put the pen to paper. Don't type anything out, or if you do, withhold it until you walk through the process with the team and let your ideas inform and guide the discussion together with the team. Be determined that you're not going to move forward without them. Either proceed together or wait together — do it together.

If you are an entrepreneur, we're talking about something very different. You may have people who give you feedback, or you may have a mastermind group that you meet with regularly. They would be great people to involve in the process, and so you could just modify this process slightly to work with them. But, most of us have a team of some type that we're working together with to engage in the process.

Number two: Prepare in advance. Again, we feel like this goes without saying, but the important thing here is that not just you let them know, "Hey. We're going to do this

process," but that we distribute the tools and the process that we're going to use to allow them to be thinking about it before they get in the room or before they go away to a retreat, if you're going to use that format, that they have seen these things. The first time they're seeing them is not when you sit down to do the exercise. You can even ask them to complete specific steps prior to that initial meeting or prior to the vision retreat. So number one, do it together. Number two, prepare in advance.

Number three: Once you get in the meeting, **review the current background documents** for the company, the organization, the team, whatever it is that you're working on. Do you already have written out a vision, are you revisiting it, are you rewriting it, are you tweaking it? Do you already have a mission or a purpose written out? Do you have core values or core convictions? Review those things. This is particularly helpful if you either have a younger inexperienced team, or if you've brought several new team members to the team in the recent past who may have not seen these items. So, review the current documents. It's also important and imperative for teams and organizations that have been together for a long time, because we forget what we've been working toward, and if it's something that we haven't interacted with on a regular basis, there are probably things that we had aspired to do that we're not doing, so, it's good for us to review the background documents whatever we have currently for the organization or for the team.

Number four: Ask them, "Does it make sense for us to revisit the vision?" Or if this is the first time you're doing it, ask them, "Does it make sense for us to work on vision or to look ahead?" Now I will tell you, if you're working with a team that is interested in growth or a team that is interested in moving forward, 99.9% of the time they're like, "Absolutely! I want to know where we're headed so I know what to work toward."

When we worked through this process, years ago, in a university in South Carolina, it was one of the first times that we had walked through this process. I asked our team this question, "Hey, do you think this makes sense for us?" Every single one of them on the team said that, "Vision or knowing where we were headed together would add significant value to our work." Now, most of them said, "I don't know what that looks like, or I don't know what the steps would be to work through that process," but they believed that it would be critical if we were going to grow. At that time, the university needed to have significant growth just to continue employing the people that were there and continue serving the students.

Several people observed that while there was a current vision that was bold and effective, it wasn't specific enough. We needed to revise and update it. These are the types of feedback. If you'll just ask the questions, they'll champion this cause for you. In fact, it's often even good if you're not the one leading the conversation; if you would have somebody from the outside come in, or maybe somebody from another part of the company that comes in and facilitates the conversation. So, that's a quick tip.

Number five: **set up a vision development meeting**. Once you get their buy-in, set up a vision development meeting. Now, again, the things we've discussed up to this point could be done before you ever plan a half day retreat or before you ever plan an off-site to go through the vision development process.

So, number five is, once they say, "Yes, we need to do this," then you say, "Okay. We're going to plan an off-site or we're going to plan a retreat." You'll need a minimum of a half day. In fact, I would plan probably a day and a half to two days to walk through this process if you really want to do a good job. A full day is definitely better than a half day; a day and a half to two days will be even better. That gives you time to work through the process then to have some down time to talk about it, think about it and come back to it. So, set up a vision development meeting, whatever that looks like; a retreat, or an off-site, that type of thing.

Number six: We recommend that you **get away**. Get away from the office, get away from your home, get away from the distractions. If you're going to get away with a team, then you get away at least an hour, hour and a half, two hours away, so they can't drive back that night or if something happens and there's an "emergency" they're not leaving and running back home or something that may not be as significant.

We encourage that the process be done in an environment that allows for the highest probability of creativity and thought. We recommend that you schedule a full day away from the office with a team. Go on a retreat, visit a park, go to the mountains, go to the beach; find some place where the team won't be interrupted, or where you won't be interrupted, or distracted by your phone, email or people. The first time I did this — my dad has a rural property in Central Virginia. I went there, in fact, it was the first time I wrote out the vision before we had all the team members that we have now, and so it was just me. I was the only one. I got away, I put the tool with me that we had developed, and I started working through the process.

My dad happened to be there that weekend which at first I thought, "Man, this is not going to go well because my dad's going to want me to hang out with him, my dad's going to want me to talk with him." So, I prepared him ahead of time. I said, "Look, this is what I am trying to do. This is what I want to do when I come. I really need to focus on this." What ended up happening is, I got there, I worked for several hours, and then he would prepare me lunch, or he'd prepare me breakfast, or check on me to see if there's anything I needed, but for the most part he left me alone. So, it was cool for me to be able to get away in a space that really allowed me think space, and was free of distractions, to be able to think through this creatively and do good work on it. So, number six is get away.

Number seven: Once you're there, once you're set up - then you **work through the SIMPLE Vision Tool**. If you're by yourself, you work through it individually. If you're working through this with a team, then the team works through the SIMPLE Vision Tool. We've got a number of resources that are available for you as you work through the SIMPLE Vision Tool including the book and the tool itself.

Number eight: following the meeting or following the retreat, then your team, whoever is leading or facilitating will **finalize** the vision document and a **draft** of the vision document, and **distribute** it to the team. Then you could go through wordsmithing, and editing, and finalizing it.

Number nine: Most importantly, **share** the vision every chance you get. We talked about this in another session. Communicate the vision, every chance you get. If you feel like you're saying the vision too much or communicating the vision too much, you're not. You can never talk about the vision enough. I would figure out ways to conceptualize it in a short sentence that you can repeat over and over again so much that your people get to the place where they're repeating it over and over again, almost ad nauseam. So, get to the place where you're sharing that vision every chance that you get.

I can tell you from experience, not only with our own work, with our own team, but in working with hundreds of leaders and organizations all over the country, all over the world, that your work, your team, your influence, your leadership, your energy will never be the same after you work through this process with your team because of this one purposeful decision.

Action Step:

Now, here's what I want us to think about, as we wrap this up: **Is it time for you to get your team together and revisit vision?** Second thing, if it is, then **schedule time right now**. Even if you're scheduling it for next quarter or you're scheduling it for later in the year, schedule time right now. **Get it on the calendar and then work through this simple process that we just went through.** Sound good? All right. We'll see you on the next session.