

preparing for the

vision discussion

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Right thinking

Asking clients to articulate the change they want to see in the world and the distinctive role they will play in creating that change brings a vision discussion back to what really matters and leads to outcomes that teams feel passionate about.

But how do you get started on vision discussions?

Leaders need to be cognisant that their perspective of the organisation may be very different to that of other stakeholders.

Gaining broad input – through, for example, case studies, customer insights and staff engagement – can help stimulate your thinking.

In the December 2015 edition of Right Lane Review we described our approach to creating compelling company statements (Levy & Pappas 2015). With our social sector clients, rather than asking them to describe their vision, we like to ask them to articulate the change they want to see in the world and the distinctive role they will play in creating that change. We've found that this approach brings a vision discussion back to what really matters and leads to outcomes that they feel passionate about.

However, many boards and executive teams feel uncertain about where to start the process.

One good starting point is understanding who should be involved. Will the executive alone develop a recommendation to take to the board, or will it be a collaborative process? Will the whole leadership team be involved at every step or are we comfortable with ideas being progressed by a working group? Should we consult more broadly or should this be a 'captain's call'?

We suggest getting broad input at the start of the process, taking the board and leadership team on the journey together, but being clear as to who will ultimately decide on the vision once a broad consensus has been reached.

Leaders need to be cognisant that their perspective of the organisation may be very different to that of other stakeholders. Getting input from staff, customers and others can be very useful in informing the discussion.

Right Lane uses five techniques to kick start vision discussions and stimulate new ideas.

1. Reflections from our 'founding fathers'

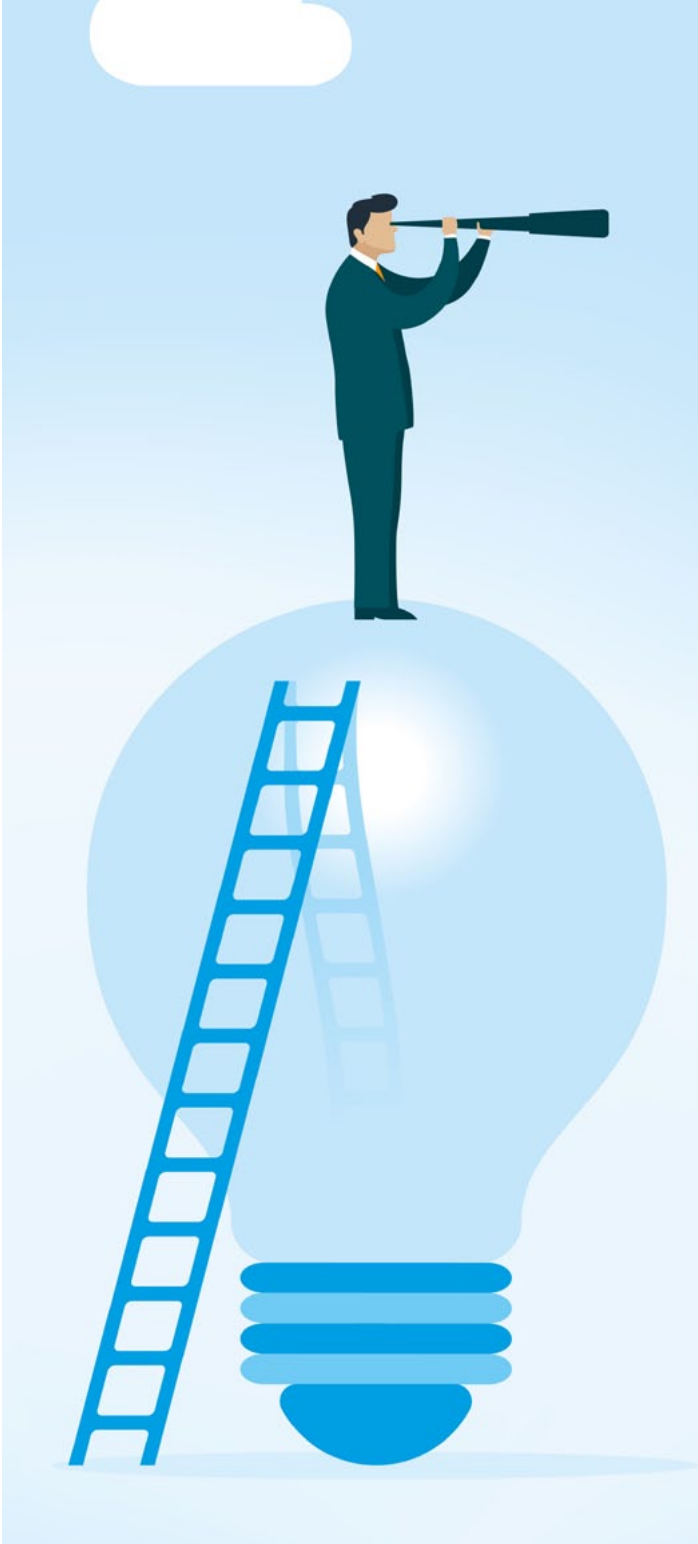
Conduct interviews or review documents to gain insights and reflections as to why your organisation was started in the first place. How has the organisation changed over the years? What aspects have remained consistent? If possible, video the 'founding fathers' to bring to life the passion that surrounded the founding of the organisation.

2. Online surveys

Conduct a survey of the board and executive team to understand how your leaders think about your organisation. Performing the survey online allows everybody to share their thoughts independently of the influence of others. Questions could include: What do you think your organisation does well? Why does your organisation exist? What do we really care about?

3. Vox pop videos

Film staff as they arrive in the morning and get off the cuff responses. What gets you out of bed in the morning to come to work? Who is your organisation? What do you think your organisation does well? This can easily be recorded on a smart phone and curated with free editing software.



Good company statements are not only galvanising, they support alignment, better decision making and more purposeful action.

4. Case studies of excellence

Develop case studies of similar organisations that are excelling in living their vision and being true to their core purpose. Try to go beyond the corporate statements to interviews with the leaders of these organisations to get to the heart of their success.

5. Customer insights

Interview your customers to identify their purpose – what drives them to do what they do? Ask them what they value about your organisation and why? Talk to front line staff and understand their perspectives on customer motivations.

In the last few months Right Lane has seen a groundswell of organisations coming to us to assist in developing their vision or purpose statements.

Discussions about company statements can go awry, but with someone who knows what they're doing leading the effort, careful preparation, and sufficient time and effort invested in the process, they can be energising for an organisation. Good company statements are not only galvanising, they support alignment, better decision making and more purposeful action.

References

Levy, M & Pappas, Z 2015 'Create compelling company statements: A new approach for the social sector', *Right Lane Review*, June

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want to know more?

If you would like Right Lane to help you develop your company statements, contact **Debbie Williams:**

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About Right Lane

Right Lane is a flourishing, top quality, ethical management consulting firm.

We employ our distinctive ideas and processes, and our absolute commitment to delivery, to help clients we care about pursue their inspiring missions.

We work alongside clients who do great work within the sectors they operate, and we are excited to be involved in creating outcomes that truly make a difference.

We are an ethical consulting firm with a strong belief in the work we do, and with a passion to give back to the broader community with the skills and expertise available within our walls.

Right Lane was established in 1997 to help private, not for profit and public sector clients to clarify and accelerate their future plans. Over the past 17 years, we have helped the executive teams and boards of more than 100 organisations to define and adapt their direction and strategy, identify and clarify their priorities, align their efforts with their aspirations, get their major projects started and finished, and measure and improve their performance.

Our areas of focus

- Developing and managing strategy and planning processes for clients
- Leading strategic growth projects, such as pre-merger analysis, pricing, new product feasibility, marketing expenditure effectiveness and growth options evaluation
- Implementing strategy through aligning and engaging the organisation, and measuring and monitoring performance
- Assisting clients with governance projects – from board culture and capabilities to board appraisals and reviews

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In 2015 Right Lane became Australia's first B Corp certified strategy consulting firm.

This follows Right Lane's decision in 2011 to adopt 'for benefit' principles, including reasonable returns, inclusive ownership, stakeholder governance, transparency, and social and environmental responsibility. Capping our return on shareholder funds at reasonable levels, rather than seeking to maximise financial returns, has allowed our firm to pursue our purpose to contribute to a better society by helping organisations that do good, do better.

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