Vision Revisited

Telling the Story of the Future

Ira M. Levin
Ernst & Young LLP

Organization vision has been a topic much discussed and written about over the past couple of decades. Yet, confusion still exists regarding what it is and how it is most effectively conveyed. Vision is often confused with the similar constructs of organization mission, philosophy and values, strategy, and goals. This article examines the key differences among these frequently confused constructs and the inherent weaknesses of traditional vision statements to provide the sense of meaning and motivation for organization members. A different concept of organization vision is presented—vision as a descriptive story of the desired future in action. Several examples of such vision stories are presented. A case example is used to illustrate how to develop the vision story and deploy it throughout an organization to gain shared commitment to it.

Some men see things as they are and say “why?” I dream things that never were and say “why not?”

—George Bernard Shaw

I know what you are thinking. No, not another article on vision. What more can possibly be said about it? Vision indeed has been a very popular topic in the leadership, business strategy, and organization change literature over the past couple decades. It has alternated between being construed as a faddish and trendy concept and being viewed as a fundamental attribute of effective leadership and the basis of one’s power.
to lead (Kouzes & Posner, 1987; Quigley, 1994). It has been trivialized by one of our recent presidents, who cynically talked about the “vision thing” as if it were something that the American people expected from him but which he apparently did not expect from himself. And it has been lauded as a critical tool for transforming and renewing organizations and communities.

Nanus (1992) suggested not only that vision was an idea or image of a desirable future but that the right vision actually could jump-start that future by mobilizing people into action toward achieving it. In large part, this motivational value of a clearly articulated vision comes from the sense of broader purpose and meaning that it provides. Frankel (1959), the noted psychiatrist and founder of the school of psychotherapy termed logotherapy, was one of the first to propose that the search for meaning and the need to attach some broader significance to one’s life was a basic human drive. This search for meaning has perhaps taken on even more importance in today’s rapidly changing world of organization life characterized by downsizings, rightsizings, mergers, reengineering, telecommuting, and virtual teams. Davis and Meyer (1998), in their recent book, have observed how traditional boundaries in business and organizations are melting down. Boundaries are becoming increasingly blurred between seller and buyer, among competitors, across industries, between jobs and assignments, and between home life and work life. This can become quite disorienting and confusing for organizational members. Vision possesses potent orienting capacities. It can play a key role in providing a connection to a sense of purpose and meaning greater than oneself and can serve as a beacon of inspiration during times of change and disruption.

Recent research has begun to affirm the value of vision. Kirkpatrick and Locke (1996) discovered that vision had a positive impact on employee performance and attitudes. Baum, Locke, and Kirkpatrick (1998) discovered that having a vision positively affected organization-level performance as measured by growth in sales, profits, employment, and net worth. In addition to the growing consensus among executives, management consultants, and organization scholars as to the value of vision, there also is considerable agreement about the key attributes of an effective vision. It should be future oriented, compelling, bold, aspiring, and inspiring, yet believable and achievable. Effective visions describe a future that is more attractive than the present.

Yet, even with this broad agreement about the value of a clearly articulated vision and the key attributes that vision should possess, there still remain considerable misconceptions about what actually constitutes a vision. Vision is used in a variety of ways and means so many different things to different people. First, it is still frequently confused with similar concepts such as mission, philosophy, goals, and strategy. Collins and Porras (1997) and Quigley (1994) have construed vision as the aggregate of an organization’s statement of mission, values, goals, and strategy. Whereas all of these provide organization members with a sense of purpose, direction, and meaning, there are some important distinctions among these constructs. Second, visions continue to be documented and communicated predominantly in the traditional form of brief, highly elevated vision statements. Top business executives asked to describe their visions for their organizations responded with single-sentence vision statements (Larwood, Falbe, Kriger, & Miesing 1995). In general, these vision statements are so peppered with en vogue phrases, buzzwords, and managementese that not only do they
resemble bumper sticker slogans, but they can be readily interchanged across companies with minimal editing. This is quite paradoxical given the painstaking care with which such vision statements are crafted. Is it no wonder that organization members often view such cliches with skepticism and ridicule, or at best indifference. The glaring weakness of such vanilla vision statements is that they leave so much open to varied interpretations, and they are so lofty that they do not provide a strong personal connection for the very people intended to be inspired by them. Visions are intended to rally the energies, galvanize the aspirations and commitment of organization members, and mobilize them into concerted action toward achieving the desired future. Traditional vision statements fail miserably in this regard.

This article will first clarify the fuzziness surrounding the concepts of vision, mission, philosophy, goals, and strategy statements. Then a different concept of vision will be presented: vision as a highly lucid story of an organization’s preferred future in action. A future that describes what life will be like for employees, customers, and other key stakeholders. Not as a series of general statements about purposes, aspirations, or principles. Not as a statement of what the organization stands for or believes in. Not as a strategic road map for how future success will be achieved. But simply a vividly detailed description of a future that people can readily picture and imagine. This notion of the vision story is derived in part from the earlier work of Lippitt (1983), who experimented with active scenario building as a method of creating a preferred future. Several vision story examples will be offered to help explain this concept. A case study will be discussed to illustrate an approach for developing the vision story and deploying it throughout the organization to build shared commitment to it.

**CLARIFYING VISION FROM RELATED CONCEPTS**

The concepts of vision, mission, philosophy, goals, and strategy have been mistakenly used interchangeably for years. Even with all that has been written about each concept, executives, organization consultants, and scholars still confuse them. The published vision statements of many organizations are more akin to statements of mission, values, or strategy, rather than of vision. While all of these are important for an organization to define and convey to its membership and stakeholders, there are some important distinctions among them.

**Vision and Mission**

Mission describes who the organization is and what it does. It is a statement of purpose, not direction. Effective mission statements commonly define what business the organization is in, its beliefs about how business should be conducted, the markets and customers it serves, and the unique value it contributes to society at large. Rarely do mission statements change significantly over time. Sometimes they may be expanded or modified to reflect shifts in business focus. This occurred, for example, when Hilton reoriented its business focus from the hotel and lodging business to the entertainment business, or when Greyhound expanded from the bus business to the transportation
business. Such shifts may even occur in entire industries. Consider the many health care organizations that today are shifting their business emphasis from a focus on services directed at illness and disease management to those directed at wellness and prevention, and the many banks that are redefining themselves as more comprehensive financial services centers. Mission statements can be idealistic and aspirational rather than simply matter of fact. Perhaps that is what contributes to the confusion with vision.

The vision statement of a multi-billion-dollar global communications company serves as a good example of this confusion. It begins,

We will be the world’s premier provider of full-service communications for people at work, at home or on the move. Our goal is to improve the quality of life for individuals and increase the competitive effectiveness of the businesses we serve. As we move and manage information for our customers, we will set the standards for value and quality.

Although certainly both ambitious and inspirational, this vision statement is more a statement of mission than vision. It describes the business domain chosen to operate in and the value proposition provided to customers. But it does not describe in any detail the future world the company strives to create. It fails to outline what the future will be like when quality of life is improved, competitive effectiveness is increased, and standards are set for value and quality. Nor does it answer the question about how the lives of employees, customers, investors, and the community will be different as a result.

Vision and Philosophy

An organization’s philosophy conveys the principles and values it holds about how business should be conducted. Typically, this ideology is rooted deeply in the assumptions and beliefs of organization founders and early leaders (Schein, 1983). The vision statement of a global apparel manufacturer is really more a statement of its guiding principles and values than a vision. It reads, “We want our people to feel respected, treated fairly, listened to and involved. Above all, we want satisfaction from accomplishments and friendships, balanced personal and professional lives, and to have fun in our endeavors.” It goes on to describe in some detail the leadership style it prefers. This includes “leadership that exemplifies directness, openness to influence, commitment to the success of others, willingness to acknowledge our own contributions to problems, personal accountability, teamwork, and trust.” This vision statement, although certainly an explicit and thorough statement of the company’s core values and beliefs for how leaders and employees should act, does not depict the future. Organizational values and guiding principles are important foundations of a vision, but they are not the vision. Visions certainly need to reflect and be congruent with an organization’s values and ideals, but they should go well beyond such statements of philosophy by describing those values and ideals in action. What is missing in this example is a description of how these ideals are practiced, what that experience is like for those affected, and the link between these preferred behaviors and successful performance. Statements of philosophy and many company credos share aspirational and
idealistic qualities with vision statements. That is why the two are often mistakenly confounded.

**Vision, Goals, and Strategy**

Goals and strategy statements identify specific outcomes sought and the chosen approach for achieving them. Additionally, they should convey a commitment toward achieving or sustaining something that might not exist presently. This aspiration, hope, and commitment for future gain again is what most likely confuses goals and strategy statements with vision. Many company vision statements are really more goal and strategy statements than visions. The published vision of a large national HMO exemplifies this confusion. It states, “Our number one objective is meeting our social mission by providing quality care. We will set the standard for quality and affordability of care . . . and improve the health of members and the communities we serve.” While certainly noble goals, these points do not represent an effective vision of the future world. A truer vision would describe what the world of their employees, members, and communities served will be like when they “set the standard for quality and affordability of care . . . improve health . . . and continually improve in everything.” Goals and strategies outline how an organization has chosen to pursue its desired future and define key markers for gauging progress toward it. They are not that desired future.

Effective visions should describe a future world where the mission is advanced and where goals and strategy are being successfully achieved in lockstep with the organization’s guiding philosophy and values. They should outline a rich and textual picture of what success looks like and feels like. Such visions paint a picture and tell a story. It is not enough to simply state where an organization is headed or what its general aspirations are. The vision should be so vivid as to enable the listener or reader to transport himself or herself to the future, so to speak, to witness it and experience it. This level of detailed description helps people understand how the future world is both similar to and different from the current one and what could be their potential role in it.

**VISION AS A STORY OF THE FUTURE**

The vision as a story can be distinguished from a traditional vision statement. The traditional vision statement is more akin to an executive summary or an abstract of an article. It is useful to have such a brief summary that captures the essence of the fuller story and that can serve as reference to it. But a vision statement without the accompanying story is nothing more than hollow platitudes, slogans, or pithy phrases that are ripe for varied misinterpretations. As mentioned earlier, the vision statements of many companies across diverse industries, with minimal editing, can be substituted for one another because they lack the descriptive context and detail of the story. They are replete with recycled words and phrases like “we will improve the quality of life for our customers,” “we will set the standards for value and quality,” “we will be the employer of choice,” and “we will be the leader in our markets.” It is assumed these phrases will evoke similar meanings for all stakeholders. However, because such
statements are so general and abstract, they actually are likely to elicit multiple interpretations from organizational members. For a vision to create shared meaning, it must project people into the future so they can readily see it in action and imagine themselves as part of it. The vision story’s use of dynamic, vivid, imagery and colorful narrative description of events, actions, and experiences helps this experience to occur.

VISION STORY EXAMPLES

I would now like to share a few examples of organization visions that illustrate this storytelling concept. Each paints a graphic picture of how life in the future is being experienced. The first example is an excerpt from the vision of a large healthcare organization describing what life in the future will be like when its new primary care model, enabled by a state-of-the-art clinical information system, is designed and implemented. This vision story is titled “Easy Access to Quality Care.” It begins,

The member, having just enrolled in the health plan completes a detailed personal health history questionnaire at a computer terminal in their home, office, or at one of the many kiosks located around our facilities. This highly interactive, point and click process is as easy for the new member to use as changing channels on their television set. The new health history is automatically entered into the system database. The new member is interviewed by a clinical team member to whom she tells of her and her husband’s desire to become parents. The clinical team member brings up the “physician database” on her computer terminal and reviews the biographies and experience of several family practitioners and obstetricians with the patient for her selection. After one is chosen, the clinical team member electronically contacts the physician’s office and arranges an initial appointment for the new member. When the new member arrives for her initial appointment, the appointment clerk greets her warmly as if she were a family member. Her entire health history is brought up online at a small terminal in the examining room for the physician to review. Following her checkup, the nurse electronically schedules her with the health education center where she and her husband are enrolled in the “Parents To Be” class. At the same time the nurse also schedules the patient’s husband for a routine physical exam to coincide with the wife’s next scheduled physician visit. During the prenatal period, if the patient fails to appear for a prenatal care appointment, the system computer automatically identifies this and electronically prompts the obstetrician’s staff to determine if a follow-up phone call or notice is needed.

Rather than espousing the concepts of convenient, quality care, seamless and attentive service, and a focus on preventive care, this vision describes the future world where they are enacted.

Another example is the vision for a newly formed shared services organization. This new enterprise was created to provide a variety of support services to various operating divisions. The start-up of this new enterprise represented a significant organization change for the larger system it was to serve. Operating divisions would have to give up their locally managed set of such services and their sense of local control and autonomy over them. Therefore, the shared services organization’s vision represented a potent tool for lessening fears and building commitment to a new way of working and relating for the entire enterprise. This vision, titled “Imagine This: Our Preferred Culture in Action,” describes two separate scenarios. One is from the perspective of the shared services employees and the other is from the perspective of its
customers. The following are brief excerpts from each viewpoint. First, from the employee perspective:

All team members have frequent and close contact with their customers. As a result, they have a deep appreciation of customer preferences and expectations and are dedicated to servicing them as if they were old, close friends. Attention to customer value guides all daily decisions and actions. Shared services team members regularly visit all operating divisions and facilities to stay close in touch. State of the art computer systems make information exchange with customers a breeze. Team members regularly scan the internet and intranet to stay current on new developments and trends in business areas of their customers. Boundaries among different customer service teams are blurred as team members from across business service areas come together frequently in ad-hoc teams to resolve customer service issues.

Now from the customer perspective:

Customers experience seamless service delivery and have a knowledgeable single point of contact from their service team. Inquiries and questions are responded to courteously, quickly, and completely. Shared services employees regularly surprise and delight their customers by anticipating their preferences and needs, and check in with them regularly to ensure their service needs are being met. Customers are called upon regularly to provide feedback about the quality of current services received and help shared services team members stay up on their emerging business needs. Customers work closely with shared services team members to develop new products and services and continuously improve service delivery.

In this example, the concept of customer-focused service is brought to life.

Both of these examples describe the desired future in such lucid detail that one can almost imagine himself or herself right there. Through the description of the actions and experiences of employees and customers, values and performance-related expectations are conveyed without making them appear prescriptive, dull, or trite. Such descriptions do not have to be fully definitive or all-encompassing. They should be suggestive and expressive enough so they can stimulate the imaginations of others. These visions are effective because they not only describe the qualities or attributes of the desired destination but also elaborate on what life will be like when it is reached. The use of present tense in such descriptions is a powerful technique because it illustrates that the future is possible because it is happening. These vision stories provide for a distinctive comparison between what is now and what could be by relating it to the real experience of those likely to be part of it. They place the listener or reader in the role of participant observer within the futurescape described. As a result, they facilitate understanding through a type of visual experience rather than merely through the conveyance of ideas.

The use of storytelling as a tool in teaching, influencing attitudes and behaviors, and promoting understanding has a long history. During the medieval period in Europe, stories were told by troubadours as a means of creating a sense of community and shared understanding (Abrahamson, 1998). Egan (1989) points to the power of storytelling as a key learning tool. She writes, “If one could code the knowledge to be passed on and embed it in a story form, then it could be made more faithfully memorable than by any other means” (p. 456). She also suggests that the story’s concrete imagery and examples help promote fuller understanding than do vague abstractions.
or generalizations. Peck (1989) suggests that the real value of storytelling from a cognitive learning perspective is that it becomes a mutual creation involving interaction and understanding between teller and listener.

The work of Erickson and Rossi and of Bandura provide some clues to the underlying psychological and cognitive processes explaining how storytelling facilitates learning and behavior change. Erickson and Rossi (1976) suggested that through storytelling and the use of metaphorical language, our habitual mind-sets, common everyday frames of reference, and belief systems are more or less interrupted and suspended for brief moments. They discovered that this suspension creates “trance-like” states in listeners during which they were open to considerations of new possibilities and learning. As a result, storytelling became a key clinical technique for the Ericksonian methods of hypnotic induction and psychotherapy. Bandura (1977) demonstrated how modeling and observation promoted learning of new behavior. He also found that vicarious learning helped build a sense of self-efficacy, or a belief that a particular course of action can be carried out. Increased self-efficacy led to increased ability to apply new learnings. The vision story can be viewed as a form of modeling. It shows people the future in such detail that it produces a type of virtual experience of it, thereby facilitating a form of vicarious learning. Through this experience, people gain an intuitive feel and visceral understanding of the desired future. This increased appreciation for the future and what it could be helps people to personalize it and assimilate the learning of new behaviors and performance expectations.

DEVELOPING THE STORY

Where do visions come from? In general, they are derived from personal aspirations and ideals. Such aspirations and ideals are based on a keen interest, yearning, and passion for something. However, interest and passion are not sufficient. One also has to be well informed to imagine what might be. While creativity and imagination certainly play a role in vision creation, it also is a product of insights derived from knowledge and experience. Health care executives would have difficulty envisioning the future world of a financial services or telecommunications company, and vice versa. However, when one has an in-depth understanding of some industry and adds to it a fuller awareness of recent developments and emerging trends engulfing that industry, the seeds of a vision are in place. Finally, courage is important—courage not only to envision the possibilities but to make the commitment to turn those possibilities into reality.

This combination of passion, experience, knowledge, and boldness are the fundamental ingredients for vision formulation. The process described below explains how to tap into these elements, create the story of a desired future, and gain the commitment of others to its realization. This process includes four major steps: (a) becoming informed, (b) visiting the future and recording the experience, (c) creating the story, and (d) deploying the vision. A case example is provided to illustrate how one organization chose to use this process to create and enroll others in its vision for the future.
The organization is a highly integrated health care delivery system comprised of a health insurance plan, more than 35 inpatient and outpatient facilities, and two large group physician practices. It offers a full range of both health insurance products and medical services to its payers and members. After many years of stellar performance that included continued expansion and spiraling revenue and membership growth, the organization faced several new business challenges linked to the changing landscape of health care. Specifically, capital expenditures and medical care costs were rising dramatically while membership growth had slowed substantially. Leadership was faced with the reality that the price advantage they had over competitors was diminishing. In addition, service responsiveness was not keeping up with the increased service expectations of members and other customers. For the first time in its history, the organization faced the prospect of losing market share to competitors who were gaining strength through mergers and other forms of consolidation. Leadership knew that significant changes were required in the way they conducted business. Yet, they also knew how difficult such radical change would be to implement in such a large organization that never had experienced such pressures for change before. While several internal analytical groups, with assistance from outside consultants, embarked on the task of building the business case for change, leadership coalesced around the need to create a new vision for the future. They wanted their strategic change process to be driven by a shared vision for the future, rather than to be simply a reaction to the mounting pressures of the marketplace.

Step 1. Becoming Informed

As an initial step, I spent time with the chief executive officer to help him crystallize his personal vision for the future of the organization. We examined his personal beliefs, aspirations, and hopes through a combination of structured and meandering discussion. Our discussions delved into who his personal heroes were and what it was about them that he admired. We explored the future business challenges he anticipated the organization facing and what successful handling of these challenges would look like, as well as what legacy he hoped to leave behind in the organization, the communities served, and the industry. Following this personal work, he shared his reflections and insights with his executive leadership team and encouraged them to build on his ideas. After considerable dialogue and debate, a common set of aspirations for the organization began to emerge.

The next step was to expand leadership team members' thinking by increasing their understanding about the key trends and developments occurring in the external environment that might shape their aspirations. These trends and developments were examined across four spheres: economic, social, political, and technological. Each was studied to be able to anticipate its implications for the organization. This was not an exercise in trying to predict the future as much as it was becoming informed enough to understand probable occurrences and think about possibilities. Before getting started, a key decision needed to be made. The time frame for the vision had to be determined. Because visions, by definition, are future oriented, time frames should be
at least 5, if not 10 or 15, years out. These executives decided to focus on a 5-year time frame, given the rate of change taking place in the health care industry and in related industries. Establishing the time frame then oriented their information-gathering efforts. Each executive began a brief research effort into current and potential trends and developments. The following questions were used to help facilitate and focus their learning efforts:

- What is happening in the world external to your organization that may impact your business?
- What trends are occurring that may affect the needs, expectations, and desires of key stakeholders (e.g., employees, customers, suppliers, etc.)
- What are other companies (within and outside your industry) doing or considering doing to prepare themselves for the future?
- What are the core values and beliefs for how business should be conducted that will not be compromised?

This last question, although not associated per se with the task of becoming educated about trends and developments, helps provide the referential frame for evaluating different options and opportunities discovered.

Once the leadership team completed its research efforts, its members decided it was time to expand the circle of the vision work. They decided to hold a 2-day large-group vision conference in which they would bring together a selected group of key stakeholders to explore many of the emerging trends and developments they had identified and expand on their original visioning work. Selection of participants was based on Weisbord and Janoff’s (1995) principle of “getting the whole system” into the room and used a modified version of their suggested selection criteria. Participants invited were people who had diverse experiences and perspectives, had the authority and resources to act, and were likely to have an investment in the future of the organization. The design of this conference was based on similar conference models and large-group design sessions discussed by Emery and Purser (1996) and Bunker and Alban (1997). One feature of this design was a variation on the “panel of possibilities” (Jacobs, 1994). This panel was composed of recognized authorities from the areas of health care, technology, and population demographics, as well as futurists. Following the executive team’s brief presentation of its emerging thinking about the organization’s future, the panel members discussed their views of the possible shape of that future. They offered a variety of perspectives and observations about medical research developments, new technologies, business and organizational trends, government and regulatory policies being considered, and shifts in demographics occurring in the organization’s various service areas. Following the panelists’ presentations and a question-and-answer session, participants broke into smaller mixed groups for discussions about the potential possibilities and implications for the organization based on what they just heard. The ideas generated were documented.

In addition to looking forward, the CEO decided it was important to also revisit some of the organization’s history. Many Native American peoples share a strong belief in the circularity and perpetuity of life. The Navajo, for example, have a tradition of reenacting and examining the past prior to making any decisions about the future.
This assures them of the linkage and continuity between past generations and future ones. This concept can be readily applied to vision development. During the second half of the first day, the CEO and members of the executive team shared various archival company documents and recounted significant events and personal recollections related to the early vision for the organization. Two retired past senior executives were invited to participate in these discussions. The purpose was to ensure a shared understanding of the original purpose, aspiration, and unique sense of calling possessed by the founders. Before adjourning, participants explored how these founding ideals could be built on or adapted to meet the challenges and opportunities they had identified earlier. A common view for what was considered vital to carry forward into the future began to emerge. This type of process is similar in many respects to the principles of appreciative inquiry (Cooperrider & Srivastra, 1987), because of its emphasis on affirmation and identification of those highly valued aspects of the present that should be taken forth into the future. This examination and recapturing of the past and appreciation of the present is an important part of vision work because it helps ensure continuity between the organization’s past and future. Such continuity helps mitigate the enormous disruption and sense of disconnection and loss created by major organization change.

**Step 2. Visiting the Future and Recording the Experience**

The second day of the vision conference was convened a week later to develop the vision. Through various structured exercises, participants were asked to project themselves 5 years into the future. They were told that their organization had just won an award as one of the most successful organizations in the world and that several business publications were featuring various cover stories about their organization. Their assignment was to generate the content of those stories by considering the following questions:

- What is the organization’s reputation? What is it known for?
- What do competitors respect and envy the most?
- How and where are employees performing work and serving customers?
- What is the customer’s experience?
- What major contributions have been made to the communities worked in and served?
- What are employees saying to their closest friends and family about what it is like to work here?
- What new businesses or ventures have been pursued?

After participants jotted down their ideas and shared them with each other, they were asked to expand their ideas into images and scenes depicting their possibilities in action. The idea was to generate as many of these as possible. Each participant was given 5×8 index cards to record their images and scenarios. Prior to the idea- and image-generation work, we used several creativity exercises to help the group members loosen up their thinking. One such exercise asked participants to generate new uses for a warehouse full of empty tea bags. A good resource for a variety of creative thinking activities are the two books written by Van Oech (1983, 1986).
The index cards were then put up on the wall and sorted into clusters of similar images and ideas. Once participants agreed to the general clusters, each grouping was given a heading that captured the theme of its contents. After participants reviewed and discussed all the images and scenarios, they formed new small groups and generated an additional round of ideas or expanded upon the ones already described. These were recorded, presented, and discussed. A subgroup was then formed and assigned the task of writing the vision story. The subgroup was made up of volunteers from the larger group. A conscious effort was made to ensure its members represented a cross-section of the organization and that there was representation from formal leadership. Another criterion to consider when forming the story-writing group is who are considered informal leaders within their respective organizational constituencies. This is important because members of this subgroup are likely to be called upon later to assist with the vision deployment. In this case, the group included a member of the executive team, a physician manager, a nurse, a marketing manager, a member services manager, and the executive leader of the public relations and communications function. I served as the consultant and facilitator in this group.

Step 3. Creating the Story

The vision story should be written in narrative form and describe the situations, the actors, the actions being taken, and the consequences of those actions. While vision statements are typically an endless stream of nouns, the vision story freely uses verbs. Actors and actions are emphasized. It is more difficult to commit to abstract concepts like service or quality than to the specific behaviors that comprise them. Analogies and metaphors are useful techniques to enrich the story and facilitate understanding. For example, saying “customers are treated like members of our family,” “employees run the business like they own it,” and “new technology is applied as easily as slipping on a well worn shoe” help make the future scenario seem more familiar and understandable.

The vision story-writing subgroup began its task by outlining the key messages and themes that the story should convey. These reflected the headlines given to the clusters of images and scenarios generated during the prior large-group work session. The subgroup’s themes included customer focus, quality care and service, employee strategic mind-set, community wellness, partnering, and continuous learning and innovation. These are typical of the bland language used in traditional vision statements. However, in the vision story, they are brought to life. Effective vision stories share the following characteristics: They are narratives of not more than 1,500 to 2,000 words that recount and chronicle actions and events. They are written in the third person so that the reader/listener is placed in the role of an observer who is catching a glimpse of the desired future. A technique used by fiction writers can help enhance the story writing. They do not directly tell the reader about a character in the story. Instead, the reader learns about a character through the literary device of characterization. Character is brought to life through description, action, and fly-on-the-wall detail. The vision story employs a similar literary device by providing specific behavioral examples of the key messages or themes rather than by stating them explicitly. For example, rather than
telling the reader or listener the future will be characterized by teamwork and collaboration, the vision story describes such principles in action. “Groups of employees come together frequently and informally to exchange and explore ideas for how to address emerging business issues. As soon as individual assignments are completed, everyone checks where they might lend a hand or support to another.” The story needs to be written in enough detail so the future world is described at ground level, where most employees can relate to it. The descriptions also should be strongly linked to current situational realities as much as possible to convey familiarity and help people translate the future to their present experiences. The use of the organization’s distinct language, including acronyms and slang, as well as embedding existing organization traditions and rituals in the story, helps bridge the present and future and make the new more familiar. For example, in this organization, employees are called “staff members,” so that is how they are referred to in the story. Because customers include group payers, members, and patients, that is what they are called in the vision story. Additionally, key traditions and rituals that are desirable to carry forward into the future also can be referenced and used as the context or setting for segments of the story. One such ritual for this organization is a formal dinner that commemorates years of service to the organization. In the vision story, this service awards tradition is expanded to include public recognition of extraordinary efforts of customer service in addition to tenure.

The story should be written in the present tense. As described earlier, this helps convey that the future being described is achievable because it is in fact happening. Most writers will agree that vivid description taps into and pulls together as many of the five senses as possible. Describing the marketplace as a place where the “boundaries of our competitors and partners are blurred” or “where customers grasp for the services that quickly meet their needs” uses the senses of sight and touch. Use of figures of speech, including similes, metaphors, and hyperbole, is an additional effective storytelling technique. Comparing effective teamwork to a “well-oiled machine,” describing a significant change process as a “journey,” or stating that “all employees always do whatever it takes to delight their customers” are examples of these techniques. Finally, the vision story should be upbeat and optimistic. The following questions helped guide the subgroup’s story-writing process:

- What is going on in the marketplace and external business environment?
- How are employees interacting with customers? How are services being provided?
- What is the mood of the workplace?
- What are employees and customers and other stakeholders experiencing and feeling?

Deploying the Vision

Creating the vision story is just the beginning of the effort. Now it needs to be taken forward for discussion, examination, and refinement. Like circular waves generated by throwing a pebble into pond, the vision’s circle needs to be continually expanded beyond the center or core cadre of those who helped develop it. Wheatley (1992) described vision not simply as a destination to seek but as a field that permeates the entire organization, affecting all who bump up against it. Taking the vision forth and
engaging others in its exploration helps build this field. Vision deployment is an ever-expanding process where people are brought together to discuss the future as described in the vision story and invited to add their personal aspirations and hopes to it. Members of the executive team in partnership with several participants of the story-writing subgroup took the vision to different constituencies within and outside of the organization. They were coached to serve as spokespersons for the vision and to avoid falling into the trap of telling it, selling it, or defending it. Such posturing is likely to engender reactions of cynicism, criticism, and opposition. Rather, the spokespersons should strive to engage others in a true conversation and further inquiry about the vision. They should explain the assumptions that were held during its generation, the options considered, and how choices were made. Most important, they need to listen attentively to how others interpret and respond to the vision. The input and feedback of others should be actively solicited, appreciated, and seriously considered. A critical success factor for this type of dialogue about the vision is the openness and flexibility of the leaders who participate in these sessions. They have to have a strong commitment to exploring ideas, an understanding of the responses of others to those ideas, and a willingness to consider different viewpoints. The objectives for these conversations are to refine and enrich the vision, as well as to understand how others interpret and react to it, not to force acceptance or consensus. Bringing new groups of people into this conversational process helps facilitate the cocreation that is essential to building a shared commitment to a shared vision. In large organizations, it is unrealistic to try to engage all stakeholders in this process. The number of people to involve and who to involve are ongoing dilemmas to struggle with in this type of effort. At a minimum, a sample of people from different business units, geographies, and organizational roles should be targeted for involvement. And the opportunity to participate should be given to those who would like to have it. Advances in computer technology create interesting opportunities for involving people in this process in different ways. For example, intranet-based discussion databases and chat rooms can be set up as adjunct means for interaction and an exchange of views.

Each team of vision spokespersons was assigned to take the vision to different business units, departments, and stakeholder groups within the organization for dialogue and learning. Because the delivery of health care is a 24-hour-a-day business, the teams ensured that frontline staff from all three shifts were given the opportunity to participate. The teams used a variety of formal and informal sessions, including town-hall meetings, brown-bag lunches, department meetings, and training sessions, as part of their overall deployment strategy. The only principle that each team committed to was ensuring that all sessions were interactive. Regardless of the type of session, the following meeting structure was followed: First, the spokespersons explained the purpose and desired outcomes for the discussion. Second, the rationale for why a new or refined vision was necessary was presented. This allowed some discussion of the business case for change. Third, a brief summary of what work had been completed to date, including who had already contributed, was reviewed. Fourth, the nonnegotiable parts of the vision were identified and explained. In this instance, nonnegotiables included the core values and operating principles expressed in the story. Fifth, the story was presented by distributing it for people to read. Finally, a conversation was carried out
where ideas and concerns were explored, questions examined, and suggestions noted. The following questions served to facilitate dialogue and structure the group discussions:

- What specific images or feelings emerged for you as you listened/read it?
- What key messages does it convey to you?
- What needs further clarification, explanation, or elaboration?
- What if anything is missing from it that you believe is important to include?
- What do we need to do to translate this vision into action and make it a reality for our organization?

Based on the input and feedback received, the vision story was further refined by the leadership team. Not all input made its way into the vision story. The leadership team reserved the final say as to what was added or modified. The members’ discussion of suggested inputs and refinements was often heated. Yet, their systematic assessment of the input received helped them further clarify their own intentions and sharpen their sense of the vision.

Building a shared commitment to a shared vision for the future is not a one-time effort. The vision must be updated and refined continually as time passes and the future itself comes more into focus. In this sense, vision development and deployment are never fully completed. Visions need to be reexamined, updated, and recast periodically. As such, vision work needs to be construed as an ongoing work in progress. The leadership of this organization committed to reexamine the vision in 2 years. Yet, even viewed this way, the vision story serves the important functions of providing guidance, direction, and a sense of common purpose for organization members.

Efforts were then initiated to institutionalize the new vision within the organization’s management and operating structure. Organization goals, performance targets, and business strategies were developed from the vision. Several task forces were formed with the charter to examine key business processes and determine the extent that redesign efforts were required to align them with the vision. Quarterly performance measures were established as concrete milestones along the journey to realizing the vision. Formal organization communications reporting performance and recognizing achievements against targets continuously reminded people about the context for their efforts—the vision. The executive team members examined all strategic decisions they were contemplating to ensure their alignment and support for the vision. Finally, as part of the organization’s orientation program, the vision story was discussed with all new hires.

In today’s whirlwind business environment, leaders chant “speed” as their new management mantra: speed to anticipate, speed to adjust, and speed to respond. This creates enormous pressures on leaders to align people for collective and focused action toward new directions at increasingly accelerated rates. This can only be accomplished by captivating the entire person. In short, the heart needs to feel what the head is told. A well-conceived and articulated vision offers the promise of serving as both a springboard and a frame of reference for fueling such aligned action. Yet, the
traditional vision statement with its abstract, lofty, and generic language fails to fulfill this promise. Rather than engaging people in the real possibilities for the future, it creates an intellectual and impersonal distance. It fails to excite the imagination or evoke the emotion required for enthusiastic and devoted action. The vision story, on the other hand, with its rich imagery and vivid description, is more effective in fulfilling this promise. The vision story provides people with a lifelike glimpse into the future of possibilities and directly answers the fundamental question: What will this future mean for me? Vision alone does not ensure organization success. Without disciplined and focused execution, vision is nothing more than a dream. The vision story represents a potent mechanism for compelling and guiding such execution.

REFERENCES