The Vision Story: Launching Your Organization into an Actionable Future

Ira M. Levin, Ph.D.

Contact Information:
Ira M. Levin
Levin Consulting Group LLC
Email: levinconsultinggroup@comcast.net

Storytelling has been recognized as potent communication device. For centuries, across civilizations it has been used to pass on traditions, teach, inspire, and persuade often while entertaining. Stories make information easier to remember and more believable. A well told story has the capacity to be remembered long after specific facts and figures may be forgotten (Sunwolf & Frey, 2001; Neuhauser, 1993). It does so by engaging listeners' visually and emotionally in the sights, sounds and feel of the context being described. Stories provide people with a common, shared experience. Research has confirmed storytelling's capacity to promote learning (McDrury & Akterio, 2002; Koenig & Zorn, 2002; Blake & Bartel, 1999; Collins, 1999), healing (Bavelas ,Coates, & Johnson, 2000; Bruenig, Garrity, & Barris, 1997; Divinyi, 1995; Guille & Boersma, 1992), and has been recognized as an useful management tool (Brown, Denning, Groh, & Prosak, 2005; Boyce, 1996).

 It has been ten years since I wrote leaders needing to articulate a vividly descriptive narrative of their vision for a desired future of their organization. I argued that the more commonplace organizational vision statement was not sufficient to achieve the benefits attributed to a vision in organizational life (Levin, 2000). These benefits include providing clear direction, focus, a sense of meaning, and motivation to organization members. Well articulated visions also can clarify performance expectations and standards, as well as serve as a reference for strategic decision making. The limitations of typical vision statements are that they tend to rely on vague phrases, clichés, buzzwords, and management-speak. As a result, they take on the banality of a bumper sticker. My review of the published vision statements of over 30 companies across a variety of industries discovered their use of very similar wording and phrases. These include statements like "be acknowledged as the market leader," "be admired as the best organization in the world," set the standards for product quality and customer satisfaction, and "achieve sustainable growth and maximize return to our shareholders." One can almost randomly substitute one company's vision statement for another with only slight editing to accommodate differences in the nature of their business. While such vision statements may fit comfortably on pocket sized laminated cards or placards to be hung in the company offices, in this form they do not offer the personal connection required to galvanize the personal aspirations and rally the energies of organizational members sustain concerted effort toward achieving the desired future.

Instead, in my prior article I recommended that leaders develop and articulate a vision story. The vision story goes beyond simply declaring intent to achieve some future state. Instead, it describes that future state in operation so people can experience it and imagine themselves as a part of it. The vision storyteller serves as the guide into this future state pointing out preferred actions and practices, feats aspired to, and results achieved. The vision story is a compelling way of conveying highly valued, yet abstract organizational operating qualities such as innovation, customer service, and teamwork. Vision stories need to adhere to the widely acknowledged key requirements of an effective vision. These include clarity, realism, credibility, boldness, attractiveness, action-oriented, and future-focus (Kotter & Cohen, 2002; Lippitt, 1998; Nanus, 1992).

Here is an excerpt from the vision story of a large integrated health care system that was striving to gain market growth by providing consistent access to high quality, affordable care:

> "It is ten years from now and we have been awarded the highest recognition for revolutionizing health care in the U.S. We organized a multi-day virtual conference of attended by our members, employees, and other stakeholders. Attendees include the Public Health Officials representing the communities we serve. These government officials speak first about how their partnerships with us have positively impacted the health and well being of their community. Several note how the infant mortality, heart disease, diabetes, and other chronic disease rates have dropped significantly due to our community based wellness programs. They also rave about the success of our new community based health care clinics that offer a range of cutting edge services including preventive care and fitness programs. These are provided in shopping malls, airports, restaurants, and supermarkets. Patients and their families talk about how their easy access to physicians and other health professional for care sought. They express their satisfaction with our new web-based video technologies that provide them access to physicians and other medical specialists without leaving their homes. They also discuss the comfort and convenience of their hospital stays during which they personalized attention and compassionate care. Many of these patients speak in their own language, a convenience to which they have grown accustomed since we had implemented our new individualized patient care strategy where staff converse with patients in their native language and honor their cultural customs and traditions…"

Where do such visions come from? Generally, they emanate from personal ideals, hopes, and aspirations, combined with the ability to imagine new possibilities. However these are not sufficient. One also has to been well informed to conceptualize what might be. Creativity and inventiveness play a role in vision creation, but it is also the product of the synthesis and of disparate information. Knowledge of one's industry's recent developments and future trends is important. In addition, it is useful to learn about new developments and emerging trends occurring outside of one's immediate business domain. Courage and audacity are important to not only stretch the range of possibilities, but commit to turning such possibilities into a new reality.   Visions also need to develop a shared commitment among diverse stakeholders of an organization. Senge, Kleiner, Roberts, Ross, and Smith (1994), among others, have long stressed the need for engaging key stakeholders in a participative process of conceptualizing key aspects of the vision and translating that vision to the ground level where it has meaning in their daily work lives. This requires an iterative process of multiple structured and semi-structured conversations among organization leaders, between the leaders and the organization's membership, and among the membership themselves.   What follows is an overview of broad based participative process I have used with numerous client organizations to develop and implement a shared vision story.

Step 1. Scanning The Landscape
The senior leaders of the organization need to perform Initial work individually and collectively. This work involves crystallizing and articulating personal values, hopes, and aspirations and then using dialogue techniques to reach shared understanding and agreement about a generally desired, constructive future for their organization.   Next they engage in a learning process of becoming educated about the key trends and developments happening in all realms

of the external environment in which their business operates. These include the social, economic, technological, and political domains as well as what is occurring within their respective industry.   Leaders can do this by conducting their own research and tapping into subject matter experts. One way of doing this is convening a panel comprised of diverse experts and futurists to explore and debate emerging trends. The purpose of this work is learning about probable occurrences that may affect the business and offer it new possibilities. Once the leadership team completes this work, it is time to expand the circle by engaging multiple stakeholders in sharing what has been learned. This can be done by bringing them together in a series of large and small working sessions to further refine the range of alternative aspirations.

Step 2. Shaping A Desired Future
While the scanning work generates a broad understanding of the factors that may affect the organization's future business world and opportunities presented, the organization's own mission and values serve as the core frame for creating the vision story. The vision story needs to demonstrate the consistent and diverse practice of organizational ideals and values. This work is best accomplished in a series of large structured, facilitated meetings comprised of diverse stakeholders (Bunker and Alban, 1997). The first task in building the story is generating the overarching plot themes. Plot themes often reflect key value propositions that an organization believes will provide it a distinct competitive advantage in the future marketplace. Such themes might include: providing customer value, growing the business, leveraging changing technologies, empowered and engaged employees, and operating efficiency. Mixed groups of stakeholders identify and discuss actions, incidents, and other scenarios that depict and perhaps contribute to a given plot theme. These ideas are shared across groups and agreement is reached on a final set of depictions for each plot theme. The key questions driving the discussions include what is happening, how it is happening, and what impact results.

Step 3. Creating the Vision Story
Commonly a small group is convened and tasked with writing the vision narrative. While vision statements are often a near endless stream of nouns and adjectives, the vision story freely uses verbs. Actors, their actions, and the result of those actions are emphasized. Vision stories are written in the third person present tense so that the listener/reader is placed in the role of observer catching a glimpse of the desired future in action (Levin, 2000). They should also tap into multiple senses as much as possible. Vision stories use the common literary device of characterization to convey its messages. It does so by describing specific behavioral examples of key aspirations and values. For example, rather than telling the listener or reader that customer service is key future operating value, the vision story might describe the following scenario.

> *"A customer brings back a product purchased for return. She is greeted with understanding and the payment is simply returned without inquiring about the reasons for the return. We then ask if we might help him/her find another more suitable product to meet her needs."*

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The vision story needs to be written in enough detail so the future is described at ground level and illustrates common occurrences of daily work-life.   Use of analogies and metaphors can be very useful. For example, the work of a new product development team might be compared to setting sail on a journey where a course has been charted but the final destination is not yet known. Or, a sales team might be compared with a basketball team in the midst of a fast break where roles are fluid and exchanged freely, but the effort is well coordinated with a single goal in mind.

Step 4. Expanding and Deploying the Vision
Creating this initial draft of the vision story is just the beginning. Now it needs to be taken out to all key stakeholders discussed, examined, and refined. Creating a shared vision requires ongoing dialogue.   In particular, different stakeholder groups need to translate its application to their daily work. In doing so, they should also be encouraged to add in their own aspirations. Bringing new groups of people into this conversation helps promote co-creation and consensus building.   Often those involved in the initial creation of the vision story are the ones who take it out to others. These storytellers need to avoid the trap of telling or selling the vision. Instead, it's important for them to assume a learning posture by soliciting and exploring reactions with the intent of gaining and building shared understanding. The primary objective of these conversations is to refine and enrich the vision, as well as make it come alive for the members of each and every stakeholder group and area of the business. Different business divisions or departments might be tasked with writing their own version of the vision story that reflects their distinct area of the business while remaining true to the key themes and messages of the story. Based on the feedback and input received, the vision story may be rewritten and ultimately published. Yet this is not the end of the process. Visions are not static entities carved in stone. Rather, they need to be reexamined, updated, and recast periodically as external and internal conditions change.   Institutionalizing the new vision often requires redesigning key business processes and practices to ensure they reflect and promote the aspirations conveyed in the story.   This may include developing new business strategies, redefining accountabilities, establishing new performance metrics, reward systems, new competency development, and reshaping the organizational culture to actualize the vision. Departments and work groups can examine their current operating norms to determine which ones may require some modification or replacement to enact the desired future.

A well conceived and articulated vision offers enormous promise as a launching pad and guide for mobilizing inspired performance and aligned action across an organization. Yet, the traditional vision statements fail to fulfill this promise because they tend to be too general, vague, and impersonal. The vision story with its rich imagery, vivid description, and greater specificity offers a more effective means for demonstrating what future success is being aspired to and most importantly how organizational members can contribute to achieving it.

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