

Vision Setting Best Practices

Well-defined mission, vision, and values:

- Clearly communicate the purpose of the organization to all stakeholders.
- Inform strategic development.
- Provide collective guidelines for making decisions, treating internal and external customers, and holding all members accountable.

Mission: The mission statement communicates the organization's reason for being, and how it aims to serve its key stakeholders

- What differentiates this organization from everyone else?
- What is the fundamental purpose or reason for our company's existence?
- What do we do to provide the most value?

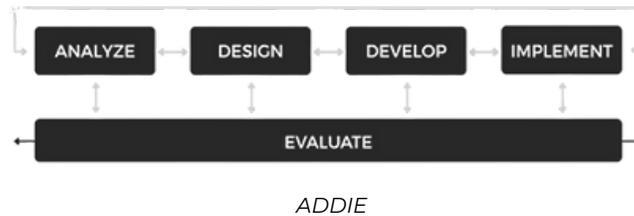
Vision: The vision statement is a future-oriented declaration of what the organization aspires to become.

- What do we aspire to achieve as an organization in the long term, beyond just financial success?
- How do we envision our organization making a positive impact or contribution to society, our community, or our industry?
- What impact do we hope our company will have on the lives of our customers, employees, and society as a whole?

Values: The values are the intrinsic beliefs and the collective guidelines for how the organization will accomplish its mission and vision.

- What are our intrinsic beliefs that guide the soul of the company?
- What are our non-negotiable principles by which people conduct themselves, make decisions, navigate challenges, and treat each other and our customers?

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Analysis

- Review existing mission, vision, values documents, if they exist.
- Collect input from multiple stakeholder groups (including customers) through interviews, written surveys, focus groups using the questions above under mission, vision, and values.

Design

- Identify themes from analysis and draft sample mission, vision, and values statements.
- Identify the core stakeholder group to create a working draft.

Develop

- Invite the core stakeholder group to a vision-setting workshop, ideally offsite.
- Distribute the drafts to the core stakeholder groups to review and edit prior to the session.
- Facilitate the group in finalizing a working draft of the mission, vision, and values.
- Allow core stakeholder group several weeks to reflect on the draft statement and socialize with team members, colleagues, customers, etc.
- Reconvene the core stakeholder group to finalize the mission, vision, and values.

Implement

- Announce the mission, vision, and values to all stakeholders and make them visible.
- Incorporate the mission, vision, and values into the organization's existing routines and processes. For example, meeting agendas, rewards and recognition efforts, performance management, interviewing processes, etc.

Evaluate

- Identifying mission, vision, and values takes time, reflection, and input from all stakeholders.
- Evaluate at each stage to ensure all voices are represented, the direction resonates with the heart and future of the organization, and that the final mission, vision, and values progress into the way each member of the organization operates.