Creating a Vision

How can I build a vision for my team?

Make sure that your team vision in some way reflects the essential contribution that you intend to make to the wider vision of the organisation. “Investing in knowledge and opportunity” What do you have to do to play a part in this? You may play an important role in one of the seven key areas identified in the strategic plan 2015-2020. [https://strategy.leeds.ac.uk/downloads/strategic_plan2015.pdf](https://strategy.leeds.ac.uk/downloads/strategic_plan2015.pdf). Having a clear vision can give your team a sense of direction, inspiration and hope in an uncertain and changeable future. It also provides a focus and foundation for team and individual goal setting and action planning.

1. Get people involved in creating your vision

   It all starts with getting the right people together. In many cases, this may just be your own staff. In other cases, it could be dotted-line team members, members from other teams who you work with, and other key stakeholders e.g. students, who might have good ideas to contribute and have a part to play in implementation of the vision.

2. Preparation

   Schedule at least a 1/2 day, or a full day for larger, more complex scenarios. An off-site location, if possible, is best. You want to minimize interruptions, and get people away from their day-to-day environment in order to stimulate creativity. For dispersed teams, a face to face meeting is a must.

   Consider the use of a neutral “facilitator”. That is, someone trained in group dynamics that has no biases or stake in the team. That way, as a leader, you are able to focus on being a participant, and not have to worry about the mechanics of the meeting. Removing yourself as the focal point also helps open up the free flow of open dialog from others.

   Rule of thumb: for every hour of meeting time, double the amount of preparation needed.
3. Determine appropriate "input" to the vision.

Schedule the meeting far enough ahead of time to allow for preparation. Send out documents to review ahead of time, i.e., current vision, market research, competitor analysis, PMF and NSS survey results, previous IPE submission or any other information needed to prepare the participants. Establish the expectation that preparation is essential in order to actively participate. Preparation helps plant some seeds, and create a little pre-meeting energy and buzz.

Consider adding internal or external guest speakers to the early part of your agenda. For example, bringing in senior leaders to discuss Faculty/Service strategy and the implications for your team.

4. Set the stage.

At the start of the meeting, review the desired outcomes, agenda, process and ground rules. Take extra time here to check for understanding and agreement. Doing this sets the stage for how the rest of the day will flow - you are modelling collaboration and collegiality. Taking time here to get the foundations right will allow you to pick up speed and momentum for the rest of the day.

5. Create and use a process that ensures full participation, openness, creativity and efficiency.

A trained facilitator can help you with this, or you can design it yourself. The key is to have a plan and process - you can't just go in and "wing it" like you may do in a regular meeting when you are familiar with the topic and need little preparation. Here's a process that can be followed:

- Explain to the team what a vision statement is and why they are important. You might show a few examples.

- Ask the group to imagine what this team, organization, or project could look like 3-5 years from now. What would success look like? What could you achieve? What would they want to achieve? If they were to pick up a copy of Reporter in 3-5 years from now, what would the headline say about what this group has accomplished?

- Either individually, in pairs, or in groups of 3-4, help people create those headlines on flip charts. Tell them to include pictures, phrases, or anything else to describe that desired future. Give them about 20
minutes.

- Ask each person or team report out to the larger group. If you are the leader, go last, so you don't bias the rest of the group. This also gives you the opportunity to incorporate other's ideas into the team’s vision.

- The facilitator or leader should be listening for and recording on a flip chart key phrases that describe each vision. This is the time to listen and to ask clarifying questions, but not to evaluate as you go. Let peoples creativity flow!

- Add up the number of phrases \( n \), divide by 3, and give everyone that many stickers to "vote" with \( n/3 \). Explain it's not really a decision making vote, it's simply a way to quickly take the temperature of the group and see how much agreement there is.

- Start with phrases that received a lot of vote, discuss, and check for agreement. Do the same thing for phases that received few votes, and ask if those items can be crossed off. Work your way to the middle items, using the same process - circle it or cross it off.

- If there are any issues where consensus can't be reached after everyone has had a chance to state their case, then the leader needs to make the final decision.

- You end the meeting with a list of phases that will form key ideas concerning the vision statement.

6. Do the "fine tuning" off line

Group time should not be wasted creating the vision statement and wordsmithing it to death. The leader can do this off-line, and/or ask for 1or 2 volunteers to do it. It can be done during lunch to present back to the team in the afternoon. Use people in your team who are good at distilling ideas into key phrases or statements.

7. Talk to the outliers

If there was anyone who disagreed with the output, or who's favourite idea was not incorporated, talk to them privately to see how they are committed to the
way the vision is progressing. Explore ways to make connections to the vision and their interests and needs.

8. Re-convene the group and review the draft vision statement.

This is a shorter meeting, and can be done over an agenda item in a normal team meeting. Go for "roughly right", or "directionally sound", vs. falling into the trap of drawn-out debates over using the word "grow" or "increase".

9. Review the draft with key extended stakeholders that were not at the meeting.

This is the time to review the vision with your manager, peers, students, suppliers, and anyone one that has a stake in your team's work. It's a chance to get input and help refine it. It also helps and to begin to build a broader coalition of support.

10. Communicate the vision and begin to make it a reality.

A vision is a statement of intent for your future. The words used should be meaningful to the team and inspire and engage them without actually stating any solid goals and action plans. That's the team's next step and requires at least another meeting. Get some of your most creative people involved to bring it alive in a way that inspires, using images, metaphors, and stories.

Investing the time to create a shared vision may be the best investment you've ever made as the leader of your team.

Did you create a “good” vision? Consider if it meets the following criteria:

- It empowers people and focuses their efforts
- It focuses energy for greater effectiveness
- It raises the standard of excellence
- It establishes meaning for today and tomorrow
- It gives hope and aspiration for the future of the team
- It brings unity to the community
- It provides a sense of continuity and change at the same time
- It raises levels of commitment and engagement
- It brings about positive change