

Leading Ways: DEVELOPING AND USING VISION

Over two decades ago, my friend and colleague George Sweazey and I developed the basic leadership formula; $L=V+T+R$. The formula simply states that **L**eadership occurs when you mix **V**ision with **T**ask and the right amount of **R**elationship.

Lately most of the leadership work I've been doing has been focused on relationship or task concerns and I realize I've gotten a bit away from vision work. So, this month's missive is a review of some practical points about vision for leaders, how to develop it and how to use it.

WHAT IS IT?

There are many ways to define vision, but basically it is a coherent direction for an organization, unit, project, team and even individual. Humans like to understand things and we have evolved a strong taste for order and predictability, this comes from our skill at pattern recognition. Vision helps us value what lies ahead because we can see it in our minds. And when needed, it can also help us detach from the current pattern and take up the new innovative one.

Vision does three types of work for leaders. First, it **defines**. Vision helps us understand what we do and what we have done. It clarifies and holds up our values, oftentimes needing to show how these values evolve as times change. Vision also defines the strategies that will take us in the direction we need to go.

This defining work is essential to the next function: **alignment**. For most of us we are aligning the work of a particular unit, department, clinic, or function to the overall organization. A vision also aligns the future work of the organization to be consistent with that vision. It becomes a reference point informing the future actions of individuals and, perhaps more importantly, making the collective action of teams and work groups easier and more effective, because a common direction, purpose and motivation have been established. It is also a signaling mechanism to external stakeholders about direction, strategies and values. It lets them know if they should cast their lot with us.

Vision must also motivate and **inspire** action. Several elements need to be combined to move the projected image into action. Future goals should be practical and imaginable; not distant and farfetched. John Kennedy's classic vision of sending someone to the moon and bringing them home was an outlandish projection, but it was done in a way that made it seem possible. To be inspiring the vision must also connect to the underlying culture and values of those that must be moved to action. To get most individuals engaged with the work of a team or organization it is essential for them to know how they add value to the work that is being done and that they understand and believe in the ultimate value of that work.

Visions are usually about change. Good visions combine these in the right balance for the particular moment or challenge you are facing. With that in mind, there are five guiding elements that go into having vision.

MISSION

The mission is the leader's understanding of the purpose of the organization. Often found in a mission statement, it is actually much more fluid than many people would like to think, and it can take several forms. There is of course the generic **conventional mission**. A pharmaceutical firm might exist to make a return on investment for its shareholders. A state agency might exist to serve the health care needs of the citizens of the state. In our examples, the **traditional mission** for a particular pharma firm might be to bring "innovations to drug discovery through the latest developments in biological research" and a state agency might "provide comprehensive health care through a network of trusted provider partners." A third dimension of this work might be called the **aspirational mission**, a bit more on this later as we see how missions evolve and inform vision.

ENVIRONMENTAL AWARENESS

An essential part of a leader's vision is the ability to understand what is happening around the organization. Different from the more immediate and tactical situational awareness, perspective into longer term and more global developments shape environmental awareness. Too much focus on the here and now creates organizational myopia and the leader will miss opportunities and threats that are coming their way. Too broad or far reaching and the leader's pronouncements become more hallucinogenic than helpful, because few, if any, will be able to see themselves or the organization in a land that seems like pure fantasy. So, balance is key to good environmental awareness and this comes from seeing the issues, but also understanding how they will be understood by the incumbents in the organization.

Some leaders do this dimension of visioning easily, they are naturally curious about the world and how it is changing. Their challenge will be how to interpret these opportunities or threats so that they get traction and how to translate them into actionable plans. They will need to empower others and, at times, cease and desist with the big new ideas and blinding insights and let things get done. The leader opposite to this is the individual who is great at the actionable plan, lives in the immediate world, but may not be blessed with constant epiphanies. They will need to use their leadership position and role to convene others in settings where these insights can be gleaned. They do not need to have the vision themselves, but they do need to recognize its essential value and ensure that it is given time and resources to be present.

VISION RECONSIDERED

I will grant that it is odd that one part of this vision definition in five parts is called "vision reconsidered" but let me explain. Each of these elements is one dimension of what it takes for a leader to be thought of as a successful visionary. Vision reconsidered is the same thing that I referred to earlier as 'aspirational vision'. To develop this, first ask the question: what have our mission and values been conventionally and traditionally? Second ask: how is the world around us changing, what is most important among these changes and how will they impact what we do and how we do it? Finally: given your earlier answers, how should our mission and direction change, anchoring enough in the past for continuity, but tacking into the challenges of the future in a way to still be valuable?

STRATEGY

It is one thing to get the vision correct and another to be the leader that can also set and sequence the strategies, turning the organization to meet the new opportunity. Without strategies to move forward the vision will be seen as a failure.

There are many ways to develop and share strategies. Some can be content oriented such as program change, finance, human resources or technology. It often makes sense to divide strategies into short and long-term. And while it is important that strategic directions be formalized so that they can be fully understood and accountabilities assigned, it is essential that they be recognized as evolving. General Eisenhower once observed that the “plan is nothing...planning is everything.”

In many situations there are often short-term strategies that meet immediate threats, or offer quick turnarounds to engage the organization. They may not have staying power long term, but they are essential in the short. A lot of organizations never make it out of this limited horizon or ‘scramble’ strategies, but if leadership can hold these quick fixes to under 60 percent of the overall strategic effort, then they have been heroic and most likely maintained their overall vision

Next along the curve in terms of time and effort are the strategies to “improve.” Imagine that some dimension of the organization isn’t working, but is still essential. It takes time to enhance the way it is working, but the pay-off is likely to be longer term and more impactful. This strategy usually involves hard decisions and big changes, but can pay off just as big towards vision.

Beyond improvement is “reinvention.” This involves some fundamental reorganization or reconsideration of the standard process. If both improve and reinvent can hit 30 percent combined of your strategic effort, then you get advanced leadership standing.

But that leaves 10 percent. This final category we called “start-over.” This is not just a tweak or improvement to one specific part of the work, not a new look or reinvention of process and task, but instead a complete tossing out and overhaul of how the work itself actually works. Think of the move from gas powered engines to electric in our cars. While there is an obvious technological update, moreover, it has begun a shift of the industry and new conversation about transportation in general. Remember this is usually a long-term strategic investment and should never be more than the 10 percent of the overall effort, least the original vision gets lost all together

I think that as a part of vision the best strategic plans are a mix of the emergent and intentional, are nimble, adaptive and opportunistic, have clear goals and expected impact on the organization and are continuously assessed, reshaped and redeployed as needed.

OPS

You don’t usually see a sub-heading for operations in a discussion of vision, but I think it is important for leaders to understand the role that a visibly and meaningfully integrated operations plan that is supporting the strategies, which support the vision, can mean to the overall organization.

I sometimes refer to this as the “vision or strategy cascade.” Someone new to the organization, a potential new partner or an old hand in the organization should be able to hear the messaging from the mission, point to relevant changes in the environment, recognize the deliberate and emerging strategies and assess the operational plans that are being pursued and see a coherent whole that

cascades from one level to another. This type of organization coherence is powerful because it makes the vision real at all levels and it informs the actions of everyone throughout the enterprise.

Having “vision” is not one thing, but a mixed bag of knowledge, insight, perspectives and actions.