

How to Create an Authentic and Compelling Vision



Leader's Guide to Creating a Breakthrough Vision Statement

ONE
PAGE
PLAN

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Creating a Vision Statement

What are you building?

*“If you don’t
get the words
right...
you might
build the
wrong
business!”*

Everybody is building something... a company, an organization, a department, professional practice, a non-profit*. Well-written Vision Statements answer the question: What is being built?... in three sentences or less!

The question for you is what are you building? What do you want your business to look like in 1, 3 or 5 years? An effective Vision Statement need not be long, but it must clearly describe what you are building. A few key words will go a long way.

Vision Statements answer these questions:

- What type of business is this?
- What markets does it serve?
- What is the geographic scope?
- Where will the business be located?
- Who are the target customers?
- What are the key products and services?
- How big will the company be... and when?
- What will revenues be?
- Will it have employees? How many?

Almost everyone has a Vision for their company, but some are better at articulating it. Many people struggle with capturing their Vision effectively in writing. At The One Page Business Plan Company we have learned that with a little prompting, most entrepreneurs, business professionals, executives and owners can capture the essence of their Vision in just a few minutes.

A Simple Formula for Writing a Vision Statement...



Here are some examples using this formula:

Ezme Designs	Within the next 5 years, grow Ezme Designs into a successful international ceramics, housewares and lifestyle company, with annual sales of \$15 million providing unique, handmade, quality designs of tableware, jewelry and sculptural ceramics to art conscious men and women, retail stores, catalogs, craft galleries and internet shoppers.
Harps, Etc.	Within the next 3 years grow Harps, Etc. into a \$20 million international harp sales and accessories retail franchise company providing new and used harps for sales, rental, franchise and instruction, plus accessories and services to professionals, students, teachers and aficionados of the harp.
Suit Your Fancy	Within the next 2 years grow Suit Your Fancy into a \$500 million, successful national home-based party-plan retail sales business providing high quality stylish and comfortable women's clothing and offering valuable entrepreneurial opportunities to incredibly motivated women in all ages and stages of life desiring to create their own business successes.
East Way Yoga	Within the next 3 years grow East Way Yoga into a \$10 million Northern California provider of on-site workplace yoga classes, inspiring companies and their employees to create a satisfying and fulfilling work/life experience by transforming their moment-to-moment awareness. We will also create and sell new yoga-related DVDs locally and online to support the ongoing practice of living life more fully through yoga.

Crafting a Vision Statement

Getting the first draft onto paper is always the most difficult. It is infinitely easier to edit! The fill-in-the-blanks template below is geared to help you quickly create a first draft. Each blank in essence is a question; complete all the blanks, and you create a first draft... quickly and easily! Not able to fill in all of the blanks at this time? Don't worry... complete those that you can! Revisit the blanks later, you may need to do some research or enlist help from others.

Vision Statement

Within the next _____ years grow _____ into a \$ _____
(company name) (est. annual sales)

_____ company providing
(geographic scope) (type of business)
(local/region/nat'l/int'l)

(list 2-3 of your most successful products/services)

to _____
(list 2-3 characteristics of your ideal clients/customers)

The following Vision Statement was created using the fill-in-the-blanks template and then edited. It is brief, but very clear.

In the next 3 years, grow VHS Engineering into a \$350 million international wireless technology solutions provider capable of designing, building, and hosting leading edge wireless products and networks throughout North America for corporations with a minimum of 1000 employees.

This exercise is designed to help you brainstorm the Who, What, Why, When, Where and Hows for your business. Review the questions, write down your initial thoughts, insights and ahas. Writing outside the boxes is allowed and encouraged.

WHAT?

Services or products? or both? How many?

Company image: What will this company be known for?

Owner's Role: What is your role? How will you spend your time?

WHERE?

Company: Local, regional, national, or international?

Clients/Recipients: Where are they? What cities, states, countries?

Business Operations: Headquarters, offices, program locations, etc.?

WHO?

Customers: Who are they? What needs do they have?

Staff: Who needs to be on your team? When

Strategic Alliances: Who can you partner with?

Advisors: Who can provide professional and strategic advice and help you grow this business properly?

Creating the Business You Want

Don't worry about answering all of the questions; they may or may not apply to your business.

WHEN?

Start-up: When will this business be operational?

Facilities: When will office/manufacturing/distribution space be required?

Systems: When must they be selected, tested, and operational?

WHY?

Owner: Why am I creating this business?

Customers/Clients: Why will they buy these products or services?

Investors/Bankers: Why will they fund this business?

HOW?

Funding: How will this business be funded?

Culture: How do you want to interact with customers, employees, vendors?

Personal Beliefs: How will your personal beliefs impact this business?

Crafting a Vision Statement for a Department*

If your company has support functions, have each of your managers create a Vision Statement for their department. This template will make creating the first draft easy.

Department Vision Statement Template

Within the next _____ years grow _____ at _____
(1, 3, or 5 yrs) (department name) (company name)

into a successful provider of _____
(describe services and/or functions)

to _____. Future capabilities/capacity
(name internal/external customers)

will include _____.
(describe capabilities/capacity)

**For larger/established companies*

Department Vision Statements that Work Together

Well written Vision Statements at the department level answer the question, "What will this department look like in 1, 3, or 5 years?" The Vision Statements should provide a sense of the services and/or function that the department will be providing within the planning horizon indicated.

Here is an example of a set of integrated Vision Statements for one company:

Consolidated Plan	Within the next 3 years, build a \$150 million global wireless applications solutions company serving the financial services, health care and transportation industries.
Sales	Within the next 18 months, build a national external sales department consisting of 20 senior sales reps focused on large custom system sales supported by a highly effective telemarketing function with 6 specialists selling packaged products & limited consulting services.
Marketing	Over the next 3 years, expand Marketing to include market research, product development & marketing communications depts.; total staff: 10 professionals + 5 support. Continue to outsource PR & Advertising.
Engineering & Technology	Over the next 3 years, build a state-of-the-art technology center with an engineering team of 30 professionals capable of designing, building, & hosting leading edge wireless products and services.
Human Resources	Build a highly motivated and effective global workforce of non-union employees and independent contractors to support a rapidly growing company. Internal HR staff will consist of 6 employees.
Accounting & Finance	Build highly efficient accounting system/function that seamlessly integrates all of the business' financial, operational, customer & management processes. Total head count in 3 years of 20.

Feedback Exercise

Reflect on your Vision Statement for a few days. Then consider sharing your Vision Statement with at least two people and asking them for their feedback. Use this page to take notes.

First Person Feedback	Second Person Feedback
Note here key words and phrases from above or other sources you would like to use in your own Vision Statement:	

Next Steps for Your Vision Statement

- 1 REVIEW:** Does your Vision Statement answer these questions?

VISION STATEMENT QUESTIONS:	YES/NO
What type of business is this?	
What markets does it serve?	
What is the geographic scope?	
Where will the business be located?	
Who are the target customers?	
What are the key products and services?	
How big will the company be... and when?	
What will revenues be?	
Will it have employees? How many?	

- 2 REFLECT:** Assuming the reader knows nothing about your business, does your Vision Statement clearly answer the question: *What are you building? Ask yourself... Is this the business I want to build?*

- 3 SHARE:** After reflecting on your Vision Statement for a few days, consider sharing your Vision Statement with at least two people and asking them for feedback.

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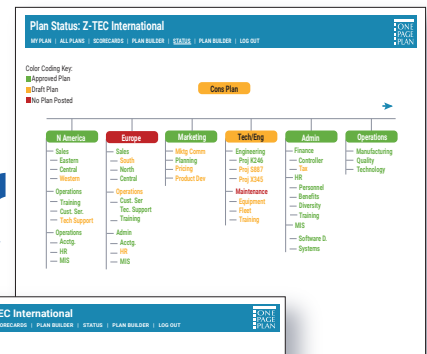
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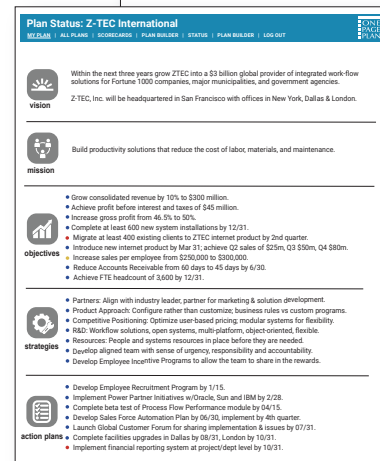
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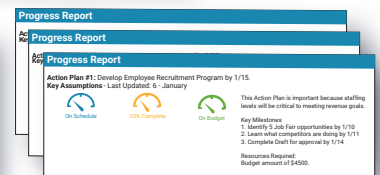
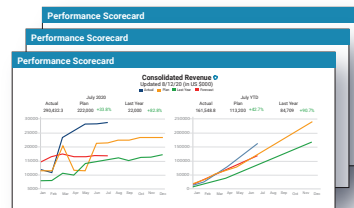
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